

REQUEST FOR RECORDS RETENTION SCHEDULE
To be Submitted to the Records Management Division
Hall of Records Commission

1. Requesting Agency

STATE DEPARTMENT OF PUBLIC WELFARE

2. Division or Bureau of Requesting Agency

STATISTICAL DIVISION

3. Authorization Requested (Check only one of the squares below).

NS - NEW SCHEDULE

A Dispose of present accumulation. No additional accumulation is anticipated. Records have ceased to have value to warrant retention.

B Establish retention schedule for records for which there is a continuing accumulation. The records will cease to have value to warrant their retention after the period of time indicated.

C Microfilm and destroy originals. Originals if not microfilmed would be retained for the period of time indicated.

4. Item No.

5. Description of Records
Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation of Hall of Records and Board of Public Works.

1. SOURCE CARDS

Size: 8 1/2" x 11"
Quantity: 8 drawers (12 cubic feet)
Dates: 1935 - -
File Arrangement: 392 series - Alphabetical
359 series - Chronological
Annual Accumulation: 1/2 cubic feet
Audited by: State, Federal, and Internal

Source cards are used for forecasting trends in welfare assistance, obtaining average case loads, average costs, budgetary purposes, and are constantly referred to for special studies. The information on the 359 Series cards is obtained from worksheets and Monthly Statistical Reports of services received from the county welfare boards. In each instance the card is ruled for two years' entries - entries being made monthly.

- ~~SDPW~~ 359-F (Blue) Living Arrangements of Children in Cases Receiving Service at End of Month.
- ~~SDPW~~ 359-L (Yellow) Number of Persons Included in Grants of Assistance.
- ~~SDPW~~ 359-M (Salmon) General Public Assistance Employables - Status of Applications and Cases Receiving Continuing Service.
- ~~SDPW~~ 359-M General Public Assistance - Status of Applications and Cases Receiving Continuing Service.

APPROVED
HALL OF RECORDS COMMISSION

7. Agency, Division or Bureau Representative

[Signature]

Director

June 24, 1955

Signature

Title

Date

Schedule Authorized as Indicated in Col. 6 by Hall of Records Commission.

Disposal Authorized as Indicated in Col. 6 by Board of Public Works.

7/7/55
Date

[Signature]
Archivist

JUL 11 1955
Date

[Signature]
Secretary

REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

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No.

5. Description of Records
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6. Recommendation of Hall of Records and Board of Public Works.

- ~~SDPW 359-M~~ ^{SDSS} (White) - Aid to Permanently and Totally Disabled - Status of Applications and Cases Receiving Continuing Service.
- ~~SDPW 359-M~~ (Brown) - Public Assistance to the Needy Blind - Status of Applications and Cases Receiving Continuing Service.
- ~~SDPW 359-M~~ (Green) - Aid to Dependent Children - Status of Applications and Cases Receiving Continuing Service.
- ~~SDPW 359-M~~ (Yellow) - Old Age Assistance - Status of Applications and Cases Receiving Continuing Service.
- ~~SDPW 359-0~~ (White) - Aid to Permanently and Totally Disabled - Number of Individuals Assisted, Obligations Incurred and Average Grant per Individual.
- ~~SDPW 359-0~~ (Brown) - Public Assistance to the Needy Blind - Number of Individuals Assisted, Obligations Incurred and Average Grant Per Individual.
- ~~SDPW 359-0~~ (Yellow) - Old Age Assistance - Number of Individuals Assisted, Obligations Incurred and Average Grant Per Individual.
- ~~SDPW 359-P~~ (Green) - Aid to Dependent Children, Number of Families and Recipients Assisted, Obligations Incurred for Assistance, and Average Grant Per Family, Per Recipient, and Per Child.
- ~~SDPW 359-Q~~ (Salmon) - General Public Assistance - Number of Cases Assisted, Obligations Incurred and Average Grant Per Case.
- ~~SDPW 359-Q~~ (Salmon) - General Public Assistance Employables - Number of Cases Assisted, Obligations incurred and Average Grant Per Case.
- ~~SDPW 359-T~~ (Blue) - Foster Care - Number of Children for Whom Boarding Payments are Made, Obligations Incurred and Average Payment per Child.
- ~~SDPW 359-V~~ (White) - Service at Request of Other Agency - Public Assistance, Old Age Survivor's Insurance, Selective Service Boards and Others.

APPROVED
HALL OF RECORDS COMMISSION

Date . JUL 11 1955

James A. ...
Secretary

(T) ^{AD} REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

No.

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6. Recommendation of Hall of Records and Board of Public Works.

SDPW 359-V (Blue) - This form includes the following eight categories: 1. Foster Care Other Than Adoption; 2. Foster Care, Adoption; 3. Protective Service for Children-Families; 4. Service to Parents in Relation to Foster Care; 5. Service to Parents in Relation to Adoption; 6. Adoption Investigations for the Courts; 7. Service-Training Schools, Supervision Families; and 8. Service-Training Schools, Admission and Discharge Investigations.

SDPW 359-W (Blue) - Approved Agency Adoptive-Home Status of Applications and Cases Receiving Continuing Service (Foster Homes)

SDPW 359-X (White) - Status of Requests for Certification for General Hospital Care.

SDPW 359-X (White) - Status of Requests for Certification for Chronic Hospital Care.

SDPW 359-Z (White) - Status of Request for Certification for Special Type Hospital Care and Mental Hospital Care.

The information for the 392 series is obtained from the Quarterly Population Reports submitted by Child Care Agencies and Institutions. Cards in this series are ruled for four years' Quarterly Entries.

SDPW 392-A (Green) - Status of Number of Children under care and Number of Families Represented by Children Under Care at End of Quarter.

SDPW 392-B (Green) - Type of care Received by Children on Last Day of Quarter.

SDPW 392-C (Green) - Number of Days Care Given to Children.

RECOMMENDATION: RETAIN PERMANENTLY.

2. MONTHLY STATISTICAL REPORT OF SERVICES

Form No.: SDPW - 250
Size: 8 1/2" x 11" (3 pages)
Quantity: 3 letter-size drawers (1 1/2 cubic feet)
Dates: July 1947 - -
File Arrangement: Chronological
Annual Accumulation: less than 1/2 cubic foot
Disposable Amount: 3 cubic feet
Audited by: Federal, State

Monthly report summarizing local departmental activities submitted

APPROVED
HALL OF RECORDS COMMISSION

APPROVED BY /
BOA WORKS

Date ...

J. McLesker
Secretary

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REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

5. Description of Records

Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation of Hall of Records and Board of Public Works.

Item No.

to State Department, showing the following information:

- A. Summary of Requests for Information Services
- B. Summary of Assistance
- C. Summary of Protective Service, Foster Care of Children and Adoption Services.
- D. Summary of Service to Training Schools and of Certifications as to Eligibility for Care at State Expense.
- E. Summary of Services at Request of Other Agencies and Local Services.
- F. Detail of Children Receiving Foster Care or Adoption Service.
- G. Detail of Agency Adoptive Homes
- H. Detail of Living Arrangements of Children in Cases Receiving Service at End of Month.

Information under the various headings above is detailed as to type of assistance and program. Copies of the reports are retained by the originating office.

Data in these reports is used to prepare Source Cards, the monthly financial and statistical report, the annual report, staff measurement report, and for ascertaining administrative cost by program. This information is also used to prepare reports of the assistance program submitted to the Federal Social Security Administration, Public Assistance Division.

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED (STATE AND FEDERAL), WHICHEVER IS LATER, AND THEN DESTROY.

3. REPORT OF DISTRIBUTION OF ASSISTANCE GRANTS

Size: 8 1/2" x 11"
 Quantity: 1 letter-size drawer (1 1/2 cubic feet)
 Dates: 1940 - -
 File Arrangement: Alphabetical by county by year
 Annual Accumulation: 2 linear inches
 Disposable Amount: 1 cubic foot

APPROVED BY
 H. O. A. WORKS
 JUL 11 1955
[Signature]
 Secretary

This file consists of SDPW forms 503 and 603. Form 503 is a single page report for each of 4 categories - Old Age Assistance, Public Assistance to Needy Blind, General Public Assistance, and Aid to Permanently and Totally Disabled. Form 603 is an 8 sheet form concerned with Aid to Dependent Children. These forms are prepared annually for one month only (generally September) by each county. These reports are required by the Federal Social Security Administration and are also used by the State Department for preparing the budget and estimating the effects of changes in assistance standards.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

APPROVED
HALL OF RECORDS COMMISSION

*N.S.
How 30*

REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
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4. MONTHLY REPORT OF CASELOAD COVERAGE

Form No.: SDPW 217 and Worksheet
 Size: 8½" x 11"
 Quantity: 2½ letter-size drawers (4 cubic feet)
 Dates: 1941 --
 File Arrangement: By County and Chronologically therein
 Annual Accumulation: 6 linear inches
 Disposable Amount: 3 cubic feet

These reports are submitted monthly in duplicate by each county. They are compiled from the caseload control cards, maintained by the county, and show the status of caseload in regard to periodic case reconsideration. The form indicates reconsideration on cases completed; begun and not completed; and not begun, indicating when reconsideration is due. Form 217 covers four types of aid; Public Assistance, Foster Care, Foster Home, and State Aid Special Type Hospital. The State Department prepares a monthly worksheet, one for each type of aid, showing by County and State total the caseload coverage. The reports and worksheets are used for administrative purposes and by field supervisors to determine continued eligibility for assistance or service.

RECOMMENDATION: RETAIN FOR THREE YEARS AFTER RECEIPT AND THEN DESTROY.

5. MONTHLY REPORT ON REASONS FOR MAKING GRANTS, NOT MAKING GRANTS, AND CANCELLING GRANTS.

Size: 8½" x 11"
 Quantity: 8 letter-size drawers and 3 transfiles (18 cubic feet)
 Dates: 1937 --
 File Arrangement: By county and chronologically therein
 Annual Accumulation: 1 cubic foot
 Disposable Amount: 15 cubic feet

This file consists of three single-page forms:

- SDPW 236 Report of Reasons for Making Grants of Assistance for Month of
- SDPW 237 Report of Reasons for Not Making Grants of Assistance for Month of
- SDPW 238 Reports of Reasons for Canceling Grants of Assistance for Month of

All three forms are received from each county and show the following information: case, number, name, code, and statement of reason

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FILED BY
BOARD OF PUBLIC WORKS

Date JUL 11 1953

[Signature]
Secretary

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REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

Hall of Records Commission

5. Description of Records.

Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation of Hall of Records and Board of Public Works.

Item No.

for the action taken regarding the case.

RECOMMENDATION: RETAIN FOR THREE YEARS AFTER RECEIPT AND THEN DESTROY.

6. SUMMARIES OF SDFW FORMS 236, 237, and 238

Size: 8½" x 11"
Quantity: 1 letter-size drawer (1½ cubic feet)
Dates: 1937 - -
File Arrangement: By county and chronologically therein.
Annual Accumulation: 1 linear inch
Disposable Amount: ½ cubic foot

The monthly reports listed in Item 3 above are summarized by county, city, and state, and are used for charting and analyzing trends, for budgeting purposes and for formulating policies and standards.

RECOMMENDATION: RETAIN FOR TEN YEARS AND THEN DESTROY.

7. FEDERAL PARTICIPATION IN ADMINISTRATIVE COSTS (WORKSHEETS)

Quantity: 4 cubic feet
Dates: 1943 - -
File Arrangement: By county and chronologically therein
Annual Accumulation: less than ½ cubic foot
Disposable Amount: 3 cubic feet
Audited by: State and Federal

This file contains the following material:

- SDPW 234 (5½" x 8½") Daily Report of Number of Interviews Submitted Daily by Each Case Worker for a Three Month Period (January, February, and March).
- Table C (8½" x 11") Two-page report - Calculation of Interview Time by Program for Annual Three Month Period for Which Interviews are Reported and Weight Per Case by Program.
- SDPW 398 (8½" x 11") Calculation of Percentages to be Applied to Administrative Costs to Determine Amounts Chargeable to Each Program.
- SDPW 398A (8½" x 11") Percentage Distribution to be Applied to Administrative Costs.

The forms are necessary to determine the amount of Federal participation in the cost of administration of the various programs administered by the State Department.

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HALL OF RECORDS COMMISSION

APPROVED BY
WORKS
JUL 11 1955

J. Melusson
Secretary

7/29/59
Now a weekly report.
To be forwarded to R...

REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

5. Description of Records
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6. Recommendation of Hall of Records and Board of Public Works.

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

8. ASSISTANCE DUE TO UNEMPLOYMENT (STATISTICAL DATA)

Form No.: 366
Size: 8 1/2" x 11"
Quantity: 1 cubic foot
Dates: July 1949 - -
File Arrangement: By county and chronologically therein
Annual Accumulation: 1 linear inch
Disposable Amount: 1/2 cubic foot

This form, Report on Information on Families and Individuals Coming to Department Because of Need Due to Unemployment, is forwarded monthly by each county board to the State Department. The report shows the family name, members of family, dependents, date last employed, status, employability of wage earner, whether receiving unemployment compensation and whether registered with the State Employment Service. Also included in the file is Form SDFW 317 (8 1/2" x 11") which is a summary of the above information on a State-wide basis by county. The two forms are used for statistical research purposes.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY

9. SEMI-ANNUAL STATISTICAL REPORTS (OLD AGE ASSISTANCE AND AID TO DEPENDENT CHILDREN)

Size: 8 1/2" x 11"
Quantity: 1 cubic foot
Dates: 1950 -
File Arrangement: Chronological
Annual Accumulation: 1/2 cubic foot
Audited by: State and Federal

This file consists of two reports:

Form SDFW 63 Semi-annual Statistical Report on Concurrent Receipt of Public Assistance and Old Age and Survivor's Insurance - Old Age Assistance

Form SDFW 64 Semi-annual Statistical Report on Concurrent Receipt of Public Assistance and Old Age and Survivor's Insurance - Aid to Dependent Children.

From these two forms a report is prepared for the Federal Social Security Board. These reports are used for estimating budget needs and to determine the effect of Social Security payments on the number

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COPIES
MADE BY
DATE 11-1-55

J. Mccluskey
Secretary

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4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
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of assistance cases carried by the State Department.

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

10. QUARTERLY POPULATION REPORT

Form No.: 392
 Size: 8½" x 11"
 Quantity: 2 letter-size drawers (3 cubic feet)
 Dates: 1939 - -
 File Arrangement: Alphabetical
 Annual Accumulation: 2 linear inches
 Disposable Amount: 2 cubic feet

This form, Quarterly Population Report From Licensed Agency or Institution, is forwarded to the Department by Child Care Agencies and the State Training schools. It is used for statistical purposes primarily and also by the licensing section of the Department as a review of the licensee's ability to handle the number of children being cared for. Information on these reports is posted to the source cards, (392) series.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

11. MONTHLY STATISTICAL REPORT OF TRAINING SCHOOLS

Form No.: 404
 Size: 8½" x 11"
 Quantity: 1½ cubic feet
 Dates: 1946 - -
 File Arrangement: by institution (alphabetical)
 Annual Accumulation: 3 linear inches
 Disposable Amount: 1 cubic foot

The State Department receives this 4-page report from each of the four training schools under the supervision, direction, and control of the Department. The report shows the number of boys or girls in the institution, or on parole, number of days' care given in the institution, the distribution by county and by type of commitment. The reports are used to analyze institutional population trends to forecast the future needs of the school, and for the preparation of the annual report.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

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APPROVED BY
BOARD OF PUBLIC WORKS

Date: ...
[Signature]

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To **REQUEST FOR RECORDS RETENTION SCHEDULE**
(Continuation Sheet)

4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
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12.

SOCIAL SECURITY REPORTS

Quantity: 4 cubic feet
 Dates: 1938 - -
 File Arrangement: Chronological
 Annual Accumulation: 2 linear inches
 Disposable Amount: 2 cubic feet
 Audited by: Federal, State, Internal

The Department submits several reports to Federal Agencies. These are necessary for allocation of Federal funds, for coordination of State and Federal programs, and for research purposes. The various forms used are:

Bureau of Public Assistance

Form No.

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P

- | | |
|-----------------------------------|---|
| PA-204 (11" x 17") | Monthly Statistical Report on Public Assistance |
| PA-270 | Annual Statistical Report on Distribution of Payments - Old Age Assistance, Aid to the Blind, Aid to Permanently and Totally Disabled |
| PA-271 | Annual Statistical Report on Distribution of Payments - Aid to Dependent Children |
| PA-277 (8" x 12 1/2")
3 sheets | Interpretive Outline Relating to Semi-annual Statistical Report on Staff of Public Assistance Agencies (Form 2003) |
| PA-2003 (10 1/2" x 16") | Annual Statistical Report on Staff of Public Assistance Agencies. |
| PA-2016 (8" x 10 1/2") | Aid to Dependent Children - Statistical Report on Notices Sent to Law Enforcement Officials. |
| | Other special Reports |

Children's Bureau

- | | |
|-------------------------|--|
| CB-251-S (8" x 10 1/2") | Report from State Agencies on Service to Individual Children by Public Welfare Agencies. |
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RECOMMENDATION: RETAIN FOR TEN YEARS AND THEN DESTROY.

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HALL OF RECORDS COMMISSION

NOV 11 1955
 Date
[Signature]