

Key # 21724

Submit three copies to: Department of General Services, California Records and Information Management, 707 Third St. 2nd Fl., W. Sacramento, CA 95605.

A CalRIM Consultant may be reached by phone at (916) 375-4404, by fax at (916) 375-4408 or by email at CalRIM@dgs.ca.gov

(1) DEPARTMENT, BOARD OR COMMISSION REHABILITATION		(2) AGENCY BILLING CODE 78029	(3) PAGE 1 OF 7 PAGES
(4) DIVISION/ BRANCH/ SECTION COMMUNITY RESOURCES DEVELOPMENT		(5) ADDRESS 721 CAPITOL MALL, SACRAMENTO, CA 95814	

CHECK THE APPROPRIATE BOX

- (6) New schedule of records that have never been scheduled. [Complete boxes (9) – (12)]
- (7) Revising a previous schedule. [Complete boxes (13) –(16)] (A new approval number will be assigned.)
- (8) Amending some pages of a previous schedule. [Complete boxes (13) – (16)] (The original approval number will remain in effect.)

NEW SCHEDULE INFORMATION (If applicable)	(9) SCHEDULE NUMBER A-0019 A1	(10) SCHEDULE DATE 1/26/2009	(11) NUMBER OF PAGES 7	(12) CUBIC FEET (Total Schedule) 33.225
PREVIOUS SCHEDULE INFORMATION (If applicable)	(13) SCHEDULE NUMBER A-0019	(14) APPROVAL NUMBER 08-319 <i>no flags</i>	(15) APPROVAL DATE 10/15/2008	(16) PAGE NUMBER (S) REVISED – ALL

(17) MISSION/FUNCTIONAL STATEMENT:

THE Community Resources Development Section provides services statewide to assist in the development and maintenance of diversified economically and operationally independent rehabilitation and habilitation programs and services; support Employment Preparation Services Unit's efforts to maximize rehabilitation placements; administer the Department's establishment grants program, and work to improve efficiency and effectiveness of the section's planning and budgeting.

*At present time documents are not being sent to the State Records Center

PART I – AGENCY STATEMENTS

As the program manager (or person authorized to sign for the program manager) directly responsible for the records listed on this records retention schedule, I certify that all records listed are necessary and that each retention period is correct. For revisions, all items on the previous schedule are included or accounted for on the recapitulation. Vital records identified by this schedule are protected. If protection is not currently provided but plans are underway, the details of such plans are shown in Column 45, Remarks.

(18) SIGNATURE - MANAGER RESPONSIBLE FOR THE RECORDS <i>[Signature]</i>	(19) TITLE STAFF SERVICE MANAGER II	(20) PHONE NUMBER (916) 558-5447	(21) DATE SIGNED 1/27/09
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In accordance with Government Code 14755, approval of this Records Retention Schedule by the Department of General Services is hereby requested. Retention periods shown have been established in accordance with the criteria set forth by Section 1667 of the State Administrative Manual.

(22) SIGNATURE- RECORDS MGMT. ANALYST <i>[Signature]</i>	(23) CLASSIFICATION STAFF SERVICES ANALYST	(24) NAME (Printed or Typed) MARK MARTINEZ	(25) PHONE NUMBER (916) 558-5006	(26) DATE SIGNED 1/27/09
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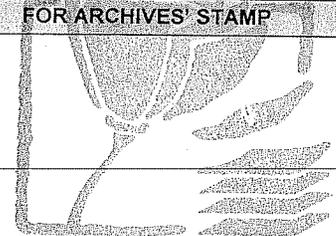
PART II – DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)

(27) SIGNATURE –CalRIM CONSULTANT <i>Ramona M. Gutierrez</i>	(28) APPROVAL NUMBER 08 319 <i>a</i>	(29) DATE SIGNED 4/2/2009	(30) EXPIRATION DATE 10/15/2013
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PART III – ARCHIVAL SELECTION (Per Government Code Section 14755)

THE ATTACHED RECORDS RETENTION SCHEDULE:

- (31) Contains no material subject to further review by the California State Archives
- (32) Contains material subject to archival review. Items stamped "NOTIFY ARCHIVES" may not be destroyed without clearance by the California State Archives. (Per Section 1671 of the State Administrative Manual.)



(33) SIGNATURE –CHIEF OF ARCHIVES OR DESIGNATED REPRESENTATIVE <i>[Signature]</i>	(34) DATE SIGNED 4/9/09
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ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS <i>(Double spaces between items)</i>	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA	REMARKS
						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)

			<p>Office Locations:</p> <p>Department of Rehabilitation Community Resources Development Section 2000 Evergreen Street Sacramento CA 95815</p> <p>Department of Rehabilitation Community Resources Development Section 18605 E. Gale Avenue, Suite 240 City of Industry, CA 91748-1361</p>								<p>SAM-State Administrative Manual RAM-Rehabilitation Administrative Manual Retention Criteria:</p> <p>ADMINISTRATIVE RECORDS: RAM Chapter 20, unless otherwise noted.</p> <p>PROGRAM RECORDS: Program Administrator decision, unless otherwise noted.</p> <p>EXEMPTION FROM DISCLOSURE: Government Code Section (6254 (c) Access to Data Subject to I.P.A. 1798.5</p> <p>X, I DESTRUCTION CRITERIA: Confidential Destruction</p>
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(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)
ADMINISTRATIVE RECORDS											
1	1.5		CHRONOLOGICAL FILE	P		2			2		Previously RRS A-0019 Item #1 <u>Retention Criteria:</u> Program Administrator decision. <u>Destruction Criteria:</u> Recycle
2	2.75		TRAVEL CLAIMS	P		1			1	X, I	Previously RRS A-0019 Item #2 <u>Retention Criteria:</u> Retain at least one year from end of fiscal year. Office copies only, RAM Chapter 20.
3	425		DRIVING RECORDS. To Include but not limited to: <ul style="list-style-type: none"> • STD261 Authorization to Use Privately Owned Vehicles • Driving Reports 	P		Active			Active	X, I	Previously RRS A-0019 Item #3 <u>Retention Criteria:</u> SAM 1600 AT-1, Retain until superseded or canceled.
4	2.55		ATTENDANCE RECORDS: <ul style="list-style-type: none"> • Individual Leave Statements • Individual Attendance Summary 	P		Active			Active	X, I	Previously RRS A-0019 Item #4 <u>Active:</u> Until verified with Human Resources Section. <u>Retention Criteria:</u> RAM Chapter 20

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						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)
5	2.65		PERSONNEL WORKING RECORDS: To Include but not limited to: <ul style="list-style-type: none"> Personnel & Health Benefits Documents Duty Statements, Work Schedules Emergency contact information Training Records 	P		Active +2			Active +2	X, I	Previously RRS A-0019 Item #5 <u>Active:</u> Length of employment <u>Retention Criteria:</u> RAM Chapter 20. Office copies only. Official Records in Department's Human Resources Section.
6	2.25		SUPERVISORY WORKING RECORDS To Include but not limited to: <ul style="list-style-type: none"> Documentation for performance appraisals, adverse actions, etc. Referrals to employee assistance programs. Other documents used by immediate supervisor in carrying out management responsibilities. 	P		Active +1			Active +1	X, I	Previously RRS A-0019 Item #6 <u>Active:</u> Length of employment, unless a personnel action is pending. <u>Retention Criteria:</u> RAM Chapter 20, documents of negative nature should be destroyed after 3 years unless an adverse action is pending.
7	1.175		ORAL EXAM PANEL RECORDS	P		1			1	X, I	Previously RRS A-0019 Item #7 <u>Retention Criteria:</u> RAM Chapter 20
8	.525		RECRUITMENT RECORDS: <ul style="list-style-type: none"> Includes job applications, certification lists, etc. 	P		Active		+2	Active +2	X, I	Previously RRS A-0019 Item #8 <u>Active:</u> Until interview process completed and hire made. <u>Retention Schedule:</u> SAM 1600-AT-1 and RAM Chapter 20.

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						OFFICE	DEPT.	SRC	TOTAL		
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)
9	.8		ACCOUNTING RECORDS: To include but not limited to: <ul style="list-style-type: none"> Telephone bills & Calling cards General Services Charge cards 	P		1			1		Previously RRS A-0019 Item #9 <u>Retention Criteria:</u> Retain for one year from end of fiscal year. Office copies only, RAM Chapter 20. <u>Destruction Criteria:</u> Recycle
10	1.6		PROCUREMENT RECORDS: To include but not limited to: <ul style="list-style-type: none"> Requisitions (STD, 5, 65, 66, 115, & 116) Stock Received Reports 	P		1			1		Previously RRS A-0019 Item #10 <u>Retention Criteria:</u> Retain for one year from end of fiscal year. Office copies only, RAM Chapter 20. <u>Destruction Criteria:</u> Recycle
11	1.5		PROCUREMENT AUDIT FILE: To include but not limited to: <ul style="list-style-type: none"> Copies of all purchase orders & estimates, regardless of cost Price Quotes, Bids 	P		4			4	X, I	Previously RRS A-0019 Item #11 <u>Retention Criteria:</u> Per Departmental and Federal requirements, to be retained until after State, Federal & Departmental audits, or four (4) years whichever occurs first.
12	.75		PROCUREMENT INCOMPATIBLE ACTIVITIES STATEMENTS	P		Active			Active		Previously RRS A-0019 Item #12 <u>Active:</u> Length of employment <u>Retention Criteria:</u> Title 9, California Code of Regulations, Sections 7412-7413
13	.375		PROPERTY RECORDS: <ul style="list-style-type: none"> Admin. Equipment Inventory DR152 Property Survey Report DR158 Property Survey Report 	P		Active			Active		Previously RRS A-0019 Item #13 <u>Active:</u> Until updated or deleted from property inventory <u>Destruction Criteria:</u> Recycle

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(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)
14	1.125		RECORD MANAGEMENT RECORDS: To include but not limited to: <ul style="list-style-type: none"> Records Retention Schedule STD 71 Transfer Lists 	P		Active			Active		Previously RRS A-0019 Item #14 <u>Active:</u> Until revised or all records have been destroyed. <u>Retention Criteria:</u> Office copies only. Official Records in Department's Business Services Section. <u>Destruction Criteria:</u> Recycle
15	.375		RECORD MANAGEMENT RECORDS: <ul style="list-style-type: none"> STD 70 Records Inventory Worksheet 	P		Active			Active		Previously RRS A-0019 Item #15 <u>Active:</u> Retain as current until next inventory <u>Destruction Criteria:</u> Recycle
16	.375		RECORD MANAGEMENT RECORDS <ul style="list-style-type: none"> Authorization for Records Destruction 	P		4			4		Previously RRS A-0019 Item #16 Retain for two years from date destruction is authorized. Then retain two more years or until audited, whichever occurs first (maximum of four years)

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(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)
17	12.5		PROGRAM RECORDS ESTABLISHMENT GRANTS	P		Active +1		3			Previously RRS A-0019 Item #18 <u>Active:</u> Life of Grant <u>Retention Criteria:</u> SAM 1600 AT-3
18			FACILITIES RECORDS: <ul style="list-style-type: none"> • General Information files • Individual folders for each facility 	E		3			3		Previously RRS A-0019 Item #17 <u>Active:</u> Until Revised or Superseded
19			COMMUNITY RESOURCES DEVELOPMENT RECORDS: Includes but not limited to: <ul style="list-style-type: none"> • General correspondence, chrons, memos, minutes, etc. • Historical Information • Misc. Reports 	E		3			3		Previously RRS A-0019 Item #19

TOTAL CUBIC FEET: 33.225

* Provide total of office and departmental