

## Retention and Classification Report

**Agency:** Department of Workforce Services. Panguitch Employment Center (1903)

665 North Main  
PO Box 61  
Panguitch, UT 84759  
435- 676-8893

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

07066	*Eligibility case files
07302	*Home energy assistance target program case files

**AGENCY:** Department of Workforce Services. Panguitch Employment Center

**SERIES:** 7066

3

**TITLE:** Eligibility case files

**DATES:** 1976-2019.

**ARRANGEMENT:** Alphabetical by client surname.

**DESCRIPTION:**

These files document complete case histories of clients receiving services provided in or through a social services office (OSS). Programs are funded by the Division of Family Services (DFS), Services to the Handicapped (DSH), State Office of Social Services (OSS), Aging and Adult Services (DAAS), and/or local discretionary funds. Two regions also carry programs for the Division of Mental Health (DMH), and the Division of Alcoholism and Drugs (DAD). The following record series are not included: adoptions (including interstate compact adoptions), foster care and interstate foster care files, substantiated and unsubstantiated child abuse/neglect files, the central register, ombudsman case files (elderly abuse), adult abuse case files, adult abuse central register, licensing files, all Training School and State Hospital Files. Client case files include but are not limited to the following types of eligibility and determination forms: Application for Financial, and Medical; Application for Social Services; Request for Expended Services (obsolete 11-87); Notice of Decision (income report); Certification of Handicapping Condition; Client Admission/Level of Care Determination; Child Abuse/Neglect Report; and Adult Protection/Spouse Abuse Report. Information includes name, birth certificates, social security number, car registrations and titles, court documents, medical reports, certification of tribal membership, lien agreements, guardianship orders, activity logs, surveys, progress notes, and permanency and individual service plans.

**RETENTION:**

Retain for 5 year(s) after case is closed

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Client case files, GRS-2568.

**AUTHORIZED:** 06-12-2019

**AGENCY:** Department of Workforce Services. Panguitch Employment Center

**SERIES:** 7066

**TITLE:** Eligibility case files

(continued)

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year or until case is closed and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

**APPRAISAL:**

These records have administrative, fiscal, and/or legal value(s).  
This disposition is based on 42 CFR 455.105 (1990) which specifies that these records be retained for a minimum of five years.

**PRIMARY DESIGNATION:**

Private

**SECONDARY DESIGNATION(S):**

Controlled. Psychiatric and psychological information

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 07/2019.

**AGENCY:** Department of Workforce Services. Panguitch Employment Center

**SERIES:** 7302

3

**TITLE:** Home energy assistance target program case files

**DATES:** ca. 1991-1997.

**ARRANGEMENT:** None

**DESCRIPTION:**

These case files are created by home energy assistance target eligibility workers. The purpose of the record is to gather information to verify and determine eligibility for home energy assistance. Information gathered for verification purposes include age, employer, date of birth, marital status, name, national origin, number of children, race and ethnic grouping, salary and income information, sex, signature of client, social security number, and telephone number.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Home energy assistance target program case files (heat), GRS-2569.

**AUTHORIZED:** 06-12-2019

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

**PRIMARY DESIGNATION:**

Private