

Retention and Classification Report

Agency: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired (1377)
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Records Officer: _____

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AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82600

1

TITLE: Administrative files

DATES: ca. 1957-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

These files contain the director's administrative correspondence and other materials relating to the development of services and the administration of the agency. They include correspondence, memoranda, and other materials; names, addresses, and issues relating to the needs of the legally blind and visually handicapped.

RETENTION:

Permanent. Retain for 10 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

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

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). General Schedule 23 Item 1 lists a two year retention for general housekeeping administrative files. Program correspondence, however, has a permanent retention. Records under "A" relate solely to the internal housekeeping activities of the agency including budget papers; expenditure of funds; day-to-day administration of office personnel, including training and travel; supplies, office services and equipment requests; and all other materials that do not serve as the official documentation

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82600

TITLE: Administrative files

(continued)

of the programs of the agency.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. Personnel and client issues are private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82595

3

TITLE: Agency leave slips

DATES: 1985-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are the agency copies of leave applications. They include employee name and social security number, hours requested, and dates.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after employee has signed annual leave compilation card and then destroy.

APPRAISAL:

These records have administrative value(s).
General Schedule 2 Item 9.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82603

3

TITLE: Authorization for services files

DATES: 1980-2020.

ARRANGEMENT: Numerical by authorization number.

DESCRIPTION:

These are copies of purchase authorizations and adjustment forms which document the purchase of equipment, bus passes, and other services for clients of the program and generated by the Client Daily Authorization Data System. The vendor maintains the original. These files include date; description of equipment, item or service purchased; vendor name, number, and address; and case number.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

This retention is based on the needs of the agency and in the event of a federal audit.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82603

TITLE: Authorization for services files

(continued)

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82607

3

TITLE: Billing files

DATES: 1980-2020.

ARRANGEMENT: Numerical by authorization number.

DESCRIPTION:

These files collect the necessary documentation for payment to vendors for items and services purchased. These files include vendor name, number, and address; description of items or services purchased; copy of Daily Purchase Authorization; correspondence; and invoices.

RETENTION:

Retain until final action

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office until file is complete and then transfer to Utah State Office of Education.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

This retention is based on the needs of the agency in order to accumulate the necessary documentation for payment.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82607

TITLE: Billing files

(continued)

SECONDARY DESIGNATION(S):

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 1847

3

TITLE: Bills register

DATES: 1897-1900.

ARRANGEMENT: Alphanumerical

DESCRIPTION:

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82604

3

TITLE: Case service weekly alphabetical list report

DATES: 1985-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

This is a computer printout generated by the Utah State Office of Education (USOE) which indicates amounts paid to vendors on behalf of clients and is used to track expenditures of the agency. These reports include name of vendor, name of client, dates, and amounts paid out.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

APPRAISAL:

These records have administrative value(s).

This information is used in program planning and ties in with client files; therefore a five year retention is needed.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82604

TITLE: Case service weekly alphabetical list report

(continued)

PRIMARY DESIGNATION:

Private

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82609

3

TITLE: Client case card files

DATES: 1968-2020.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These are card files which act as indexes to active and closed Client Case Files. These files includes client name, address, telephone number, and case status.

RETENTION:

Retain for 5 year(s) after case is closed

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years after case is closed and then destroy.

APPRAISAL:

These records have administrative value(s).

These cards are used to reference client files and are needed for the retention of the files.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82602

3

TITLE: Client daily authorization data system

DATES: 1985-2020.

ARRANGEMENT: None.

DESCRIPTION:

This data system contains and tracks information concerning rehabilitation clients, is updated continually, and is used for generating reports, purchase authorizations, and for billing. This data is entered on a Courier system with access to the mainframe at the Utah State Office of Education. This series includes age, birthplace, client status codes, current and past addresses, date of birth, dates of activity in programs, job position information, marital status, medical information, name of next of kin, name, occupation, public housing occupancy, race, sex, social security number, telephone number, and types of services and items purchased.

RETENTION:

Retain for 10 year(s) after case is closed

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 5 years after client file is closed and then transfer to magnetic tape.

Computer magnetic storage media: Retain in Tape Library for 5 years and then erase.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

This data system is related to information contained in the Client Case Files and has the same retention.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82602

TITLE: Client daily authorization data system

(continued)

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 12/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82606

3

TITLE: Client intake/closed file reports

DATES: 1985-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

This is a computer printout report generated by the Utah State Office of Rehabilitation and provides a list of new clients and clients whose files are closed. This report includes client numbers and dates files closed.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

APPRAISAL:

These records have administrative value(s).

This information is used in program planning and a five year retention is needed.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 12/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82605

3

TITLE: Cumulative case load report

DATES: 1985-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

This is a computer printout generated by the Utah State Office of Rehabilitation and indicates the clients assigned to various counselors. This report includes name of client, name of counselor, and inclusive dates.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

APPRAISAL:

These records have administrative value(s).

This information is used in program planning and ties in with client files; therefore a five year retention is needed.

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 12/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82610

3

TITLE: Director's administrative files

DATES: ca. 1980-

ARRANGEMENT: Chronological.

DESCRIPTION:

These files contain the director's administrative correspondence and other materials relating to the development of services and the administration of the Division of Services for the Blind and Visually Impaired. These files include correspondence, memoranda, and other materials; names and addresses.

RETENTION:

Permanent. Retain for 10 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office for 5 years after administrative value has been met or until administrative value has been met and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). General Schedule 23 Item 1 lists a two year retention for general housekeeping administrative files, which include budget papers; expenditure of funds; day-to-day administration of office personnel, including training and travel; supplies, office services and equipment requests; and all other materials that do not serve as the official documentation of the programs of the

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired
SERIES: 82610
TITLE: Director's administrative files

(continued)

agency. Program correspondence and other materials that document the development of services and programs, however, have a permanent retention.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82590

3

TITLE: Division of Services for the Blind and Visually Impaired Advisory Council meeting files

DATES: 1970-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These are minutes and meeting files of the Division of Services for the Blind and Visually Impaired (DSBVI) Advisory Council which document discussions of issues and resolutions. They include names and contact information for advisory council members, minutes of meetings, and correspondence relating to the issues of the council.

RETENTION:

Permanent. Retain for 10 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then transfer to Agency Record Center. Retain in Agency Record Center for 5 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office for 5 years or until administrative value has been met and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). These records are historical because they provide evidence of significant policy formulation and business processes of the government, and because they provide evidence of governmental deliberations, decisions, and actions relating to major social, economic, and environmental issues.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82590

TITLE: Division of Services for the Blind and Visually Impaired Advisory Council meeting files

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82616

3

TITLE: Division of Services for the Blind and Visually Impaired client case files

DATES: ca. 1970-

ARRANGEMENT: Alphabetical by name.

ANNUAL ACCUMULATION: 2.40 cubic feet.

DESCRIPTION:

These files form complete case histories and document client registration, eligibility, and services rendered to legally blind and visually impaired individuals. The files are divided into Current Case Files and Deceased Case Files. These files include case information and referral form; clinical reports; physician's report of eye examination including diagnosis, prognosis, and insurance information; supplemental report of eye examination; remarks of teachers; obituaries; and other documentation relating to care and treatment of eligible individuals. Data elements include age, current and past addresses, date of birth, educational level, medical information, marital status, military service, name, name of kin, occupation, physical disabilities, religious preferences, social security number, and telephone number.

RETENTION:

Permanent. Retain for 7 year(s) after separation

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after client is deceased and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office until administrative need is met and then transfer to State Archives with authority to weed.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82616

TITLE: Division of Services for the Blind and Visually Impaired client case files

(continued)

APPRAISAL:

These records have administrative, and/or historical value(s).
These case files may be current for several years and may contain many personal impressions of physicians and teachers, therefore requiring a classification of "confidential" for those selected pieces of information. These case files document the programs and treatment of Utah's legally blind and visually impaired and possess rich research value similar to other patient case files.

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

Controlled

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 1849

3

TITLE: Minute books

DATES: 1909-1911.

ARRANGEMENT: Alphanumerical.

DESCRIPTION:

Minutes of open and closed committee and board meetings as required by UCA 52-4-7.5(2005), et seq. "Written minutes shall be kept of all open meetings.(UCA 52-4-7 (2005)). May include agenda, meeting minutes, transcripts, and other supporting documentation.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Open meeting minutes & supplementary materials, GRS-1709.

AUTHORIZED: 10-28-2020

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have historical value(s).

Minutes provide evidence of deliberations, decisions, and actions of the agency.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 09/2017.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82594

3

TITLE: Motor vehicle operating and maintenance files

DATES: ca. 1985-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are records relating to the general maintenance and service of motor pool vehicles. They include gas receipts, mileage reports, repair reports.

RETENTION:

Retain for 1 year(s) after disposition of asset

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after disposal of vehicle and then destroy.

APPRAISAL:

These records have administrative value(s).
General Schedule 10 Item 2.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82614

3

TITLE: Motor vehicle operation files

DATES: 1985-2020.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These are files relating to individual employee operations of government-owned vehicles. These files include employee name, insurance information, authorizations, and other documentation.

RETENTION:

Retain for 3 year(s) after separation or for 0

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after separation of employee or until cancellation of authorization to operate vehicle and then destroy.

APPRAISAL:

These records have administrative value(s).
General Schedule 10 Item 7.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82593

3

TITLE: Motor vehicle release files

DATES: ca. 1982-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are files relating to transfer, sale, donation, or exchange of vehicles. They include titles to vehicles, other records relating to release of vehicle.

RETENTION:

Retain for 4 year(s) after disposition of asset

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years after vehicle leaves custody of agency and then destroy.

APPRAISAL:

These records have administrative value(s).
General Schedule 10 Item 6.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82592

3

TITLE: Original braille primers

DATES: 1975-2020.

ARRANGEMENT: None.

DESCRIPTION:

These are thin metal plates bound with masking tape that are perforated with braille symbols (alphabetic and numeric). The plates are used to make three basic primers, through a heat process and plastic paper, for teaching braille.

RETENTION:

Permanent. Retain for 20 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Artifacts: Retain in Office for 20 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s).
These plates were created by the staff of the division and provide excellent evidence of the manner in which braille has been taught to Utah's visually handicapped citizens.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82596

3

TITLE: Personnel files

DATES: ca. 1957-2019.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These are the agency's personnel files containing the complete work history of the employee. Included in these files are duplicate material from the official personnel file as well as the application, notices of changes in status, leave cards, letters of commendation, and other certificates.

RETENTION:

Retain until final action

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after separation or transfer and then transfer unique material to Office of Education.

APPRAISAL:

These records have administrative value(s).
General Schedule 1 Item 18.

PRIMARY DESIGNATION:

Public The approved 17 data elements

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82596

TITLE: Personnel files

(continued)

SECONDARY DESIGNATION(S):

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2019.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82591

3

TITLE: Petersen fund and visually impaired trust fund files

DATES: 1970-2020.

ARRANGEMENT: Alphabetical by subject.

DESCRIPTION:

These records provide the documentation for the administration of the Petersen fund, and the Visually Impaired Trust Fund, established to provide support to the blind and visually impaired. The files contain reports and correspondence relative to the administration of the funds.

RETENTION:

Retain for 6 year(s) after final action

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after funds are expended and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

Computer data files: Retain in Office for 6 years after final action or until administrative value met, whichever is greater and then delete.

APPRAISAL:

These records have administrative, fiscal, and/or historical value(s). 26 CFR 1.6033-2 indicates that trusts may be treated as a private foundation and that appropriate documentation be maintained. 26 CFR 1.6033-3 indicates a six year retention for records relating to taxable funds. This retention will also allow for audits. However, because of the research value of many of the records, the correspondence and reports will be maintained permanently.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82591

TITLE: Petersen fund and visually impaired trust fund files

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. Utah Code 63G-2-302(2)(d) (2020)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 27551

3

TITLE: Publications

DATES: 1978-1980.

ARRANGEMENT:

DESCRIPTION:

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

AUTHORIZED: 10-30-2018

FORMAT MANAGEMENT:

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

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have historical value(s).

Disposition based of records in documenting agency achievements, functions, programs and policies for education of individuals who are visually impaired.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82611

3

TITLE: Rehabilitation Services section personnel files

DATES: ca. 1976-2020.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These are the supervisor's personnel files, maintained as a convenience for the section. These files include duplicate material from the official personnel file including the application, notices of changes in status, leave cards, letters of commendation, and other certificates.

RETENTION:

Retain for 1 year(s) after separation

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after separation or transfer and then transfer unique material to Office of Education.

APPRAISAL:

These records have administrative value(s).
General Schedule 1 Item 18.

PRIMARY DESIGNATION:

Public Approved 17 data elements

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82611

TITLE: Rehabilitation Services section personnel files

(continued)

SECONDARY DESIGNATION(S):

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82608

3

TITLE: Social Security referral files

DATES: 1980-2020.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These files contain referrals from the federal Social Security Office and document individuals eligible for Social Security Disability Insurance or Social Security Supplemental Security Income who may also be eligible for services provided by the agency. These files Includes age, current and past addresses, income, job position information, marital status, name, occupation, physical disabilities, rehabilitation status, social security number, and telephone number.

RETENTION:

Retain for 5 year(s) after case is closed

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after case is closed and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

These records have administrative value(s).

Positive referrals are accepted as clients and the documentation is then added to the Client Case Files. The remaining files indicate that the referred individuals did not want to participate in Rehabilitation Services programs, and are maintained according to agency needs.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82608

TITLE: Social Security referral files

(continued)

PRIMARY DESIGNATION:

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 11/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82612

3

TITLE: Supervisors' leave slips

DATES: 1985-2020.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These are the supervisor's copies of completed applications for leave. These applications include employee's name, social security number, hours requested, and dates.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then destroy.

APPRAISAL:

These records have administrative value(s).
General Schedule 2 Item 9.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82598

3

TITLE: Surplus property case files

DATES: 1985-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are case files on sales of surplus property and related documentation. They include correspondence, surplus property forms, lists of materials, and other documentation.

RETENTION:

Retain for 6 year(s) after resolution of issue

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 6 years after payment and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 4 Item 6.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82613

3

TITLE: Travel files

DATES: 1980-2020.

ARRANGEMENT: Alphabetical by name.

DESCRIPTION:

These files provide the documentation for employee travel. They include employee name, receipts, copies of itinerary, and other documentation.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 9 Item 4.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.

AGENCY: Department of Workforce Services. Office of Rehabilitation. Division of Services for the Blind and Visually Impaired

SERIES: 82615

3

TITLE: Warrant requests

DATES: 1985-2020.

ARRANGEMENT: Chronological.

DESCRIPTION:

These are agency copies of warrant requests. They include vendor name and number, intended use, date, and amounts.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after end of fiscal year and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
General Schedule 6 Item 1.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2020.