

## Retention and Classification Report

**Agency:** Workers Compensation Fund Division. Policyholder Services (1282)

560 South 300 East  
Salt Lake City, UT 84110  
801-538-8025

**Records Officer:** \_\_\_\_\_

08529    \*Active policyholder case files  
08528    \*Inactive policyholder case file

**AGENCY:** Workers Compensation Fund Division. Policyholder Services

**SERIES:** 8529

3

**TITLE:** Active policyholder case files

**DATES:** 1917-1988.

**ARRANGEMENT:** Alphabetical by policyholder name

**DESCRIPTION:**

These are reference files which document the activities of current policyholders with the Workers' Compensation. They are used to track policy contract provisions and premium payment history. These are considered vital records and are backed-up by a master file located on the management information system. These files include policy contract endorsements, work locations where policy is in effect, business owner, premium payment history and reports, audit reports, workpapers, and correspondence between the policyholder and the Workers' Compensation.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 10/1986

**FORMAT MANAGEMENT:**

Paper: Retain in Office until policy is cancelled or case file closed and then transfer to Inactive Policyholder Case Files.

**APPRAISAL:**

These records have administrative, and/or legal value(s).  
Previous decision: RDR 76-11: 10 years/private.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Workers Compensation Fund Division. Policyholder Services

**SERIES:** 8528

3

**TITLE:** Inactive policyholder case file

**DATES:** 1983-1988.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are reference files which document the activities of former policyholders with the Workers' Compensation. They may be used as source data if a former policyholder wants to reinstate their policy. These files include policy contract endorsements, work locations where policy is in effect, business owner, premium payment history and reports, audit reports, workpapers, and correspondence between the policyholder and the Workers' Compensation.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 10/1986

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years and then microfilm and transfer to State Archives with authority to weed.

Microfilm master: Retain in State Archives permanently with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). The correspondence and contract endorsements are the only data that are worth retaining permanently. They are historically pertinent data and should be kept in the Archives. Previous decision: RDR 81-24: 3 years/private.

**PRIMARY DESIGNATION:**

Private