

Retention and Classification Report

Agency: Administrative Office of the Courts (120)

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Records Officer

83953	Annual reports
16935	Director of court services meeting minutes
14046	Directories
11523	Employment applications
29663	Filed wills
05130	*Financial Information Resources Management System (FIRM)
83952	*Newsletters
11522	Personnel records
22685	*Publications
05135	*Revenue distribution reports
05118	Telephone bills
05129	Warrant requests

AGENCY: Administrative Office of the Courts

SERIES: 83953

3

TITLE: Annual reports

DATES: 1973-

ARRANGEMENT: Chronological.

DESCRIPTION:

This series contains reports of the Administrative Office of the Courts' activities from the previous year with information pertaining to the administrator's message, agency activities, justice system, justices, agency services, and caseloads.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

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

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

APPRAISAL:

These records have historical value(s).

Disposition based on the value of these records in documenting agency achievements, policies, programs, and function.

AGENCY: Administrative Office of the Courts

SERIES: 83953

TITLE: Annual reports

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Administrative Office of the Courts

SERIES: 16935

3

TITLE: Director of court services meeting minutes

DATES: 1973-

ARRANGEMENT: Chronological.

DESCRIPTION:

This is the record of the meeting of the Director of Court Services. The director is assigned the authority by UCA 78-3a-12 to appoint court clerks, deputy court clerks, and probation officers, to supervise the nonjudicial court staff, and serve as administrative officer of the court. Includes the date and time of the meeting, the place of the meeting, the individuals present, the topics discussed, and any decisions reached.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 03/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then microfilm and transfer to State Archives with authority to weed.

Microfilm master: Retain in Office permanently.

Microfiche master: Retain in State Archives permanently.

APPRAISAL:

These records have administrative, and/or historical value(s). As the chief administrator of the juvenile courts, the record of the director's meetings is of obvious long term value.

AGENCY: Administrative Office of the Courts

SERIES: 16935

TITLE: Director of court services meeting minutes

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Administrative Office of the Courts

SERIES: 14046

3

TITLE: Directories

DATES: 1989-

ARRANGEMENT: Chronological.

DESCRIPTION:

The directories, created by the Administrative Office of the Courts, provide access to the courts and its personnel. The directories contain names, addresses, and telephone numbers of court locations and court personnel throughout Utah, pictures of the judiciary, and a listing of federal, state, and county organizations with which the courts interact.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). The directories document court personnel for a given year including names, court locations, and photographs of the judiciary.

AGENCY: Administrative Office of the Courts

SERIES: 14046

TITLE: Directories

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Administrative Office of the Courts

SERIES: 11523

3

TITLE: Employment applications

DATES: 1989-

ARRANGEMENT: Chronological

DESCRIPTION:

Applications of those persons qualified to be listed on a register but who were not selected as the candidate for employment. If DHRM has officially delegated a particular state agency as the record copy office then they should retain these applications for three years.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Staff acquisition records, GRS-1964.

AUTHORIZED: 06-01-2015

FORMAT MANAGEMENT:

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

PRIMARY DESIGNATION:

Private UCA 63G-2-302 (1)(e) (2008)

SECONDARY DESIGNATION(S):

Public. UCA 63G-2-301 (1)(b) (2008)

AGENCY: Administrative Office of the Courts

SERIES: 29663

3

TITLE: Filed wills

DATES: -2017

ARRANGEMENT: Alphabetical.

DESCRIPTION:

A legal instrument which divides a person's possessions and assets among his/her beneficiaries. Wills are administered by probate courts if the need arises and give information concerning the executor of the estate, as well as the signatures of witnesses and attorneys involved. A will may be divided into several sections and cover a variety of topics regarding the estate.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series are authorized by the Administrative Office of the Courts.

APPROVED: 04/2008. Utah Court Retention Schedule (A)(6)(f)

FORMAT MANAGEMENT:

Paper: Retain in Office until administrative need ends and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or legal value(s).

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2018.

AGENCY: Administrative Office of the Courts

SERIES: 5130

TITLE: Financial Information Resources Management System (FIRMS) reports

1

DATES: 1989-2014.

ARRANGEMENT: Chronological

DESCRIPTION:

Includes the following: FICAA01T Trial balance monthly. FICAA05P Outstanding encumbrance. FICAA09P Outstanding reservation. FICAA10P Cash deposits. FICAA30P General ledger activity. FICAA85P Revenue and expenditure status by fund. FICAED01 Expenditure detail by sub-account. FICAES01 Expenditure status by sub-account. FICAES02 Work program/expenditure comparison by summary account. FICARD01 Revenue detail by sub-account within organization. FICARS01 Revenue status by sub-account. FICARS02 Estimated revenue/realized revenues. FICAER01 Expenditure/revenue summary by level 2. FICAMP01 Revenue account status by activity other than Dept. of Transportation.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. social security number

AGENCY: Administrative Office of the Courts

SERIES: 83952

3

TITLE: Newsletters

DATES: 1975-1997.

ARRANGEMENT: Chronological.

DESCRIPTION:

This series contains newsletters by the Administrative Office of the Courts concerning judicial activities and projects and is produced primarily for the legal profession. The newsletters contain information pertaining state and federal cases, new judicial appointments, seminars and conferences, and other issues related to judicial action. The newsletters are titled "Utah Judicial Briefs," "For the Record" and "Off the Record."

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

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

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

APPRAISAL:

These records have historical value(s).

Disposition based on the value of these records in documenting agency achievements, policies, programs, and function.

PRIMARY DESIGNATION:

Public

AGENCY: Administrative Office of the Courts

SERIES: 11522

3

TITLE: Personnel records

DATES: 1988-

ARRANGEMENT: Chronological, thereunder alphabetical by employee surname.

DESCRIPTION:

Complete work history of individual while employed by the State. Refer to UCA 67-18-1, et seq. and DHRM standards on accessing, maintaining, and managing employee personnel files. When an employee transfers to another state agency, the official personnel file must be sent to the new agency. The file should include current information on performance evaluations, performance plans, position description, career mobility agreement, insurance benefits notification (ADNT-1), job swap agreement, and overtime agreement where applicable. Also contains application for employment, employees' social security card (copy), Notice of personnel action (DHRM 33), Human resource profile/events (DHRM 34), Termination form (DHRM 35), Employment eligibility verification form, Exit interview form, New employee orientation self-guide, and retirement/deferred compensation plan notification (ADNT-2). May contain documentation on employee withholding, completion of course certificates, conflict of interest letters, incentive award results, letters of commendation, leave records, health records, and leave adjustment reports.

RETENTION:

Retain for 65 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Employment history records, GRS-1965.

AUTHORIZED: 04-16-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 64 years and then destroy.

AGENCY: Administrative Office of the Courts

SERIES: 11522

TITLE: Personnel records

(continued)

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Private UCA 63G-2-302 (1)(e) (2008)

SECONDARY DESIGNATION(S):

Public. UCA 63G-2-301 (1)(b) (2008)

AGENCY: Administrative Office of the Courts

SERIES: 22685

3

TITLE: Publications

DATES: 1978-1993.

ARRANGEMENT: Chronological.

DESCRIPTION:

This series contains documents created by the agency, including pamphlets, reports, leaflets, file manuals, and other published or processed documents. These records include information on administration, legal matters, fiscal and financial operations, crime, justice system, laws, records, and all other activities of the Administrative Office of the Courts. Also included are manuals and handbooks for clerks and justices from the district, circuit and justice courts. This series consists primarily of isolated publications not part of a more specific series.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently after microfilming.

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

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

APPRAISAL:

These records have historical value(s).

These records serve to document the history of the agency and to inform the public of the agency's services and programs.

PRIMARY DESIGNATION:

Public

AGENCY: Administrative Office of the Courts

SERIES: 5135

3

TITLE: Revenue distribution reports

DATES: 1987-1998.

ARRANGEMENT: Chronological

DESCRIPTION:

This monthly report documents the kind and amount of collections for each circuit court department and provides how the monies are distributed among the state, city, and county. The reports include the date, low organization number, depositor document number, court name, revenue source (i.e., bail forfeitures for city and county ordinances, fines for state statutes or local ordinances, wildlife resources fines and collection fees, state boating act fines and collection fees, victim restitution, intoxicated driver rehabilitation fee, 25% surcharge, civil and small claims filing fees, judges retirement, etc.), collection totals, distribution totals, state remittances, and signature of clerk of court.

RETENTION AND DISPOSITION AUTHORIZATION:

These records have historical value(s).

APPROVED: 07/1995

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Administrative Office of the Courts

SERIES: 5118

3

TITLE: Telephone bills

DATES: 1988-

ARRANGEMENT: Chronological

DESCRIPTION:

Originals and copies of tickets filed in support of telephone call payments.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Telephone bills, GRS-1832.

AUTHORIZED: 07-01-1990

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Administrative Office of the Courts

SERIES: 5129

1

TITLE: Warrant requests

DATES: 1988-

ARRANGEMENT: Numerical by warrant number.

DESCRIPTION:

Requests from state agencies to the Division of Finance to pay vendors for supplies and/or services the vendors have provided to the agencies.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. social security number