

General Records Retention Schedule Updates

2013 – July 2015



Published by
Division of State Archives & Records Service
August 17, 2015

August 17, 2015

Dear Reader,

Records are the memory of government. They contain information on the origin, development, and administration of public policies and programs. Records document and protect the civil, legal, and property rights of private citizens and they define government's obligations. Records are important State resources.

To help in the management of these records, the Utah State Archives has initiated a program to help state agencies create retention schedules for records in their offices. A major aid in this effort is the Utah General Retention Schedule Update. The use of this schedule will help increase productivity, reduce the spiraling costs of information management, and identify documents that will be valuable for future generations.

The success of Utah's records management program depends on the cooperation of each state employee. If you have questions about records, the Utah State Archives is ready to assist you.

Sincerely

A handwritten signature in black ink, appearing to read "Patricia Smith-Mansfield". The signature is fluid and cursive, with a large loop at the end.

Patricia Smith-Mansfield
State Archivist

Table of Contents

Letter from State Archivist	3
General Schedule Update Summary	5
State General Retention Schedule Alphabetically	7
County General Retention Schedule Alphabetically	22
Municipal General Retention Schedule Alphabetically.....	41
School District General Retention Schedule Alphabetically	61
State General Retention Schedule Numerically.....	81
County General Retention Schedule Numerically	94
Municipal General Retention Schedule Numerically	108
School District General Retention Schedule Numerically	122
<u>Download Excel File of All Tables</u>	
Glossary.....	136

The Utah General Retention Schedules are policies created and maintained by the Utah State Archives that describe a group of like records and stipulates retention and disposition. Retention is the amount of time governmental entities are required to be maintained before their disposition. Retention is established when records are scheduled. Disposition means the final stage of records management in which records are either destroyed or maintained permanently (transferred to Utah State Archives for preservation).

To create a retention schedule, a group of like records are identified and described based on functions. For example, meeting minutes are required by law to be created for all open meetings (Utah Code 52-4-203(2015)). Many governmental entities have open meetings subject to this law and therefore have created meeting minutes. The general retention schedule *Open Meeting Minutes and Public Materials* (State Agency Schedule 1-59) describes these records and specifies the retention and disposition based on their appraisal.

Appraisal is the process of determining the value and thus the disposition of records based on their value. There are four appraisal values which may be assigned:

Administrative Value — records used in the conduct of current and/or future administrative business.

Fiscal Value — records required until a financial audit is completed or financial obligations are fulfilled.

Legal Value — records containing evidence of legally enforceable rights or obligations. Also refers to retentions specified by statute, rule, or regulation.

Historical Value — records of enduring historical or other value that warrant continued preservation of records beyond the period required to transact the business of their originating agency or its successor in function.

More than one appraisal value may be assigned. Records determined to have historical value are designated in the general retention schedules as permanent. Records determined to have administrative, fiscal, or legal value have varying retention periods.

In reference to the previous example of meeting minutes, these records have an immediate administrative value because they are used in the conduct of administrative business. Meeting minutes also have historical value because they document decisions made and actions taken by a legislative body. The appraisal of historical value determines the permanent disposition of these records (State Agency Schedule 1-59).

All general retention schedules go through an established creation process which includes researching state and federal laws, soliciting input from identified stakeholders, and passing an internal review. Once a proposed general retention schedule is approved by the

stakeholders and internally, it is submitted to the State Records Committee (SRC) for consideration and posted for public review on the State Archives' website, the State Records Committee page on the Public Notice Website, and the State Archives' records analysts' blog. Proposed retention schedules are submitted to the SRC and are available for public comment at least two weeks prior to the next State Records Committee meeting. Upon approval from the State Records Committee, general retention schedules are published on the Utah State Archives' website for governmental entities to use.

The State Records Committee (SRC) has the responsibility to "review and approve schedules for the retention and disposal of records" generated by state and local governmental entities (Utah Code 63G-2-502 (2015)). Records analysts at the State Archives work to develop and update retention schedules, solicit and consider feedback from the agencies involved, and then present the schedules to the State Records Committee (SRC) for approval. Once a schedule has been approved, it is considered active, and supersedes all previous versions of that schedule. Records analysts at the State Archives then work to realign series-specific schedules to the newly-approved general schedule. If an entity wishes to maintain a record series contrary to a general retention schedule, the records officer will need to work with her/his records analyst to have a series-specific retention schedule approved by the SRC for those records.

Note that the retention provided in the general schedule is not a guideline but a requirement stating the length of time a record is to remain in agency custody. The code says, "the governmental entity shall maintain and destroy records in accordance with the retention schedule" (Utah Code 63A-12-105(3)(a)(ii)(2015)). This suggests that the legal requirement is not only to maintain records for the full length of the approved retention period, but includes a requirement to dispose of records when the approved retention period has expired.

For those governmental entities who adopt the Utah State General Retention Schedule, the retention schedules are to be applied as published (Utah Code 63A-12-105(1)&(2)(a)(2015)).

State Government Schedules

Schedule Name & Number	New or Updated	Cross-walked ¹	Obsolete	Notes
Acknowledgement Files 1-1		X		See Transitory Correspondence 1-62
Administrative Correspondence 1-63	X			Approved June 2014
Administrative Payroll Reports 10-1		X		See Payroll Post Processing Records 10-31
Administrative Policy and Program Records 1-24		X		See Policy and Procedure Records 1-70
Administrative Reference/Reading Files 1-3			X	This schedule has proven to no longer be effective.
Adverse Action Files 11-1		X		See Grievance Records 11-64

¹ "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Agency Histories 1-4		X		See Agency History Records SG 1-76
Animal Control Records 1-67	X			Approved December 2014
As-Built Construction Plans & Specifications 6-2		X		See As-Built Construction Plans and Specifications 6-14
As-Built Construction Plans & Specifications 6-14	X			Approved August 2014
Attorneys General Opinions 1-5		X		See Legal Counsel Records 1-74
Bond Official Transcripts 7-10	X			Approved December 2013
Bonds, Notes & Interest Payments 7-12	X			Approved November 2014
Bond Registration Files 7-11			X	This schedule has proven to no longer be effective.

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Cartographic Working Files 3-2			X	This schedule has proven to no longer be effective.
Closed Meeting Records 1-60	X			Approved July 2014
Collection Bonds 7-14		X		See Bonds, Notes & Interest Payments 7-12
Committee and Board Files 1-6		X		See Open Meeting Minutes & Public Materials 1-59, Open Meeting Recordings 1-65, or Closed Meeting Records 1-60
Communication Logs 1-15		X		See Transitory Tracking Records 1-73
Complaint/Informant Files 15-2		X		See Complaint Investigation Files 11-66
Complaint Investigation Files 11-66	X			Approved July 2015

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Control Files 12-1			X	General Schedules specific to one agency have been removed.
Daily Activity Records 17-3	X			Approved May 2015
Deductions & Other Earning Registers 10-3		X		See Payroll Processing Records 10-30
Departmental Recovery Reports 16-1		X		See Disaster Plan Records 16-18
Disaster Planning Files 16-2		X		See Disaster Plan Records 16-18
Disaster Planning Records 16-18	X			Approved June 2014
Documentation for Non-Permanent Databases 5-8			X	Databases should not be scheduled as a whole.
Documentation for Permanent Databases 5-9			X	Databases should not be scheduled as a whole.

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Electronic Publications 1-44		X		See Publications 1-25
Employee Awards 11-9		X		See Performance Plans & Evaluations 11-63
Employee Health & Medical Records 11-65	X			Approved September 2014
Employee Performance-Related Records 11-30		X		See Performance Plans & Evaluations 11-63
Employee Wage History Records 10-32	X			Approved July 2015
Employment History Records 11-62	X			Approved November 2014
Equal Employment Opportunity (DDO) Discrimination Complaint Case Files 11-15		X		See Complaint Investigation Files 11-66

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Executive Correspondence 1-61	X			Approved May 2014
Family Medical Leave Applications 11-57		X		See Employment Health & Medical Records 11-65
Financial Information Resources System (FIRMS) Periodic Reports 7-21			X	General Schedules specific to one agency have been removed.
Financial Information Resources System (FIRMS) Year End Reports 7-22			X	General Schedules specific to one agency have been removed.
Finding Aids 1-11		X		See Information Governance Records 1-66
Formal Opinion Records 1-75	X			Approved June 2014
Forms Files 1-13		X		See Information Governance Records 1-66

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Garnishments 10-7		X		See Payroll Processing Records 10-30
Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68	X			Approved December 2014
Grievance/Appeal Files 11-19		X		See Grievance Records 11-64
Guard Service Control Files 16-4		X		See Disaster Plan Records 16-18
Homicide, Violent Felonies & Sex Crime Investigation Files 17-2	X			Approved May 2015
Individual Health Record Files 11-22		X		See Employment Health & Medical Records 11-65
Information Governance Records 1-66	X			Approved December 2014

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Insurance Deduction Files 10-9		X		See Payroll Processing Records 10-30
Interview Records 11-23		X		See Staff Acquisition Records 11-61
Key Accountability Files 16-7		X		See Disaster Plan Records 16-18
Leave Adjustment Reports 10-10		X		See Timekeeping Records 10-29
Leave Applications 10-11		X		See Timekeeping Records 10-29
Leave Summary Report 10-13		X		See Payroll Post Processing Records 10-30
Legal Counsel Records 1-74	X			Approved June 2015
Length of Service Award Files 11-26		X		See Performance Plans & Evaluations 11-63

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Mailing Lists 1-46			X	This schedule has proven to no longer be effective.
Meeting Recordings 1-41		X		See Open Meeting Recordings 1-65 or Closed Meeting Records 1-60
Minutes 1-51		X		See Open Meeting Minutes & Public Materials 1-59
Misdemeanor & Felony Investigation Files 17-1	X			Approved May 2015
Notary Bond Files 7-28			X	General Schedules specific to one agency have been removed.
Official Employee Personnel File 11-2		X		See Employment History Records 11-62 or Performance Plans & Evaluations 11-63
Open Meeting Minutes & Public Materials 1-59	X			Approved July 2014

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Open Meeting Recordings 1-65	X			Approved July 2014
Patient and Client Case Files 1-56	X			Approved June 2013
Payroll Post Processing Records 10-31	X			Approved July 2015
Payroll Processing Records 10-30	X			Approved July 2015
Payroll Register 10-15		X		See Payroll Post Processing Records 10-31
Pending Files 1-21		X		See Transitory Tracking Records 1-73
Performance Plans & Evaluations 11-63	X			Approved November 2014

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Personnel Security Clearance Files 16-11		X		See Disaster Plan Records 16-18
Plate, Negatives, & Art Work Files 12-2			X	This schedule has proven to no longer be effective.
Policy and Procedure Records 1-70	X			Approved February 2015
Policy and Procedures Manuals 1-23		X		See Publications 1-25 or Policy and Procedure Records 1-70
Policy and Program Correspondence 1-9		X		See Executive Correspondence 1-61
Press Releases 15-8		X		See Public Relations Records 1-69
Printing Project Files 12-3			X	Format specific schedules have been removed.

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Printing Report Files 12-4			X	Format specific schedules have been removed.
Publications 1-25	X			Approved October 2013
Public Relations Records 1-69	X			Approved December 2014
Records Access Request and Appeals Files 1-34		X		See Records Access Requests and Appeals 1-64
Records Access Requests and Appeals 1-64	X			Approved June 2014
Records Amendment Request Files 1-35		X		See Records Access Requests and Appeals 1-64
Records Management Files 1-37		X		See Information Governance Records 1-66
Records Transfer Sheets 1-26		X		See Information Governance Records 1-66

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Recruitment Files 11-43		X		See Staff Acquisition Records 11-61
Retirement Benefits Assistance Files 10-17		X		See Payroll Processing Records 10-30
Retirement Files 10-18		X		See Employee Wage History Records 10-32
Request for Proposal Records 13-17	X			Approved June 2015
Right of Way Records 14-5	X			Approved June 2015
Savings Bond Purchase Summary 10-20		X		See Payroll Processing Records 10-30
Staff Acquisition Records 11-61	X			Approved May 2015

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
State General Obligation Bonds 7-36		X		See Bond Transcripts 7-10
State Revenue Bonds 7-37		X		See Bond Transcripts 7-10
Stores Accounting Files 7-38			X	General Schedules specific to one agency have been removed.
Successful Bids & Proposals Files 13-12		X		See Request for Proposals 13-17
Suicide Investigation Records 17-4	X			Approved May 2015
Taxable Wage Earning Reports 10-24		X		See Payroll Processing Records 10-30
Technical Reference Files 1-29			X	This schedule has proven to no longer be effective.
Time & Attendance Reports 10-25		X		See Timekeeping Records 10-29

Schedule Name & Number	New or Updated	Cross-walked¹	Obsolete	Notes
Timekeeping Records 10-29	X			Approved July 2015
Transitory Correspondence 1-47		X		See Transitory Correspondence 1-62
Transitory Correspondence 1-62	X			Approved May 2014
Transitory Files 1-30			X	This schedule has proven to no longer be effective.
Vital Records 1-72	X			Approved February 2015
Worker's Compensation Case Files 11-35	X			Approved September 2014
Working Files 1-33	X			Approved June 2013

County Government Schedules

Schedule Name & Number	New or Updated	Cross-walked ²	Obsolete	Notes
Activity Reports 20-1		X		See state schedule Animal Control Records 1-67
Adding Machine Tapes 5-31			X	Format specific schedules have been removed.
Administrative Correspondence 1-48		X		See state schedule Administrative Correspondence 1-63
Administrative Payroll Reports 7-1		X		See state schedule Payroll Post Processing Records 10-31
Adverse Action Files 8-1		X		See state schedule Grievance Records 11-64
Agenda 1-2		X		See state schedule Open Meeting Minutes and Public Materials 1-59

² "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Animal Adoption Agreements 20-2		X		See state schedule Animal Control Records 1-67
Animal Citations 20-3		X		See state schedule Animal Control Records 1-67
Animal Master Report Cards 20-4		X		See state schedule Animal Control Records 1-67
Annual Program Reports 25-100		X		See state schedule Publications 1-25
Annual Report 30-1		X		See state schedule Publications 1-25
Annual Reports 1-3		X		See state schedule Publications 1-25
Birth Registers 14-4		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
Bite Reports 20-5		X		See state schedule Animal Control Records 1-67

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Board of Adjustment Minutes and Index 28-4		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Board of Health Minutes 25-6			X	See state schedule Open Meeting Minutes and Public Materials 1-59
Bond Issue Files 2-2		X		See state schedule Bond Transcripts 7-10
Bond Redemption & Destruction Certificates 2-3		X		See state schedule Bonds, Notes & Interest Payments 7-12
Bond Redemption Registers 2-4		X		See state schedule Bonds, Notes & Interest Payments 7-12
Bond Registration Files 2-5		X		See state schedule Bonds, Notes & Interest Payments 7-12
Bonds, Notes & Coupons Paid Files 2-6		X		See state schedule Bonds, Notes & Interest Payments 7-12

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Burial-Transit Permit Applications 14-44		X		See county schedule Cemetery Management Records 14-44
Communicable Disease Case Files Index 25-19			X	General Schedules specific to one agency have been removed.
Communicable Disease Case Files 25-20			X	General Schedules specific to one agency have been removed.
Communicable Disease Control Program Files 25-21			X	General Schedules specific to one agency have been removed.
Complaint Records 20-6		X		See state schedule Animal Control Records 1-67

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Controlled Substances Euthanasia License Records 20-8		X		See state schedule Animal Control Records 1-67
Controlled Substances Euthanasia Log 20-9		X		See state schedule Animal Control Records 1-67
County Fair Board Minutes 27-4		X		See state schedule Open Meeting Minutes & Public Materials 1-59
County Histories 1-31		X		See state schedule Agency History Records 1-76
Daily Activity Report 16-13		X		See state schedule Daily Activity Records 17-3
Daily Activity Schedules 1-6			X	This schedule has proven to no longer be effective.

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Death Registers 14-12		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
Death Certificates 25-24		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
Deductions & Other Earnings Registers 7-3		X		See state schedule Payroll Processing Records 10-30
Disaster Planning Files 10-1		X		See state schedule Disaster Plan Records 16-18
Dog License Records 20-10		X		See state schedule Animal Control Records 1-67
Eligibility Register 8-4		X		See state schedule Staff Acquisition Records 11-61
Employee Earnings History Files 7-4		X		See state schedule Payroll Processing Records 10-30 or Employee Wage History Records 10-32

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Employee History Card 8-5		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
Environmental/ Occupational Investigation case Files 25-32			X	General Schedules specific to one agency have been removed.
Fetal Death Certificates 25-99		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
Executive/Elected Officials Calendars 1-8			X	As described, these are not records according to GRAMA.
Felony Investigation Case Files 16-20		X		See state schedule Misdemeanor and Felony Investigation Files 17-1

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Finding Aids 1-10		X		See state schedule Information Governance Records 1-66
Flextime Attendance Records 7-5		X		See state schedule Timekeeping Records 10-29
Garnishment Records 7-6		X		See state schedule Payroll Processing Records 10-30
General Obligation Bonds 2-7		X		See state schedule Bond Transcripts 7-10
Government Records Access and Management Act (GRAMA) Access Requests 1-41		X		See state schedule Records Access Requests and Appeals 1-64

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Government Records Access & Management Act (GRAMA) County Appeals Case Files 1-40		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
Government Records Access and Management Act (GRAMA) State Appeals Case Files 1-42		X		See state schedule Records Access Requests and Appeals 1-64
Green Thumb Program Files 8-13			X	The Green Thumb Program is obsolete.

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Grievance & Disciplinary Files 8-14		X		See state schedule Grievance Records 11-64
Homicide & Theft of Public Funds Case Files 16-26		X		See state schedule Homicide, Violent Felonies & Sex Crime Investigation Files 17-2
Housekeeping Files 1-12		X		See state schedule Transitory Tracking Records 1-73
Income Tax Exemptions & Withholding Files 7-7		X		See state schedule Payroll Processing Records 10-30
Incoming Document Log 1-13		X		See state schedule Information Governance Records 1-66

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Individual Authorized Allotments Files 7-8		X		See state schedule Payroll Processing Records 10-30
Insurance Deduction Files 7-9		X		See state schedule Payroll Processing Records 10-30
Interview Records 8-5		X		See state schedule Grievance Records 11-64
Job Opening Files 8-16		X		See state schedule Staff Acquisition Records 11-61
Leave Adjustment Report 7-10		X		See state schedule Timekeeping Records 10-29
Leave Application Files 7-11		X		See state schedule Timekeeping Records 10-29
Leave Data Files 7-12		X		See state schedule Timekeeping Records 10-29

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Marriage License Applications 14-24		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
Marriage License Register 14-26		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
Marriage Licenses 14-25		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
Master Logs 20-11		X		See state schedule Animal Control Records 1-67
Medical & Dental Insurance Claim Files 10-6		X		See state schedule Employee Health & Medical Records 11-65

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Meeting Recordings 1-44		X		See state schedule Open Meeting Minutes & Public Materials 1-59, Open Meeting Recordings 1-65, or Closed Meeting Records 1-60
Merit Employee Performance-Related Records 8-18		X		See state schedule Performance Plans & Evaluations 11-63
Minutes 1-15		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Misdemeanor Case Files 16-37		X		See state schedule Misdemeanor & Felony Investigation Files 17-1
Monthly Cemetery Death Report 25-60		X		See county schedule Cemetery Management Records 14-44

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Morbidity Data Summary Reports 25-66		X		General Schedules specific to one agency have been removed.
Opinions 12-7		X		See state schedule Formal Opinion Records 1-75
Organizational Files 1-16		X		See state schedule Agency History Records 1-76
Payroll Register 7-13		X		See state schedule Employee Wage History Records 10-32
Pending Files 1-17		X		See state schedule Transitory Tracking Records 1-73
Personal Injury Files 8-19		X		See state schedule Worker's Compensation Files 11-35

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Personnel Files 8-20		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
Personnel Requisition & Analysis Files 8-21		X		See state schedule Staff Acquisition Records 11-61
Policies and Procedure Manuals 1-18		X		See state schedule Publications 1-25
Policy and Program Correspondence 1-7		X		See state schedule Executive Correspondence 1-61
Position Description Files 8-22		X		See state schedule Staff Acquisition Records 11-61
Pre-Employment Tests 8-29		X		See state schedule Staff Acquisition Records 11-61

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Press Release Files 1-20		X		See state schedule Public Relations Records 1-69
Publications 1-22		X		See state schedule Publications 1-25
Public Relations Files 1-23		X		See state schedule Public Relations Records 1-69
Reading or Chronological Files 1-24			X	This schedule has proven to no longer be effective.
Records Transfer Sheets 1-38		X		See state schedule Information Governance Records 1-66
Recruitment Files 8-25		X		See state schedule Staff Acquisition Records 11-61
Requests for Proposals 9-6		X		See state schedule Requests for Proposal Records 13-17

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Retirement Benefits Assistance Files 7-14		X		See state schedule Timekeeping Records 10-29
Retirement Files 7-15		X		See state schedule Timekeeping Records 10-29
Revenue Bonds 2-8		X		See state schedule Bond Transcripts 7-10
Routine Control Files 1-26			X	This schedule has proven to no longer be effective.
Saving Bond Purchase Records 7-19		X		See state schedule Payroll Processing Records 10-30
Saving Bond Purchase Summary Report 7-20		X		See state schedule Payroll Processing Records 10-30

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Sexually Transmitted Disease Program Files 25-79			X	General Schedules specific to one agency have been removed.
State Drivers' License Master License Report 14-36			X	General Schedules specific to one agency have been removed.
Successful Bid Proposals Files 9-7		X		See state schedule Request for Proposal Records 13-17
Taxable Wage Earning Reports 7-16		X		See state schedule Payroll Processing Records 10-30
Technical Reference Files 1-28			X	This schedule has proven to no longer be effective.
Telephone Message Registers 1-36		X		See state schedule Transitory Tracking Records 1-73

Schedule Name & Number	New or Updated	Cross-walked	Obsolete	Notes
Time Sheets 7-17		X		See state schedule Timekeeping Records 10-29
Telephone Messages 1-37		X		See state schedule Transitory Tracking Records 1-73
Transitory Correspondence 1-34		X		See state schedule Transitory Correspondence 1-62
Unopened Bids Proposals Files 9-8		X		See state schedule Request for Proposal Records 13-17
Unsuccessful Bids and Proposals Files 9-9		X		See state schedule Request for Proposal Records 13-17
Vital Records 14-42	X			Approved February 2015
Word Processing Files 1-29			X	This schedule has proven to no longer be effective.
Working Papers 1-30		X		See state schedule Working Files 1-33

Municipal Government Schedules

Schedule Name & Number	New or Updated	Cross-walked ³	Obsolete	Notes
Activity Reports 14-1		X		See state schedule Animal Control Records 1-67
Adding Machine Tapes 5-31			X	Format specific schedules have been removed.
Administrative Payroll Reports 8-1		X		See state schedule Payroll Post Processing Records 10-31
Administrative Correspondence 1-49		X		See state schedule Administrative Correspondence 1-63
Adverse Action Files 9-16		X		See state schedule Grievance Records 11-64
Airport Authority Board Minutes 13-9		X		See state schedule Open Meeting Minutes and Public Materials 1-59

³ "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Airport Certification Specification Manuals 13-12		X		See state schedule Publications 1-25
Animal Adoption Agreements 14-8		X		See state schedule Animal Control Records 1-67
Animal Citations 14-2		X		See state schedule Animal Control Records 1-67
Animal Master Report Cards 14-3		X		See state schedule Animal Control Records 1-67
Annual Report 25-2		X		See state schedule Publications 1-25
Annual Report 1-2		X		See state schedule Publications 1-25
Annual Report 24-1		X		See state schedule Publications 1-25
As-Built Construction Drawings 22-9		X		See state schedule As-built Construction Plans & Specifications 6-14

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Bite Reports 14-9		X		See state schedule Animal Control Records 1-67
Board of Adjustment Minutes and Indexes 20-3		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Board of Director's Minutes 25-3		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Certificates of Perpetual Care 17-1		X		See county schedule Burial Records 14-43
City Histories 1-14		X		See state schedule Agency History Records 1-76
Complaint Records 14-4		X		See state schedule Animal Control Records 1-67

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Comprehensive Employment and Training Act (CETA) Personnel Files 9-3			X	This federally funded employment program is obsolete.
Controlled Substances Euthanasia License Records 14-11		X		See state schedule Animal Control Records 1-67
Controlled Substances Euthanasia Log 14-12		X		See state schedule Animal Control Records 1-67
Council Agenda 18-7		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Council Minutes 18-23		X		See state schedule Open Meeting Minutes & Public Materials 1-59

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Daily Activity Report 21-2		X		See state schedule Daily Activity Records 17-3
Daily Field Reports 14-5		X		See state schedule Animal Control Records 1-67
Deductions & Other Earnings Registers 8-3		X		See state schedule Payroll Processing Records 10-30
Deed Register/ Payment Records 17-2		X		See county schedule Burial Records 14-43
Deeds 17-3		X		See county schedule Burial Records 14-43
Disaster Planning Files 11-1		X		See state schedule Disaster Plan Records 16-18
Dog License Records 14-6		X		See state schedule Animal Control Records 1-67

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Eligibility Certificates 9-2		X		See state schedule Staff Acquisition Records 11-61
Eligibility Register 9-4		X		See state schedule Staff Acquisition Records 11-61
Employee Applications (Hired) 9-1		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
Employee Applications (Not Hired) 9-20		X		See state schedule Staff Acquisition Records 11-61
Employee Earnings History Files 8-4		X		See state schedule Employee Wage History Records 10-32
Employee History Card 9-6		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Employee Warning Files 9-19		X		See state schedule Complaint Investigation Files 11-66
Employment Eligibility Records (I-9) 9-34		X		See state schedule Employment History Records 11-62
Felony Investigation Case Files 21-57		X		See state schedule Misdemeanor and Felony Investigation Files 17-1
Finding Aids 1-5		X		See state schedule Information Governance Records 1-66
Flextime Attendance Records 8-17		X		See state schedule Timekeeping Records 10-29
Formal Legal Opinions 15-4		X		See state schedule Formal Opinion Records 1-75
Garnishment Records 8-5		X		See state schedule Payroll Processing Records 10-30

Schedule Name & Number	New or Updated	Cross-walked ³	Obsolete	Notes
General Administrative Records 1-6			X	This schedule has proven to be ineffective.
Government Records Access and Management Act (GRAMA) Access Requests 1-29		X		See state schedule Records Access Requests and Appeals 1-64
Government Records Access and Management Act (GRAMA) Municipal Appeals Case Files 1-30		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Government Records Access and Management Act (GRAMA) State Appeals Case Files 1-31		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
Grave Opening Orders 17-4		X		See county schedule Cemetery Management Records 14-44
Grievance & Disciplinary Files 9-9		X		See state schedule Grievance Records 11-64
Homicide & Theft of Public Funds Case Files 21-58		X		See state schedule Homicide, Violent Felonies & Sex Crime Investigation Files 17-2
Housekeeping Files 1-7		X		See state schedule Transitory Tracking Records 1-73

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Hydrograph Annual Reports 22-36		X		See state schedule Publications 1-25
Income Tax Exemptions & Withholding Files 8-6		X		See state schedule Payroll Processing Records 10-30
Incoming Document Log 1-32		X		See state schedule Information Governance Records 1-66
Informal Legal Opinions 15-11		X		See state schedule Legal Counsel Records 1-74
Individual Authorized Allotments Files 8-7		X		See state schedule Payroll Processing Records 10-30
Insurance Deduction Files 8-8		X		See state schedule Payroll Processing Records 10-30

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Interment Reports 17-10		X		See county schedule Cemetery Management Records 14-44
Interview Records 9-25		X		See state schedule Staff Acquisition Records 11-61
Job Opening Files 9-10		X		See state schedule Staff Acquisition Records 11-61
Leave Adjustment Report 8-18		X		See state schedule Timekeeping Records 10-29
Leave Application Files 8-9		X		See state schedule Timekeeping Records 10-29
Leave Data Files 8-10		X		See state schedule Timekeeping Records 10-29
Lot Books/ Files 17-6		X		See county schedule Burial Records 14-43

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Mailing Lists 1-12			X	This schedule has proven to no longer be effective.
Map Books 17-7		X		See county schedule Burial Records 14-43
Master Logs 14-7		X		See state schedule Animal Control Records 1-67
Meeting Agenda 1-1		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Meeting Recordings 1-45		X		See state schedule Open Meeting Minutes & Public Materials 1-59, Open Meeting Recordings 1-65, or Closed Meeting Records 1-60
Merit Employee Performance-Related Records 9-27		X		See state schedule Performance Plans & Evaluations 11-63

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Minutes 1-13		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Minutes of the Board of Appeals and Examiners 16-10		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Minutes of the Board of Equalization and Review 12-1		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Misdemeanor Case Files 21-6		X		See state schedule Misdemeanor & Felony Investigation Files 17-1
Municipal Officers' and Employees' Ethics Act Records 9-36		X		See state schedule Complaint Investigation Files 11-66

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Organizational Files 1-15		X		See state schedule Agency History Records 1-76
Payroll Files 8-11		X		See state schedule Timekeeping Records 10-29, Payroll Processing Records 10-30, Employee Wage History Records 10-32
Payroll Register 8-12		X		See state schedule Employee Wage History Records 10-32
Pending Files 1-35		X		See state schedule Transitory Tracking Records 1-73
Personal Injury Files 9-11		X		See state schedule Worker's Compensation Files 11-35
Personnel Files 9-12		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Personnel Requisition & Analysis Files 9-28		X		See state schedule Staff Acquisition Records 11-61
Planning Commission Minutes 20-4		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Plot Index Books/ Files 17-8		X		See county schedule Burial Records 14-43
Police In-car Video Recordings 21-64		X		See state schedule Daily Activity Records 17-3
Policies and Procedure Manuals 1-16		X		See state schedule Publications 1-25
Policy and Program Correspondence 1-8		X		See state schedule Executive Correspondence 1-61

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Position Description Files 9-13		X		See state schedule Staff Acquisition Records 11-61
Position Survey Files 9-14		X		See state schedule Staff Acquisition Records 11-61
Pre-Employment Tests 9-38		X		See state schedule Staff Acquisition Records 11-61
Publications 1-21		X		See state schedule Publications 1-25
Public Relations Files 1-19		X		See state schedule Public Relations Records 1-69
Public Release Files 1-20		X		See state schedule Public Relations Records 1-69
Reading or Chronological Files 1-22			X	This schedule has proven to no longer be effective.

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Records Transfer Sheets 1-38		X		See state schedule Information Governance Records 1-66
Recruitment Files 9-30		X		See state schedule Staff Acquisition Records 11-61
Requests for Proposals 10-9		X		See state schedule Requests for Proposal Records 13-17
Retirement Benefits Assistance Files 8-19		X		See state schedule Timekeeping Records 10-29
Retirement Files 8-13		X		See state schedule Payroll Processing Records 10-30
Routine Control Files 1-23			X	This schedule has proven to no longer be effective.
Saving Bond Purchase Records 8-20		X		See state schedule Payroll Processing Records 10-30

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Saving Bond Purchase Summary Report 8-21		X		See state schedule Payroll Processing Records 10-30
State Library Annual Report 25-18			X	General Schedules specific to one agency have been removed.
Successful Bid Proposals Files 10-2		X		Request for Proposal Records 13-17
System Studies Supporting Files 1-46		X		See state schedule Working Files 1-33
Taxable Wage Earning Reports 8-22		X		See state schedule Payroll Processing Records 10-30
Technical Reference Files 1-26			X	This schedule has proven to no longer be effective.
Telephone Message Registers 1-40		X		See state schedule Transitory Tracking Records 1-73

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Telephone Messages 1-41		X		See state schedule Transitory Tracking Records 1-73
Time Sheets 8-14		X		See state schedule Timekeeping Records 10-29
Transitory Correspondence 1-42		X		See state schedule Transitory Correspondence 1-62
Unopened Bids Proposals Files 10-10		X		See state schedule Request for Proposal Records 13-17
Unsuccessful Bids and Proposals Files 10-11		X		See state schedule Request for Proposal Records 13-17
Water Consumption Annual Reports 22-38		X		See state schedule Publications 1-25

Schedule Name & Number	New or Updated	Cross-walked³	Obsolete	Notes
Worker's Compensation Claim Files 8-16		X		See state schedule Worker's Compensation Files 11-35
Working Files 1-44		X		See state schedule Working Files 1-33

School District Schedules

Schedule Name & Number	New or Updated	Cross-walked ⁴	Obsolete	Notes
Administrative Payroll Reports 6-1		X		See state schedule Payroll Post Processing Records 10-31
Administrative Correspondence 1-37		X		See state schedule Administrative Correspondence 1-63
Agenda 1-2		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Attendance 17-26	X			Approved August 2013
Attendance Records 19-4		X		See school district schedule Attendance 17-26
Attendance Summary Report 19-5		X		See school district schedule Attendance 17-26

⁴ "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Applied Technology Rollbooks 17-16		X		See state schedule Publications 1-25
Board Agenda 15-1		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Board Exhibit Files 15-5		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Board Meeting Tape Recordings 15-7		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Board Minutes 15-2		X		See state schedule Open Meeting Minutes and Public Materials 1-59
Bond Redemption Registers 2-3		X		These records are no longer created by school districts.
Certified Employee Contracts 14-11		X		See state schedule Employment History Records 11-62

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Certified Personnel Files 14-1		X		See state schedule Employment History Records 11-62, or Performance Plans & Evaluations 11-63
Classified Employee History Card 14-4		X		See state schedule Employment History Records 11-62, or Performance Plans & Evaluations 11-63
Counselor's Student Files 19-6		X		See school district schedule Discipline 17-30
Court Ordered Community Service Files 17-21		X		See school district schedule Discipline 17-30
Deduction Annuity Authorization Files 6-3		X		See state schedule Payroll Processing Records 10-30

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Deduction Authorization Files 6-4		X		See state schedule Payroll Processing Records 10-30
Deductions & Other Earnings Registers 6-5		X		See state schedule Payroll Processing Records 10-30
Denied Requests Internet Log Files 1-35		X		See state schedule Transitory Tracking Records 1-73
Directories 1-3		X		See state schedule Publications 1-25
Discipline 17-30	X			Approved August 2013
Document Log 1-4		X		See state schedule Transitory Tracking Records 1-73
Eligibility Register 14-22		X		See state schedule Staff Acquisition Records 11-61

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Employee Applications (Not Hired) 14-23		X		See state schedule Staff Acquisition Records 11-61
Employee Earnings History Files 6-7		X		See state schedule Payroll Processing Records 10-30, Payroll Post Processing Records 10-31, or Employee Wage History Records 10-32
Employment Eligibility Records (I-9) 14-7		X		See state schedule Employment History Records 11-62
Enrollment and Registration 17-27	X			Approved August 2013
Family Medical Leave Applications 14-16		X		See state schedule Employee Health & Medical Records 11-65

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Finding Aids 1-8		X		See state schedule Information Governance Records 1-66
Five Year Leave Data Sheet 6-8		X		See state schedule Payroll Post Processing Records 10-31 or Employee Wage History Records 10-32
Garnishment Records 6-9		X		See state schedule Payroll Processing Records 10-30, or Payroll Post Processing Records 10-31
Gifted and Talented Student Tests 19-60		X		See school district schedule Performance and Testing 17-29
Government Records Access and Management Act (GRAMA) Access Requests 1-9		X		See state schedule Records Access Requests and Appeals 1-64

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Government Records Access and Management Act (GRAMA) School District Appeals Case Files 1-10		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
Government Records Access and Management Act (GRAMA) State Appeals Case Files 1-11		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
Grade Sheets 19-20		X		See school district schedule Performance and Testing 17-29
Graduation and Transcripts 17-32	X			Approved August 2013

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Grievance & Disciplinary Files 14-27		X		See state schedule Grievance Records 11-64, or Complaint Investigation Files 11-66
Health and Accident Insurance Records 8-3		X		See state schedule Employee Health and Medical Records 11-65
Home Excuse Files 19-23		X		See school district schedule Permission and Passes 17-31
Home-school Applications 17-8		X		See school district schedule Enrollment and Registration 17-27
Housekeeping Files 1-12		X		See state schedule Transitory Tracking Records 1-73
Income Tax Exemptions & Withholding Files 6-10		X		See state schedule Payroll Processing Records 10-30

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Individual Authorized Allotments Files 6-11		X		See state schedule Payroll Processing Records 10-30
Insurance Deduction Files 6-12		X		See state schedule Payroll Processing Records 10-30
Internet Access Logs 1-36		X		See state schedule Transitory Tracking Records 1-73
Interview Records 14-28		X		See state schedule Staff Acquisition Records 11-61
Job Descriptions 14-17		X		See state schedule Staff Acquisition Records 11-61
Job Opening Files 14-29		X		See state schedule Staff Acquisition Records 11-61
Leave Adjustment Report 6-13		X		See state schedule Timekeeping Records 10-29

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Leave Application Files 6-14		X		See state schedule Timekeeping Records 10-29
Leave Data Files 6-15		X		See state schedule Timekeeping Records 10-29
Literary Publications 19-24		X		See state schedule Publications 1-25
Medical & Dental Insurance Claim Files 8-7		X		See state schedule Employee Health & Medical Records 11-65
Medical Files 14-5		X		See state schedule Employee Health & Medical Records 11-65
Medical Log Records 17-28	X			Approved August 2013

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Medication Administration and Dispensing Records 19-29		X		See school district schedule Medical Log Records 17-28
Minutes 1-15		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Monthly Payroll Deduction Billings 6-16		X		See state schedule Payroll Processing Records 10-30
Non-Utah Resident Student Files 17-7		X		See school district schedule Enrollment and Registration 17-27
Official Transcripts 17-3		X		See school district schedule Graduation and Transcripts 17-32
Organizational Files 1-17		X		See state schedule Agency History Records 1-76

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Out-of-District-Boundary Application 17-9		X		See school district schedule Enrollment and Registration 17-27
Payroll Absence Summary Report 6-17		X		See state schedule Payroll Post Processing Records 10-31
Payroll Register 6-18		X		See state schedule Payroll Post Processing Records 10-31
Payroll Report 6-26		X		See state schedule Timekeeping Records 10-29
Pending Files 1-18		X		See state schedule Transitory Tracking Records 1-73
Performance and Testing 17-29	X			Approved August 2013
Performance Related Records 14-30		X		See state schedule Performance Plans & Evaluations 11-63

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Permission and Passes 17-31	X			Approved August 2013
Personnel Action Records 6-20		X		See state schedule Timekeeping Records 10-29
Policies and Procedure Manuals 1-20		X		See state schedule Publications 1-25
Policy and Program Correspondence 1-6		X		See state schedule Executive Correspondence 1-61
Prescribed Medication Records 17-5		X		See school district schedule Medical Log Records 17-28
Press Release Files 1-22		X		See state schedule Public Relations Records 1-69
Publications 1-24		X		See state schedule Publications 1-25

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Pupil Transportation Permission Slip 19-35		X		See school district schedule Permission and Passes 17-31
Reading or Chronological Files 1-25			X	This schedule has proven to no longer be effective.
Receiving Slips 7-10		X		See state schedule Transitory Tracking Records 1-73
Records Transfer Sheets 1-26		X		See state schedule Information Governance Records 1-66
Recruitment Files 14-36		X		See state schedule Staff Acquisition Records 11-61
Requests for Proposals 7-11		X		See state schedule Requests for Proposal Records 13-17
Retirement Files 6-21		X		See state schedule Payroll Processing Records 10-30

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Retirement Reports 6-22		X		See state schedule Payroll Post Processing Records 10-31
Routine Control Records 1-27			X	See state schedule Transitory Tracking Records 1-73
School Bulletins 19-41		X		See state schedule Transitory Correspondence 1-62
School Choice Applications 17-11		X		See school district schedule Enrollment and Registration 17-27
School Handbook 19-42		X		See state schedule Publications 1-25
School Newspapers 19-44		X		See state schedule Publications 1-25
Student Attendance Class Rolls 17-1		X		See school district schedule Attendance 17-26

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Student Class Schedules 19-47		X		See school district schedule Enrollment and Registration 17-27
Student Cumulative Files 17-2		X		See school district schedule Performance and Testing 17-29
Student Discipline Files 19-48		X		See school district schedule Discipline 17-30
Student Dropout Annual Report 9-6			X	General Schedules specific to one agency have been removed.
Student Enrollment Registration Records 19-49		X		See school district schedule Enrollment and Registration 17-27
Student Executive Board Minutes 17-24		X		See state schedule Open Meeting Minutes & Public Materials 1-59
Student History 17-25	X			Approved August 2013

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Student Registration Records 19-52		X		See school district schedule Enrollment and Registration 17-27
Student Report Cards 19-53		X		See school district schedule Performance and Testing 17-29
Student Withdrawal Records 19-54		X		See school district schedule Enrollment and Registration 17-27
Successful Bid Proposals Files 7-14		X		Request for Proposal Records 13-17
Taxable Wage Earning Reports 6-23		X		See state schedule Payroll Processing Records 10-30
Technical Reference Files 1-30			X	See state schedule Transitory Tracking Records 1-73
Telephone Message Registers 1-31		X		See state schedule Transitory Tracking Records 1-73

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Time Sheets 6-24		X		See state schedule Timekeeping Records 10-29
Telephone Messages 1-32		X		See state schedule Transitory Tracking Records 1-73
Transitory Correspondence 1-1		X		See state schedule Transitory Correspondence 1-62
Transportation Allowance Applications 19-56		X		See school district schedule Permission and Passes 17-31
University Recommendation Teacher Packets 14-18		X		See state schedule Staff Acquisition Records 11-61
Unopened Bids Proposals Files 7-16		X		See state schedule Request for Proposal Records 13-17

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Unsuccessful Bids and Proposals Files 7-17		X		See state schedule Request for Proposal Records 13-17
Vendor List 7-18			X	This schedule has proven to no longer be effective.
Worker's Compensation Employee's First Injury Report 8-10		X		See state schedule Worker's Compensation Files 11-35
Worker's Compensation Employee's First Injury Report 19-58		X		See state schedule Worker's Compensation Files 11-35
Working Case Files 1-34		X		See state schedule Working Files 1-33
Yearbooks 19-59		X		See state schedule Publications 1-25

Schedule Name & Number	New or Updated	Cross-walked⁴	Obsolete	Notes
Young Mothers Applications 17-10		X		See school district schedule Enrollment and Registration 17-27

State Schedules in Numerical Order:

	Schedule Name	New or Updated	Cross-walked ⁵	Obsolete	Notes
1-1	Acknowledgement Files		X		See Transitory Correspondence 1-62
1-3	Administrative Reference/Reading Files			X	This schedule has proven to no longer be effective.
1-4	Agency Histories		X		See Agency History Records 1-76
1-5	Attorneys General Opinions		X		See Legal Counsel Records 1-74
1-6	Committee and Board Files		X		See Open Meeting Minutes & Public Materials 1-59, Open Meeting Recordings 1-65, or Closed Meeting Records 1-60
1-9	Policy and Program Correspondence		X		See Executive Correspondence 1-61
1-11	Finding Aids		X		See Information Governance Records 1-66

⁵ "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
1-13	Forms Files		X		See Information Governance Records 1-66
1-15	Communication Logs		X		See Transitory Tracking Records 1-73
1-21	Pending Files		X		See Transitory Tracking Records 1-73
1-23	Policy and Procedures Manuals		X		See Publications 1-25 or Policy and Procedure Records 1-70
1-24	Administrative Policy and Program Records			X	See Policy and Procedure Records 1-70
1-25	Publications	X			Approved October 2013
1-26	Records Transfer Sheets		X		See Information Governance Records 1-66
1-29	Technical Reference Files			X	This schedule has proven to no longer be effective.
1-30	Transitory Files			X	This schedule has proven to no longer be effective.
1-33	Working Files	X			Approved June 2013

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
1-34	Records Access Request and Appeals Files		X		See Records Access Requests and Appeals 1-64
1-35	Records Amendment Request Files		X		See Records Access Requests and Appeals 1-64
1-37	Records Management Files		X		See Information Governance Records 1-66
1-41	Meeting Recordings		X		See Open Meeting Recordings 1-65 or Closed Meeting Records 1-60
1-44	Electronic Publications		X		See Publications 1-25
1-46	Mailing Lists			X	This schedule has proven to no longer be effective.
1-47	Transitory Correspondence		X		See Transitory Correspondence 1-62
1-51	Minutes		X		See Open Meeting Minutes & Public Materials 1-59
1-56	Patient and Client Case Files	X			Approved June 2013

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
1-59	Open Meeting Minutes & Public Materials	X			Approved July 2014
1-60	Closed Meeting Records	X			Approved July 2014
1-61	Executive Correspondence	X			Approved May 2014
1-62	Transitory Correspondence	X			Approved May 2014
1-63	Administrative Correspondence	X			Approved June 2014
1-64	Records Access Requests and Appeals	X			Approved June 2014
1-65	Open Meeting Recordings	X			Approved July 2014
1-66	Information Governance Records	X			Approved December 2014
1-67	Animal Control Records	X			Approved December 2014

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
1-68	Government Records Access and Management Act (GRAMA) Appeals Case Files	X			Approved December 2014
1-69	Public Relations Records	X			Approved December 2014
1-70	Policy and Procedure Records	X			Approved February 2015
1-72	Vital Records	X			Approved February 2015
1-74	Legal Counsel Records	X			Approved June 2015
1-75	Formal Opinion Records	X			Approved June 2014
3-2	Cartographic Working Files			X	This schedule has proven to no longer be effective.
5-8	Documentation for Non-Permanent Databases			X	Databases should not be scheduled as a whole.

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
5-9	Documentation for Permanent Databases			X	Databases should not be scheduled as a whole.
6-2	As-Built Construction Plans & Specifications		X		See As-Built Construction Plans and Specifications 6-14
6-14	As-Built Construction Plans & Specifications	X			Approved August 2014
7-10	Bond Official Transcripts	X			Approved December 2013
7-11	Bond Registration Files			X	This schedule has proven to no longer be effective.
7-12	Bonds, Notes & Interest Payments	X			Approved November 2014
7-14	Collection Bonds		X		See Bonds, Notes & Interest Payments 7-12

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
7-21	Financial Information Resources System (FIRMS) Periodic Reports			X	General Schedules specific to one agency have been removed.
7-22	Financial Information Resources System (FIRMS) Year End Reports			X	General Schedules specific to one agency have been removed.
7-28	Notary Bond Files			X	General Schedules specific to one agency have been removed.
7-36	State General Obligation Bonds		X		See Bond Transcripts 7-10
7-37	State Revenue Bonds		X		See Bond Transcripts 7-10
7-38	Stores Accounting Files			X	General Schedules specific to one agency have been removed.
10-1	Administrative Payroll Reports		X		See Payroll Post Processing Records 10-31

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
10-3	Deductions & Other Earning Registers		X		See Payroll Processing Records 10-30
10-7	Garnishments		X		See Payroll Processing Records 10-30
10-9	Insurance Deduction Files		X		See Payroll Processing Records 10-30
10-10	Leave Adjustment Reports		X		See Timekeeping Records 10-29
10-11	Leave Applications		X		See Timekeeping Records 10-29
10-13	Leave Summary Report		X		See Payroll Post Processing Records 10-30
10-15	Payroll Register		X		See Payroll Post Processing Records 10-31
10-17	Retirement Benefits Assistance Files		X		See Payroll Processing Records 10-30
10-18	Retirement Files		X		See Employee Wage History Records 10-32
10-20	Savings Bond Purchase Summary		X		See Payroll Processing Records 10-30

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
10-24	Taxable Wage Earning Reports		X		See Payroll Processing Records 10-30
10-25	Time & Attendance Reports		X		See Timekeeping Records 10-29
10-29	Timekeeping Records	X			Approved July 2015
10-30	Payroll Processing Records	X			Approved July 2015
10-31	Payroll Post Processing Records	X			Approved July 2015
10-32	Employee Wage History Records	X			Approved July 2015
11-1	Adverse Action Files		X		See Grievance Records 11-64
11-2	Official Employee Personnel File		X		See Employment History Records 11-62 or Performance Plans & Evaluations 11-63
11-9	Employee Awards		X		See Performance Plans & Evaluations 11-63

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
11-15	Equal Employment Opportunity (DDO) Discrimination Complaint Case Files		X		See Complaint Investigation Files 11-66
11-19	Grievance/Appeal Files		X		See Grievance Records 11-64
11-22	Individual Health Record Files		X		See Employment Health & Medical Records 11-65
11-23	Interview Records		X		See Staff Acquisition Records 11-61
11-26	Length of Service Award Files		X		See Performance Plans & Evaluations 11-63
11-30	Employee Performance-Related Records		X		See Performance Plans & Evaluations 11-63
11-35	Worker's Compensation Case Files	X			Approved September 2014
11-43	Recruitment Files		X		See Staff Acquisition Records 11-61

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
11-57	Family Medical Leave Applications		X		See Employment Health & Medical Records 11-65
11-61	Staff Acquisition Records	X			Approved May 2015
11-62	Employment History Records	X			Approved November 2014
11-63	Performance Plans & Evaluations	X			Approved November 2014
11-65	Employee Health & Medical Records	X			Approved September 2014
11-66	Complaint Investigation Files	X			Approved July 2015
12-1	Control Files			X	General Schedules specific to one agency have been removed.
12-2	Plate, Negatives, & Art Work Files			X	This schedule has proven to no longer be effective.
12-3	Printing Project Files			X	Format specific schedules have been removed.
12-4	Printing Report Files			X	Format specific schedules have been removed.

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
13-12	Successful Bids & Proposals Files		X		See Request for Proposals 13-17
13-17	Request for Proposal Records	X			Approved June 2015
14-5	Right of Way Records	X			Approved June 2015
15-2	Complaint/Informant Files		X		See Complaint Investigation Files 11-66
15-8	Press Releases		X		See Public Relations Records 1-69
16-1	Departmental Recovery Reports		X		See Disaster Plan Records 16-18
16-2	Disaster Planning Files		X		See Disaster Plan Records 16-18
16-4	Guard Service Control Files		X		See Disaster Plan Records 16-18
16-7	Key Accountability Files		X		See Disaster Plan Records 16-18
16-11	Personnel Security Clearance Files		X		See Disaster Plan Records 16-18

	Schedule Name	New or Updated	Cross-walked⁵	Obsolete	Notes
16-18	Disaster Planning Records	X			Approved June 2014
17-1	Misdemeanor & Felony Investigation Files	X			Approved May 2015
17-2	Homicide, Violent Felonies & Sex Crime Investigation Files	X			Approved May 2015
17-3	Daily Activity Records	X			Approved May 2015
17-4	Suicide Investigation Records	X			Approved May 2015

County Schedules in Numerical Order:

	Schedule Name	New or Updated	Cross-walked ⁶	Obsolete	Notes
1-2	Agenda		X		See state schedule Open Meeting Minutes and Public Materials 1-59
1-3	Annual Reports		X		See state schedule Publications 1-25
1-6	Daily Activity Schedules			X	This schedule has proven to no longer be effective.
1-7	Policy and Program Correspondence		X		See state schedule Executive Correspondence 1-61
1-8	Executive/Elected Officials Calendars			X	This schedule has proven to no longer be effective.
1-10	Finding Aids		X		See state schedule Information Governance Records 1-66
1-12	Housekeeping Files		X		See state schedule Transitory Tracking Records 1-73
1-13	Incoming Document Log		X		See state schedule Information Governance Records 1-66
1-15	Minutes		X		See state schedule Open Meeting Minutes & Public Materials 1-59

⁶ "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
1-16	Organizational Files		X		See state schedule Agency History Records 1-76
1-17	Pending Files		X		See state schedule Transitory Tracking Records 1-73
1-18	Policies and Procedure Manuals		X		See state schedule Publications 1-25
1-20	Press Release Files		X		See state schedule Public Relations Records 1-69
1-22	Publications		X		See state schedule Publications 1-25
1-23	Public Relations Files		X		See state schedule Public Relations Records 1-69
1-24	Reading or Chronological Files			X	This schedule has proven to no longer be effective.
1-26	Routine Control Files			X	This schedule has proven to no longer be effective.
1-28	Technical Reference Files			X	This schedule has proven to no longer be effective.
1-29	Word Processing Files			X	This schedule has proven to no longer be effective.
1-30	Working Papers		X		See state schedule Working Files 1-33

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
1-31	County Histories		X		See state schedule Agency History Records 1-76
1-34	Transitory Correspondence		X		See state schedule Transitory Correspondence 1-62
1-36	Telephone Message Registers		X		See state schedule Transitory Tracking Records 1-73
1-37	Telephone Messages		X		See state schedule Transitory Tracking Records 1-73
1-38	Records Transfer Sheets		X		See state schedule Information Governance Records 1-66
1-40	Government Records Access and Management Act (GRAMA) County Appeals Case Files		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
1-41	Government Records Access and Management Act (GRAMA) Access Requests		X		See state schedule Records Access Requests and Appeals 1-64

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
1-42	Government Records Access and Management Act (GRAMA) State Appeals Case Files		X		See state schedule Records Access Requests and Appeals 1-64
1-44	Meeting Recordings		X		See state schedule Open Meeting Minutes & Public Materials 1-59, Open Meeting Recordings 1-65, or Closed Meeting Records 1-60
1-48	Administrative Correspondence		X		See state schedule Administrative Correspondence 1-63
2-2	Bond Issue Files		X		See state schedule Bond Transcripts 7-10
2-3	Bond Redemption & Destruction Certificates		X		See state schedule Bonds, Notes & Interest Payments 7-12
2-4	Bond Redemption Registers		X		See state schedule Bonds, Notes & Interest Payments 7-12
2-5	Bond Registration Files		X		See state schedule Bonds, Notes & Interest Payments 7-12

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
2-6	Bonds, Notes & Coupons Paid Files		X		See state schedule Bonds, Notes & Interest Payments 7-12
2-7	General Obligation Bonds		X		See state schedule Bond Transcripts 7-10
2-8	Revenue Bonds		X		See state schedule Bond Transcripts 7-10
5-31	Adding Machine Tapes			X	Format specific schedules have been removed.
7-1	Administrative Payroll Reports		X		See state schedule Payroll Post Processing Records 10-31
7-3	Deductions & Other Earnings Registers		X		See state schedule Payroll Processing Records 10-30
7-4	Employee Earnings History Files		X		See state schedule Payroll Processing Records 10-30 or Employee Wage History Records 10-32
7-5	Flextime Attendance Records		X		See state schedule Timekeeping Records 10-29
7-6	Garnishment Records		X		See state schedule Payroll Processing Records 10-30

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
7-7	Income Tax Exemptions & Withholding Files		X		See state schedule Payroll Processing Records 10-30
7-8	Individual Authorized Allotments Files		X		See state schedule Payroll Processing Records 10-30
7-9	Insurance Deduction Files		X		See state schedule Payroll Processing Records 10-30
7-10	Leave Adjustment Report		X		See state schedule Timekeeping Records 10-29
7-11	Leave Application Files		X		See state schedule Timekeeping Records 10-29
7-12	Leave Data Files		X		See state schedule Timekeeping Records 10-29
7-13	Payroll Register		X		See state schedule Employee Wage History Records 10-32
7-14	Retirement Benefits Assistance Files		X		See state schedule Timekeeping Records 10-29
7-15	Retirement Files		X		See state schedule Timekeeping Records 10-29

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
7-16	Taxable Wage Earning Reports		X		See state schedule Payroll Processing Records 10-30
7-17	Time Sheets		X		See state schedule Timekeeping Records 10-29
7-19	Saving Bond Purchase Records		X		See state schedule Payroll Processing Records 10-30
7-20	Saving Bond Purchase Summary Report		X		See state schedule Payroll Processing Records 10-30
8-1	Adverse Action Files		X		See state schedule Grievance Records 11-64
8-4	Eligibility Register		X		See state schedule Staff Acquisition Records 11-61
8-5	Employee History Card		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
8-13	Green Thumb Program Files			X	The Green Thumb Program is obsolete.
8-14	Grievance & Disciplinary Files		X		See state schedule Grievance Records 11-64

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
8-15	Interview Records		X		See state schedule Grievance Records 11-64
8-16	Job Opening Files		X		See state schedule Staff Acquisition Records 11-61
8-18	Merit Employee Performance-Related Records		X		See state schedule Performance Plans & Evaluations 11-63
8-19	Personal Injury Files		X		See state schedule Worker's Compensation Files 11-35
8-20	Personnel Files		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
8-21	Personnel Requisition & Analysis Files		X		See state schedule Staff Acquisition Records 11-61
8-22	Position Description Files		X		See state schedule Staff Acquisition Records 11-61
8-25	Recruitment Files		X		See state schedule Staff Acquisition Records 11-61

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
8-29	Pre-Employment Tests		X		See state schedule Staff Acquisition Records 11-61
9-6	Requests for Proposals		X		See state schedule Requests for Proposal Records 13-17
9-7	Successful Bid Proposals Files		X		Request for Proposal Records 13-17
9-8	Unopened Bids Proposals Files		X		See state schedule Request for Proposal Records 13-17
9-9	Unsuccessful Bids and Proposals Files		X		See state schedule Request for Proposal Records 13-17
10-1	Disaster Planning Files		X		See state schedule Disaster Plan Records 16-18
10-6	Medical & Dental Insurance Claim Files		X		See state schedule Employee Health & Medical Records 11-65
12-7	Opinions		X		See state schedule Formal Opinion Records 1-75
14-4	Birth Registers		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
14-12	Death Registers		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
14-24	Marriage License Applications		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
14-25	Marriage Licenses		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
14-26	Marriage License Register		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
14-36	State Drivers' License Master License Report			X	General Schedules specific to one agency have been removed
14-42	Vital Records	X			Approved February 2015
14-44	Burial-Transit Permit Applications		X		See county schedule Cemetery Management Records 14-44
16-13	Daily Activity Report		X		See state schedule Daily Activity Records 17-3

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
16-20	Felony Investigation Case Files		X		See state schedule Misdemeanor and Felony Investigation Files 17-1
16-26	Homicide & Theft of Public Funds Case Files		X		See state schedule Homicide, Violent Felonies & Sex Crime Investigation Files 17-2
16-37	Misdemeanor Case Files		X		See state schedule Misdemeanor & Felony Investigation Files 17-1
20-1	Activity Reports		X		See state schedule Animal Control Records 1-67
20-2	Animal Adoption Agreements		X		See state schedule Animal Control Records 1-67
20-3	Animal Citations		X		See state schedule Animal Control Records 1-67
20-4	Animal Master Report Cards		X		See state schedule Animal Control Records 1-67
20-5	Bite Reports		X		See state schedule Animal Control Records 1-67
20-6	Complaint Records		X		See state schedule Animal Control Records 1-67

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
20-8	Controlled Substances Euthanasia License Records		X		See state schedule Animal Control Records 1-67
20-9	Controlled Substances Euthanasia Log		X		See state schedule Animal Control Records 1-67
20-10	Dog License Records		X		See state schedule Animal Control Records 1-67
20-11	Master Logs		X		See state schedule Animal Control Records 1-67
25-6	Board of Health Minutes			X	See state schedule Open Meeting Minutes and Public Materials 1-59
25-19	Communicable Disease Case Files Index			X	General Schedules specific to one agency have been removed.
25-20	Communicable Disease Case Files			X	General Schedules specific to one agency have been removed.
25-21	Communicable Disease Control Program Files			X	General Schedules specific to one agency have been removed.

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
25-24	Death Certificates		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
25-32	Environmental/ Occupational Investigation Case Files			X	General Schedules specific to one agency have been removed.
25-60	Monthly Cemetery Death Report		X		See county schedule Cemetery Management Records 14-44
25-66	Morbidity Data Summary Reports		X		General Schedules specific to one agency have been removed.
25-79	Sexually Transmitted Disease Program Files			X	General Schedules specific to one agency have been removed.
25-99	Fetal Death Certificates		X		See county schedule Vital Records 14-42 or state schedule Vital Records 1-72
25-100	Annual Program Reports		X		See state schedule Publications 1-25
27-4	County Fair Board Minutes		X		See state schedule Open Meeting Minutes & Public Materials 1-59

	Schedule Name	New or Updated	Cross-walked⁶	Obsolete	Notes
28-4	Board of Adjustment Minutes and Index		X		See state schedule Open Meeting Minutes and Public Materials 1-59
30-1	Annual Report		X		See state schedule Publications 1-25

Municipal Schedules in Numerical Order:

	Schedule Name	New or Updated	Cross-walked ⁷	Obsolete	Notes
1-1	Meeting Agenda		X		See state schedule Open Meeting Minutes & Public Materials 1-59
1-2	Annual Report		X		See state schedule Publications 1-25
1-5	Finding Aids		X		See state schedule Information Governance Records 1-66
1-6	General Administrative Records			X	This schedule has proven to be ineffective.
1-7	Housekeeping Files		X		See state schedule Transitory Tracking Records 1-73
1-8	Policy and Program Correspondence		X		See state schedule Executive Correspondence 1-61
1-12	Mailing Lists			X	This schedule has proven to no longer be effective.
1-13	Minutes		X		See state schedule Open Meeting Minutes & Public Materials 1-59
1-14	City Histories		X		See state schedule Agency History Records 1-76

⁷ "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
1-15	Organizational Files		X		See state schedule Agency History Records 1-76
1-16	Policies and Procedure Manuals		X		See state schedule Publications 1-25
1-19	Public Relations Files		X		See state schedule Public Relations Records 1-69
1-20	Public Release Files		X		See state schedule Public Relations Records 1-69
1-21	Publications		X		See state schedule Publications 1-25
1-22	Reading or Chronological Files			X	This schedule has proven to no longer be effective.
1-23	Routine Control Files			X	This schedule has proven to no longer be effective.
1-26	Technical Reference Files			X	This schedule has proven to no longer be effective.
1-29	Government Records Access and Management Act (GRAMA) Access Requests		X		See state schedule Records Access Requests and Appeals 1-64

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
1-30	Government Records Access and Management Act (GRAMA) Municipal Appeals Case Files		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
1-31	Government Records Access and Management Act (GRAMA) State Appeals Case Files		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
1-32	Incoming Document Log		X		See state schedule Information Governance Records 1-66
1-35	Pending Files		X		See state schedule Transitory Tracking Records 1-73
1-38	Records Transfer Sheets		X		See state schedule Information Governance Records 1-66
1-40	Telephone Message Registers		X		See state schedule Transitory Tracking Records 1-73
1-41	Telephone Messages		X		See state schedule Transitory Tracking Records 1-73

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
1-42	Transitory Correspondence		X		See state schedule Transitory Correspondence 1-62
1-44	Working Files		X		See state schedule Working Files 1-33
1-45	Meeting Recordings		X		See state schedule Open Meeting Minutes & Public Materials 1-59, Open Meeting Recordings 1-65, or Closed Meeting Records 1-60
1-46	System Studies Supporting Files		X		See state schedule Working Files 1-33
1-49	Administrative Correspondence		X		See state schedule Administrative Correspondence 1-63
5-31	Adding Machine Tapes			X	Format specific schedules have been removed.
8-1	Administrative Payroll Reports		X		See state schedule Payroll Post Processing Records 10-31
8-3	Deductions & Other Earnings Registers		X		See state schedule Payroll Processing Records 10-30
8-4	Employee Earnings History Files		X		See state schedule Employee Wage History Records 10-32

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
8-5	Garnishment Records		X		See state schedule Payroll Processing Records 10-30
8-6	Income Tax Exemptions & Withholding Files		X		See state schedule Payroll Processing Records 10-30
8-7	Individual Authorized Allotments Files		X		See state schedule Payroll Processing Records 10-30
8-8	Insurance Deduction Files		X		See state schedule Payroll Processing Records 10-30
8-9	Leave Application Files		X		See state schedule Timekeeping Records 10-29
8-10	Leave Data Files		X		See state schedule Timekeeping Records 10-29
8-11	Payroll Files		X		See state schedule Timekeeping Records 10-29, Payroll Processing Records 10-30, Employee Wage History Records 10-32
8-12	Payroll Register		X		See state schedule Employee Wage History Records 10-32
8-13	Retirement Files		X		See state schedule Payroll Processing Records 10-30

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
8-14	Time Sheets		X		See state schedule Timekeeping Records 10-29
8-16	Worker's Compensation Claim Files		X		See state schedule Worker's Compensation Files 11-35
8-17	Flextime Attendance Records		X		See state schedule Timekeeping Records 10-29
8-18	Leave Adjustment Report		X		See state schedule Timekeeping Records 10-29
8-19	Retirement Benefits Assistance Files		X		See state schedule Timekeeping Records 10-29
8-20	Saving Bond Purchase Records		X		See state schedule Payroll Processing Records 10-30
8-21	Saving Bond Purchase Summary Report		X		See state schedule Payroll Processing Records 10-30
8-22	Taxable Wage Earning Reports		X		See state schedule Payroll Processing Records 10-30

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
9-1	Employee Applications (Hired)		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
9-2	Eligibility Certificates		X		See state schedule Staff Acquisition Records 11-61
9-3	Comprehensive Employment and Training Act (CETA) Personnel Files			X	This federally funded employment program is obsolete.
9-4	Eligibility Register		X		See state schedule Staff Acquisition Records 11-61
9-6	Employee History Card		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
9-9	Grievance & Disciplinary Files		X		See state schedule Grievance Records 11-64
9-10	Job Opening Files		X		See state schedule Staff Acquisition Records 11-61

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
9-11	Personal Injury Files		X		See state schedule Worker's Compensation Files 11-35
9-12	Personnel Files		X		See state schedule Employment History Records 11-62 or Performance Plans & Evaluations 11-63
9-13	Position Description Files		X		See state schedule Staff Acquisition Records 11-61
9-14	Position Survey Files		X		See state schedule Staff Acquisition Records 11-61
9-16	Adverse Action Files		X		See state schedule Grievance Records 11-64
9-19	Employee Warning Files		X		See state schedule Complaint Investigation Files 11-66
9-20	Employee Applications (Not Hired)		X		See state schedule Staff Acquisition Records 11-61
9-25	Interview Records		X		See state schedule Staff Acquisition Records 11-61

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
9-27	Merit Employee Performance-Related Records		X		See state schedule Performance Plans & Evaluations 11-63
9-28	Personnel Requisition & Analysis Files		X		See state schedule Staff Acquisition Records 11-61
9-30	Recruitment Files		X		See state schedule Staff Acquisition Records 11-61
9-34	Employment Eligibility Records (I)		X		See state schedule Employment History Records 11-62
9-36	Municipal Officers' and Employees' Ethics Act Records		X		See state schedule Complaint Investigation Files 11-66
9-38	Pre-Employment Tests		X		See state schedule Staff Acquisition Records 11-61
10-2	Successful Bid Proposals Files		X		Request for Proposal Records 13-17
10-9	Requests for Proposals		X		See state schedule Requests for Proposal Records 13-17

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
10-10	Unopened Bids Proposals Files		X		See state schedule Request for Proposal Records 13-17
10-11	Unsuccessful Bids and Proposals Files		X		See state schedule Request for Proposal Records 13-17
11-1	Disaster Planning Files		X		See state schedule Disaster Plan Records 16-18
12-1	Minutes of the Board of Equalization and Review		X		See state schedule Open Meeting Minutes & Public Materials 1-59
13-9	Airport Authority Board Minutes		X		See state schedule Open Meeting Minutes and Public Materials 1-59
13-12	Airport Certification Specification Manuals		X		See state schedule Publications 1-25
14-1	Activity Reports		X		See state schedule Animal Control Records 1-67
14-2	Animal Citations		X		See state schedule Animal Control Records 1-67
14-3	Animal Master Report Cards		X		See state schedule Animal Control Records 1-67

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
14-4	Complaint Records		X		See state schedule Animal Control Records 1-67
14-5	Daily Field Reports		X		See state schedule Animal Control Records 1-67
14-6	Dog License Records		X		See state schedule Animal Control Records 1-67
14-7	Master Logs		X		See state schedule Animal Control Records 1-67
14-8	Animal Adoption Agreements		X		See state schedule Animal Control Records 1-67
14-9	Bite Reports		X		See state schedule Animal Control Records 1-67
14-11	Controlled Substances Euthanasia License Records		X		See state schedule Animal Control Records 1-67
14-12	Controlled Substances Euthanasia Log		X		See state schedule Animal Control Records 1-67
15-4	Formal Legal Opinions		X		See state schedule Formal Opinion Records 1-75

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
15-11	Informal Legal Opinions		X		See state schedule Legal Counsel Records 1-74
16-10	Minutes of the Board of Appeals and Examiners		X		See state schedule Open Meeting Minutes & Public Materials 1-59
17-1	Certificates of Perpetual Care		X		See county schedule Burial Records 14-43
17-2	Deed Register/ Payment Records		X		See county schedule Burial Records 14-43
17-3	Deeds		X		See county schedule Burial Records 14-43
17-4	Grave Opening Orders		X		See county schedule Cemetery Management Records 14-44
17-6	Lot Books/ Files		X		See county schedule Burial Records 14-43
17-7	Map Books		X		See county schedule Burial Records 14-43
17-8	Plot Index Books/ Files		X		See county schedule Burial Records 14-43
17-10	Interment Reports		X		See county schedule Cemetery Management Records 14-44

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
18-7	Council Agenda		X		See state schedule Open Meeting Minutes & Public Materials 1-59
18-23	Council Minutes		X		See state schedule Open Meeting Minutes & Public Materials 1-59
20-3	Board of Adjustment Minutes and Indexes		X		See state schedule Open Meeting Minutes and Public Materials 1-59
20-4	Planning Commission Minutes		X		See state schedule Open Meeting Minutes and Public Materials 1-59
21-2	Daily Activity Report		X		See state schedule Daily Activity Records 17-3
21-6	Misdemeanor Case Files		X		See state schedule Misdemeanor & Felony Investigation Files 17-1
21-57	Felony Investigation Case Files		X		See state schedule Misdemeanor and Felony Investigation Files 17-1
21-58	Homicide & Theft of Public Funds Case Files		X		See state schedule Homicide, Violent Felonies & Sex Crime Investigation Files 17-2
21-64	Police In-car Video Recordings		X		See state schedule Daily Activity Records 17-3

	Schedule Name	New or Updated	Cross-walked⁷	Obsolete	Notes
22-9	As-Built Construction Drawings		X		See state schedule As-built Construction Plans & Specifications 6-14
22-36	Hydrograph Annual Reports		X		See state schedule Publications 1-25
22-38	Water Consumption Annual Reports		X		See state schedule Publications 1-25
24-1	Annual Report		X		See state schedule Publications 1-25
25-2	Annual Report		X		See state schedule Publications 1-25
25-3	Board of Director's Minutes		X		See state schedule Open Meeting Minutes and Public Materials 1-59
25-18	State Library Annual Report			X	General Schedules specific to one agency have been removed.

School District Schedules in Numerical Order:

	Schedule Name	New or Updated	Cross-walked ⁸	Obsolete	Notes
1-1	Transitory Correspondence		X		See state schedule Transitory Correspondence 1-62
1-2	Agenda		X		See state schedule Open Meeting Minutes and Public Materials 1-59
1-3	Directories		X		See state schedule Publications 1-25
1-4	Document Log		X		See state schedule Transitory Tracking Records 1-73
1-6	Policy and Program Correspondence		X		See state schedule Executive Correspondence 1-61
1-8	Finding Aids		X		See state schedule Information Governance Records 1-66
1-9	Government Records Access and Management Act (GRAMA) Access Requests		X		See state schedule Records Access Requests and Appeals 1-64

⁸ "Crosswalked" means to move an obsolete retention schedule under an updated general retention schedule.

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
1-10	Government Records Access and Management Act (GRAMA) School District Appeals Case Files		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
1-11	Government Records Access and Management Act (GRAMA) State Appeals Case Files		X		See state schedule Government Records Access and Management Act (GRAMA) Appeals Case Files 1-68
1-12	Housekeeping Files		X		See state schedule Transitory Tracking Records 1-73
1-15	Minutes		X		See state schedule Open Meeting Minutes & Public Materials 1-59
1-17	Organizational Files		X		See state schedule Agency History Records 1-76
1-18	Pending Files		X		See state schedule Transitory Tracking Records 1-73
1-20	Policies and Procedure Manuals		X		See state schedule Publications 1-25

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
1-22	Press Release Files		X		See state schedule Public Relations Records 1-69
1-24	Publications		X		See state schedule Publications 1-25
1-25	Reading or Chronological Files			X	This schedule has proven to no longer be effective.
1-26	Records Transfer Sheets		X		See state schedule Information Governance Records 1-66
1-27	Routine Control Records			X	See state schedule Transitory Tracking Records 1-73
1-30	Technical Reference Files			X	See state schedule Transitory Tracking Records 1-73
1-31	Telephone Message Registers		X		See state schedule Transitory Tracking Records 1-73
1-32	Telephone Messages		X		See state schedule Transitory Tracking Records 1-73
1-34	Working Case Files		X		See state schedule Working Files 1-33
1-35	Denied Requests Internet Log Files		X		See state schedule Transitory Tracking Records 1-73
1-36	Internet Access Logs		X		See state schedule Transitory Tracking Records 1-73

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
1-37	Administrative Correspondence		X		See state schedule Administrative Correspondence 1-63
2-3	Bond Redemption Registers		X		These records are no longer created by school districts.
6-1	Administrative Payroll Reports		X		See state schedule Payroll Post Processing Records 10-31
6-3	Deduction Annuity Authorization Files		X		See state schedule Payroll Processing Records 10-30
6-4	Deduction Authorization Files		X		See state schedule Payroll Processing Records 10-30
6-5	Deductions & Other Earnings Registers		X		See state schedule Payroll Processing Records 10-30
6-7	Employee Earnings History Files		X		See state schedule Payroll Processing Records 10-30, Payroll Post Processing Records 10-31, or Employee Wage History Records 10-32
6-8	Five Year Leave Data Sheet		X		See state schedule Payroll Post Processing Records 10-31 or Employee Wage History Records 10-32

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
6-9	Garnishment Records		X		See state schedule Payroll Processing Records 10-30, or Payroll Post Processing Records 10-31
6-10	Income Tax Exemptions & Withholding Files		X		See state schedule Payroll Processing Records 10-30
6-11	Individual Authorized Allotments Files		X		See state schedule Payroll Processing Records 10-30
6-12	Insurance Deduction Files		X		See state schedule Payroll Processing Records 10-30
6-13	Leave Adjustment Report		X		See state schedule Timekeeping Records 10-29
6-14	Leave Application Files		X		See state schedule Timekeeping Records 10-29
6-15	Leave Data Files		X		See state schedule Timekeeping Records 10-29
6-16	Monthly Payroll Deduction Billings		X		See state schedule Payroll Processing Records 10-30
6-17	Payroll Absence Summary Report		X		See state schedule Payroll Post Processing Records 10-31

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
6-18	Payroll Register		X		See state schedule Payroll Post Processing Records 10-31
6-20	Personnel Action Records		X		See state schedule Timekeeping Records 10-29
6-21	Retirement Files		X		See state schedule Payroll Processing Records 10-30
6-22	Retirement Reports		X		See state schedule Payroll Post Processing Records 10-31
6-23	Taxable Wage Earning Reports		X		See state schedule Payroll Processing Records 10-30
6-24	Time Sheets		X		See state schedule Timekeeping Records 10-29
6-26	Payroll Report		X		See state schedule Timekeeping Records 10-29
7-10	Receiving Slips		X		See state schedule Transitory Tracking Records 1-73
7-11	Requests for Proposals		X		See state schedule Requests for Proposal Records 13-17
7-14	Successful Bid Proposals Files		X		Request for Proposal Records 13-17

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
7-16	Unopened Bids Proposals Files		X		See state schedule Request for Proposal Records 13-17
7-17	Unsuccessful Bids and Proposals Files		X		See state schedule Request for Proposal Records 13-17
7-18	Vendor List			X	This schedule has proven to no longer be effective.
8-3	Health and Accident Insurance Records		X		See state schedule Employee Health and Medical Records 11-65
8-7	Medical & Dental Insurance Claim Files		X		See state schedule Employee Health & Medical Records 11-65
8-10	Worker's Compensation Employee's First Injury Report		X		See state schedule Worker's Compensation Files 11-35
9-6	Student Dropout Annual Report			X	General Schedules specific to one agency have been removed
14-1	Certified Personnel Files		X		See state schedule Employment History Records 11-62, or Performance Plans & Evaluations 11-63

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
14-4	Classified Employee History Card		X		See state schedule Employment History Records 11-62, or Performance Plans & Evaluations 11-63
14-5	Medical Files		X		See state schedule Employee Health & Medical Records 11-65
14-7	Employment Eligibility Records (I)		X		See state schedule Employment History Records 11-62
14-11	Certified Employee Contracts		X		See state schedule Employment History Records 11-62
14-16	Family Medical Leave Applications		X		See state schedule Employee Health & Medical Records 11-65
14-17	Job Descriptions		X		See state schedule Staff Acquisition Records 11-61
14-18	University Recommendation Teacher Packets		X		See state schedule Staff Acquisition Records 11-61
14-21	Court Ordered Community Service Files		X		See school district schedule Discipline 17-30

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
14-22	Eligibility Register		X		See state schedule Staff Acquisition Records 11-61
14-23	Employee Applications (Not Hired)		X		See state schedule Staff Acquisition Records 11-61
14-27	Grievance & Disciplinary Files		X		See state schedule Grievance Records 11-64, or Complaint Investigation Files 11-66
14-28	Interview Records		X		See state schedule Staff Acquisition Records 11-61
14-29	Job Opening Files		X		See state schedule Staff Acquisition Records 11-61
14-30	Performance Related Records		X		See state schedule Performance Plans & Evaluations 11-63
14-36	Recruitment Files		X		See state schedule Staff Acquisition Records 11-61
17-27	Enrollment and Registration	X			Approved August 2013
15-1	Board Agenda		X		See state schedule Open Meeting Minutes and Public Materials 1-59

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
15-2	Board Minutes		X		See state schedule Open Meeting Minutes and Public Materials 1-59
15-5	Board Exhibit Files		X		See state schedule Open Meeting Minutes and Public Materials 1-59
15-7	Board Meeting Tape Recordings		X		See state schedule Open Meeting Minutes and Public Materials 1-59
17-1	Student Attendance Class Rolls		X		See school district schedule Attendance 17-26
17-2	Student Cumulative Files		X		See school district schedule Performance and Testing 17-29
17-3	Official Transcripts		X		See school district schedule Graduation and Transcripts 17-32
17-5	Prescribed Medication Records		X		See school district schedule Medical Log Records 17-28
17-7	Non-Utah Resident Student Files		X		See school district schedule Enrollment and Registration 17-27
17-8	Home-school Applications		X		See school district schedule Enrollment and Registration 17-27
17-9	Out-of-District-Boundary Application		X		See school district schedule Enrollment and Registration 17-27

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
17-10	Young Mothers Applications		X		See school district schedule Enrollment and Registration 17-27
17-11	School Choice Applications		X		See school district schedule Enrollment and Registration 17-27
17-16	Applied Technology Rollbooks		X		See state schedule Publications 1-25
17-24	Student Executive Board Minutes		X		See state schedule Open Meeting Minutes & Public Materials 1-59
17-25	Student History	X			Approved August 2013
17-26	Attendance	X			Approved August 2013
17-28	Medical Log Records	X			Approved August 2013
17-29	Performance and Testing	X			Approved August 2013
17-30	Discipline	X			Approved August 2013
17-31	Permission and Passes	X			Approved August 2013

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
17-32	Graduation and Transcripts	X			Approved August 2013
19-4	Attendance Records		X		See school district schedule Attendance 17-26
19-5	Attendance Summary Report		X		See school district schedule Attendance 17-26
19-20	Grade Sheets		X		See school district schedule Performance and Testing 17-29
19-23	Home Excuse Files		X		See school district schedule Permission and Passes 17-31
19-24	Literary Publications		X		See state schedule Publications 1-25
19-29	Medication Administration and Dispensing Records		X		See school district schedule Medical Log Records 17-28
19-35	Pupil Transportation Permission Slip		X		See school district schedule Permission and Passes 17-31
19-41	School Bulletins		X		See state schedule Transitory Correspondence 1-62
19-42	School Handbook		X		See state schedule Publications 1-25

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
19-44	School Newspapers		X		See state schedule Publications 1-25
19-47	Student Class Schedules		X		See school district schedule Enrollment and Registration 17-27
19-48	Student Discipline Files		X		See school district schedule Discipline 17-30
19-49	Student Enrollment Registration Records		X		See school district schedule Enrollment and Registration 17-27
19-52	Student Registration Records		X		See school district schedule Enrollment and Registration 17-27
19-53	Student Report Cards		X		See school district schedule Performance and Testing 17-29
19-54	Student Withdrawal Records		X		See school district schedule Enrollment and Registration 17-27
19-56	Transportation Allowance Applications		X		See school district schedule Permission and Passes 17-31

	Schedule Name	New or Updated	Cross-walked⁸	Obsolete	Notes
19-58	Worker's Compensation Employee's First Injury Report		X		See state schedule Worker's Compensation Files 11-35
19-59	Yearbooks		X		See state schedule Publications 1-25
19-60	Gifted and Talented Student Tests		X		See school district schedule Performance and Testing 17-29
19-61	Counselor's Student Files		X		See school district schedule Discipline 17-30

Glossary:

Administrative Value

In appraisal, the usefulness of records for the conduct of current and/or future administrative business needs.

Appraisal

The process of determining the value and thus the disposition of records based on their current administrative, fiscal, & legal value; their evidential and informational value; their arrangement and condition; their intrinsic value; and their relationship to other records.

Crosswalk

The moving of an obsolete retention schedule under an updated retention schedule.

Disposition

The final action that puts into effect the results of an appraisal decision for a series of records. Transfer to an archival repository, retain permanently in the agency, or destruction, are among possible disposition actions.

Evidential Value

In appraisal, the value of a record that documents the activities of an organization or agency.

Fiscal Value

In appraisal, records required until a financial audit is completed or financial obligations are fulfilled.

General Schedule

Retention schedule which specifies the approved disposition of certain series of general records common to many agencies and serves as a model for agencies to evaluate similar record series.

Historical Value

In appraisal, the value that documents the history of an organization. Sometimes referred to as archival, continuing, or enduring value. Secondary Historical Value does not document the history of an organization, but recognizes a record containing information that is useful for conducting historical research.

Informational Value

In appraisal, the value of a record that provides unique and permanent information for purposes of research.

Legal Value

In appraisal, the usefulness of records containing evidence of legally enforceable rights or obligations. Also refers to retentions specified by statute, rule, or regulation.

Permanent Records

Indicates a disposition other than destroy. Specifically, records would either be transferred to the State Archives or maintained permanently in office. These records need continued retention due to their long-term administrative, legal, fiscal, or historical value.

Record Copy

The original file copy of a record series maintained by the creating agency, sometimes referred to as the designated original or blue-ribbon copy.

Record Series

A group of identical or related records, files, documents and/or other media created by one agency that are normally used, indexed, or filed together, and that permit evaluation as a unit for retention and disposition purposes.

Records

All books, papers, letters, documents, maps, plans, photographs, sound recordings, management information systems, or other documentary materials, regardless of physical form or characteristics, made or received, and retained by any public office under state law or in connection with the transaction of public business by the offices, agencies, and institutions of the state and its counties, municipalities, and other political subdivisions.

Retention Period

The period of time during which records are kept in the custody of the creating agency (including Records Center storage) before disposition occurs; usually in terms of years or contingent upon an event, such as an audit.

Retention Schedule

A list or other instrument describing record series and their minimum retention periods.

Schedule

Used as a verb, means to establish retention periods for current records and provide for proper disposition at the end of their active use.