General Retention Schedule Update





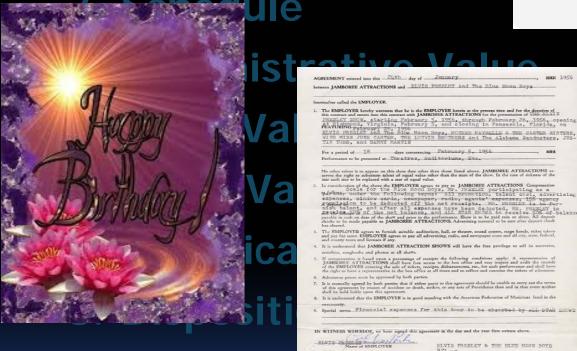
Glossary

- 2. Record Series
- 3. Schedule
- 4. Administrative Value
- 5. Legal Value
- 6. Fiscal Value
- 7. Historical Value
- 8. Disposition
- 9. Record Copy
- 10. Series-Specific Retention Schedule



2. Record Series





Meeting Minutes

PORTION

D-C60 MEET & TDK.

9. Record

IN WITNISS WHIREDOR, we have igned this agreement in the day and the year first written above.

REWIG BROKE ST LOVICE ELVIS FREELEY & THE BLAZE MOON BOYS

BUT GETWALL SERVEY

Mamphis, Tennessee BMFLOYER

ALL STAR SHOWS

372

ALL STAR SHOWS

372

10. Series-Specific Retention Schedule



Glossary

2. Record Series

3. Schedule



- 9. Record Copy
- 10. Series-Specific Retention Schedule



14 Regond

Glossary

- 2. Record Series
- 3. Schedule
- 4. Administrative Value
- 5. Legal Value
- 6. Fiscal Value
- 7. Historical Value
- 8. Disposition
- 9. Record Copy

10. Series-Specific Relation Schedule



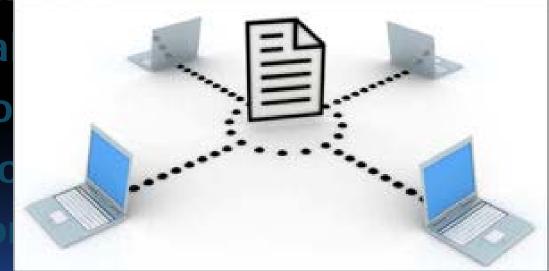


Glossary

- 2. Record Series
- 3. Schedule
- 4. Administrative Value

5. Legal Value

- 6. Fisca
- 7. Histo
- 8. Dispo
- 9. Reco



10. Series-Specific Retention Schedule



AGENCY: University of Utah

SERIES: 9467

TITLE: Accounts distribution of personnel earnings reports

DATES: 1947-

ARRANGEMENT: Chronologically by date thereunder numerically by Social Security

number.

DESCRIPTION: This series contains information referencing the amount of retirement deducted from employees paychecks. Information includes employee names; Social Security numbers; pay period ending dates; mail codes; numbers of exemptions; gross pay; FICA, federal, and state tax payments; net pay, and state retirement amounts.

RETENTION

Retain 3 years

DISPOSITION

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION

Retention and disposition for this series is authorized by Archives general schedule SG 10, Item 30.

AUTHORIZED: 07/15/2015 FORMAT MANAGEMENT

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

Microfilm master: Retain in State Records Center for 3 years and then destroy.

Microfilm duplicate: Retain in Office for 3 years and then destroy.

APPRAISAL

Administrative Fiscal

These records have administrative and fiscal value as they are used to administer programs and account for payroll deductions.

PRIMARY DESIGNATION

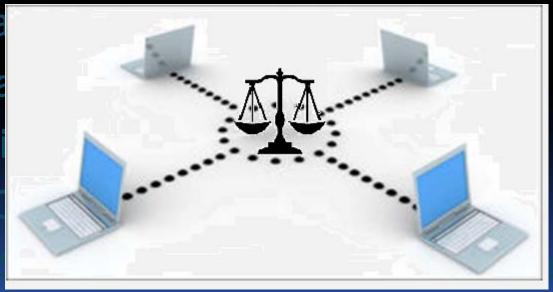
Private. 63G-2-302 (1)(f) and (2)(b) (2009)



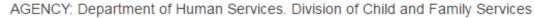
11 Record

Glossary

- 2. Record Series
- 3. Schedule
- 4. Administrative Value
- 5. Legal Value
- 6. Fiscal Va
- 7. Historica
- 8. Dispositi
- 9. Record
- 10. Series-







SERIES: 11771

TITLE: Child protective services investigation case records

DATES: 1955-

ARRANGEMENT: Alphabetical by client surname ANNUAL ACCUMULATION: 20.00 cubic feet.

DESCRIPTION: These are investigations and findings of child abuse and neglect cases. Child protective service workers use this information to determine whether or not a child is the victim of abuse or neglect. Information includes name, court actions, investigations, family information, psychiatric and psychological information, and victim information.

RETENTION

Retain 30 years.

DISPOSITION

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 24.

AUTHORIZED: 01/29/1993 FORMAT MANAGEMENT

Paper: Retain in Office for 5 years after case closes and then transfer to State Records Center. Retain in State Records Center for 25 years and then destroy.

APPRAISAL

Administrative Legal

This disposition is based on the administrative needs expressed by the agency. UCA 78-3c-3 (1992), specifies that information in these records are restricted in order to enhance and promote the recovery of victims involved in abuse and neglect cases.

PRIMARY DESIGNATION

Exempt. UCA 62A-4-513 (2008)



Glossary

- 2. Record Series
- 3. Schedule
- 4. Administrative Value
- 5. Legal Value
- 6. Fiscal Value
- 7. Historical Val
- 8. Disposition
- 9. Record Copy
- 10. Series-Spec







SERIES: 9467

TITLE: Accounts distribution of personnel earnings reports

DATES: 1947-

ARRANGEMENT: Chronologically by date thereunder numerically by Social Security

number.

DESCRIPTION: This series contains information referencing the amount of retirement deducted from employees paychecks. Information includes employee names; Social Security numbers; pay period ending dates; mail codes; numbers of exemptions; gross pay; FICA, federal, and state tax payments; net pay, and state retirement amounts.

RETENTION

Retain 3 years

DISPOSITION

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION

Retention and disposition for this series is authorized by Archives general schedule SG 10, Item 30.

AUTHORIZED: 07/15/2015 FORMAT MANAGEMENT

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

Microfilm master: Retain in State Records Center for 3 years and then destroy.

Microfilm duplicate: Retain in Office for 3 years and then destroy.

APPRAISAL

Administrative Fiscal

These records have administrative and fiscal value as they are used to administer programs and account for payroll deductions.

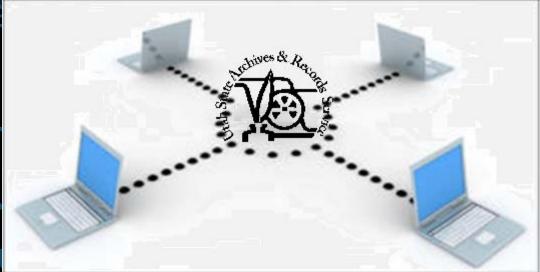
PRIMARY DESIGNATION

Private. 63G-2-302 (1)(f) and (2)(b) (2009)



Glossary

- 2. Record Se
- 3. Schedule
- 4. Administr
- 5. Legal Value
- 6. Fiscal Value



- 7. Historical Value
- 8. Disposition
- 9. Record Copy
 - 10. Series-Specific Retention Schedule



AGENCY: National Guard

SERIES: 10319

TITLE: Mexican Border Campaign muster rolls

DATES: 1916-1917.

ARRANGEMENT: By unit and rank

DESCRIPTION: This series is a record of Utah National Guard units mustered into military service during the Mexican Border Campaign of 1916-1917. It contains muster-in and muster-out rolls of Utah National Guardsmen. The muster-in rolls include the following types of information for each serviceman: name, rank, description (age, height, complexion, eye color and hair color), birthplace, occupation, marital status, residence, emergency contact, date of commission or enlistment in state service, home station or company rendezvous, and signature. The content of the muster-out rolls is similar but much abbreviated.

RETENTION

DISPOSITION

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION

These records are in Archives' permanent custody.

FORMAT MANAGEMENT

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

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

APPRAISAL

Historical

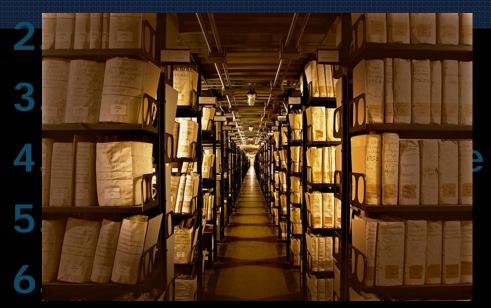
This series provides information on Utah National Guardsmen in the Mexican Border Campaign of interest to military historians and genealogists.

PRIMARY DESIGNATION

Public



Glossary



- 7. Historical Value
- 8. Disposition
- 9. Record Copy

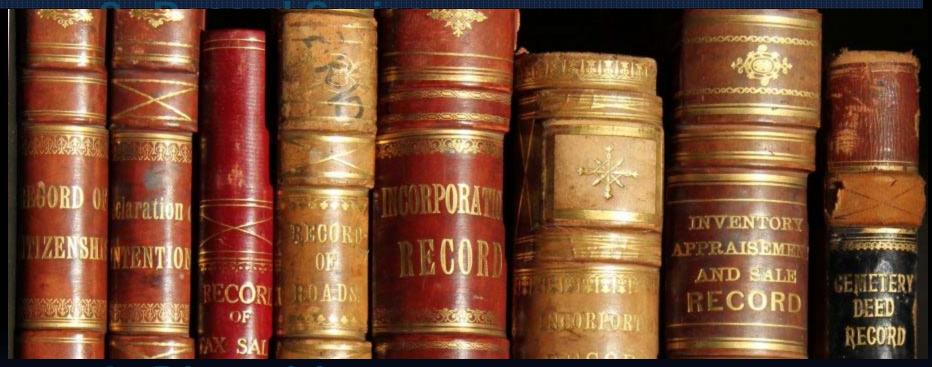


10. Series-Specific Retention Schedule



AL Record

Glossary



- 8. Disposition
- 9. Record Copy

10. Series-Specific Retention Schedule



Utah State Archives

AGENCY: Department of Administrative Services. Division of Administrative Rules

SERIES: 7192

TITLE: Administrative rules files

S: 1973-

ARRANGEMENT: Numerical by file number.

ANNUAL ACCUMULATION: 6.00 cubic feet.

DESCRIPTIO

These records support the agency's function to record the receipt of all rules submitted by state governmental agencies authorized or required by law to make rules (Utah Code 63G-3-402(1)(b)(2010) & 63G-3-102(2)(2008)). These records document the changes in administrative law governing the state as well as the final published version. These records are the official copies of the administrative rule filings submitted in accordance with the Utah Administrative Rulemaking Act, Title 63G. Records may also include materials incorporated by reference, notice of effective date, and pertinent correspondence.

RETENTION:

Retain 2 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 09/1989

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 2 years and then transfer to State Archives.

Microfilm master: Retain in State Archives permanently

Microfilm duplicate: Retain in Office permanently.

Glossary

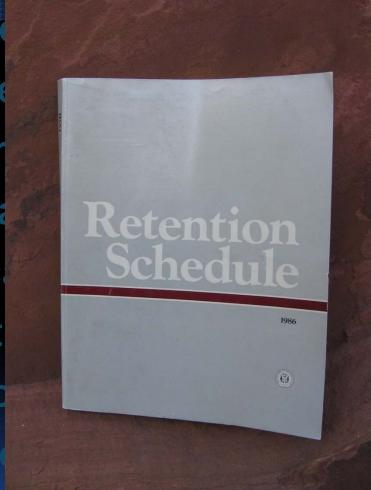
10. Series-Specific Retention Schedule



<u>impresami</u>

Glossary

- 2. Reco
- 3. Sche
- 4. Adm
- 5. Lega
- 6. Fisc
- 7. Hist
- 8. Disp
- 9. Rec



10. Series-Specific Retention Schedule



Retention Schedule Types

General Retention Schedule

HOME / RECORDS MANAGEMENT / STATE GENERAL SCHEDULE

STATE AGENCY GENERAL RECORDS RETENTION SCHEDULE

Items listed in general retention schedules identify records which may or may not exist in any given agency. They are models to follow if a governmental entity's records closely proximate the descriptions. All records are governed by either the agency's own properly adopted retention schedule or general retention schedules (63G-2-604).

- Administrative Records (1)
- Budgeting Records (2)
- Cartographic Records (3)
- Communication Records (4)
- Data Processing Records (5)
- Facility Management Records (6)
- Financial Records (7)
- Human Resource Records (11)
- Motor Vehicle Maintenance and Operation Records (9)
- Payroll Records (10)
- **** Drinting Decords (12) ORSOLETE
- Property Records (14)
- Purchasing Records (13)
- Public Affairs Records (15)
- · Security Services Records (16)
- Law Enforcement (17)

Series-specific Retention Schedule

Utah State Archives

AGENCY: Department of Administrative Services. Division of Administrative Rules

TITLE: Administrative rules files
DATES: 1973ARRANGEMENT: Numerical by file number.

ARRANGEMENT: Numerical by file number. ANNUAL ACCUMULATION: 6.00 cubic feet. DESCRIPTION:

These records support the agency's function to record the receipt of all rules submitted by state governmental agencies authorized or required by law to make rules (Utah Code 63G-3-402(1)(b)(2010) & 63G-3-102(2)(2008)). These records document the changes in administrative law governing the state as well as the final published version. These records are the official copies of the administrative rule filings submitted in accordance with the Utah Administrative Rulemaking Act, Title 63G. Records may also include materials incorporated by reference, notice of effective date and pertinent correspondence.

RETENTION:

Retain 2 years

DISPOSITION:

Transfer to the State Archives with authority to weed.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED:

09/1989

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utlah State Archives.

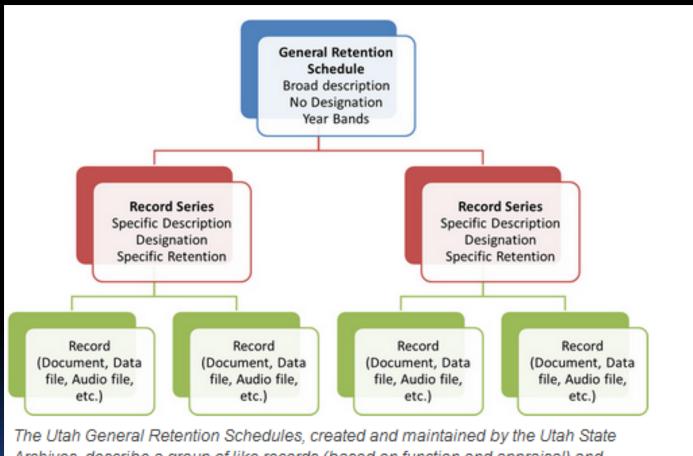
Paper: Retain in Office for 2 years and then transfer to State Archives.

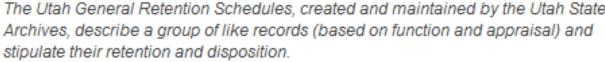
Microfilm master: Retain in State Archives permanently

Microfilm duplicate: Retain in Office permanently



Retention Schedule Types







Why the Archives makes General Schedules

HOME / RECORDS MANAGEMENT / STATE GENERAL SCHEDULE

STATE AGENCY GENERAL RECORDS RETENTION SCHEDULE

Items listed in general retention schedules identify records f MM 1 Mich may or may not exist in any given agency. They are models to follow if a governmental entity's records closely proximate the descriptions. All records are governed by either the agency's own properly adopted retention schedule or general retention schedules (63G-2-604).

- · Administrative Records (1)
- Budgeting Records (2)
- · Cartographic Records (3)
- Communication Records (4)
- Data Processing Records (5)
- Facility Management Records (6)
- Financial Records (7)
- Human Resource Records (11)
- Motor Vehicle Maintenance and Operation Records (9)
- Payroll Records (10)
- ***Printing Records (12) OBSOLETE
- Property Records (14)
- Purchasing Records (13)
- Public Affairs Records (15)
- Security Services Records (16)
- Law Enforcement (17)



1. Most of the work is done!

2. Quicker to send records to Clearfield!

3. Determining if your needs are unique.

4. Compliance



Need Feedback from Stakeholders



Email Website Blog

Records Keepers - Utah State Archives

About

Meet the Authors

Online Records Officer Certification FAO

New County Petition General Schedule





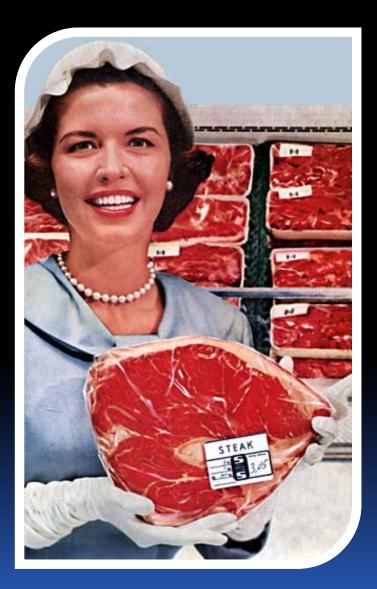


No schedules will be presented to the State Records Committee today, but we anticipate the previously posted financial schedules and the following two county schedules will be presented July

We are updating county schedule 14-32, but the retention will not change. We also propose adding a new schedule for the signature sheets related to petitions. If you have input or questions regarding these schedules, please contact Rebekkah Shaw at rshaw@utah.gov or 801-531-3851.

Petition Signature Records

These records are petition signature sheets signed by individuals wishing to add a candidate or initiatives to the election hallot. Signatures are verified to determine whether netitioners are





Determining Retention

Things to consider:

- -Documenting agency functions
- -Legal requirements
- -Other regulatory requirements
- -Fiscal requirements
- -Operational or ongoing business needs
- -Historical records



***COMMITTEE AND BOARD FILES (SG 1-6) OBSOLETE

For meeting records, please refer to the state schedule for Open Meeting Minutes and Public Materials. SG 1-59

For meeting recordings, please refer to the state schedule for Open Meeting Recordings, SG 1-65 or Closed Meeting Records, SG 1-60.

***COMMUNICATION LOGS (SG 1-15) OBSOLETE

Please refer to the state schedule for <u>Transitory Tracking Records</u>, <u>SG 1-73</u>.



Crosswalk

Our blog: recordskeepers.blog

Reflected on General Schedule page

Annual General Schedule Updates



Current drafts



Ordinances & Resolutions

 These are formal opinions and decisions made by local legislative bodies. Records include original ordinances and resolutions, codified ordinances and indexes.

Retention: Permanent. May transfer to Archives.



Election Records

- These are routine records created during elections. Information may include ballots, candidate list, returns, voter registration notices.
- Retention: 2 years after election and then destroy.
- Based on Utah Code 20A-4-202(2)(b)(2014)
 which says 22 months after the election. Utah
 Code 20A-2-308(2)(a) puts voter registration at 2
 years.



State Archives Assistance

Rebekkah Shaw, General Schedules

rshaw@utah.gov 801.531.3851

Lorianne Ouderkirk, Local Government

louderkirk@utah.gov 801.531.3860

Rosemary Cundiff, State Records Ombudsman

rcundiff@utah.gov 801.531.3858

