

Retention and Classification Report

Agency: West Jordan (Utah) (1321)

West Jordan
8000 South Redwood Road
West Jordan, UT 84088
801 569-5100

Records Officer: Melanie Briggs

21857	Adverse action files - city employees
24976	Billing report printout
27395	Board of adjustment case files
27785	Bond issue files
15114	Building permit files
21858	Case reports - criminal cases city employees
25001	Council minutes
26291	Customer application records
21856	Dog license records
25176	Performance bonds
25538	Personnel evaluations
27394	Planning and zoning case files
25000	Public utilities budget billing plan
20283	Residential building plans

AGENCY: West Jordan (Utah)

SERIES: 21857

3

TITLE: Adverse action files - city employees

DATES:

ARRANGEMENT:

DESCRIPTION:

These are case files and related records created in reviewing an adverse action (disciplinary or nondisciplinary removal, suspension, leave without pay, or reduction in force) against an employee. The file includes a copy of the proposed adverse action with supporting papers; statements of witnesses; employee's reply; hearing notices, reports, and decisions; reversal of action; and a record of appeals, excluding letters of reprimand which are normally filed in the official personnel files.

RETENTION:

Retain 3 years after case is closed.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 11/01/1996.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 3 years after case is closed and then destroy.

APPRAISAL:

This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 9, Item 16.

AGENCY: West Jordan (Utah)

SERIES: 21857

TITLE: Adverse action files - city employees

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: West Jordan (Utah)

SERIES: 24976

3

TITLE: Billing report printout

DATES: 1985-

ARRANGEMENT: Alphabetical by name

DESCRIPTION:

Form used to terminate closed billing water accounts. The form is only used to collect closing data for last billing account. Name, property address, forwarding address, and signature is collected on the form.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

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

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

APPRAISAL:

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 22, Item 5.

AGENCY: West Jordan (Utah)

SERIES: 24976

TITLE: Billing report printout

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: West Jordan (Utah)

SERIES: 27395

3

TITLE: Board of adjustment case files

DATES: 1980-

ARRANGEMENT: Numerical

DESCRIPTION:

These case files document the zoning activities of the Board of Adjustment. They are used to document the cases brought before the Board of Adjustment and its decisions. They contain the original application; findings and order; correspondence; and any exhibits such as plot plans or elevations.

RETENTION:

Retain 21 years

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1997.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 20 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office until administrative need ends.

AGENCY: West Jordan (Utah)

SERIES: 27395

TITLE: Board of adjustment case files

(continued)

APPRAISAL:

Administrative Historical This disposition is based on Utah
Municipal General Records Retention Schedule, Schedule 20,
Item 1.

PRIMARY CLASSIFICATION:

Public

AGENCY: West Jordan (Utah)

SERIES: 27785

3

TITLE: Bond issue files

DATES: 1960-

ARRANGEMENT: Alphabetical by name

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These files document the implementation of significant municipal bonds (i.e., revenue or special bonds), but not general obligation bonds. These files include authorizations supporting financial data, contracts or sales agreements, destruction certificates, and sample copies of bonds sold as evidence of municipal indebtedness.

RETENTION:

Retain 35 years

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 11/01/1996.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 5 years after after bond closing date and then transfer to State Records Center. Retain in State Records Center for 30 years and then transfer to State Archives with authority to weed.

AGENCY: West Jordan (Utah)

SERIES: 27785

TITLE: Bond issue files

(continued)

APPRAISAL:

Administrative Historical This disposition is based on Utah
Municipal General Records Retention Schedule, Schedule 2, Item
2.

This retention is based on the municipal general records
retention schedule 2-2.

PRIMARY CLASSIFICATION:

Public

AGENCY: West Jordan (Utah)

SERIES: 15114

3

TITLE: Building permit files

DATES: 1941-

ARRANGEMENT: Chronological by year, thereunder alphabetical by name.

ANNUAL ACCUMULATION:

DESCRIPTION:

These files contain the permits issued as official building authorization for a variety of actions (construction, demolition, the installation of plumbing, electrical or mechanical equipment and the erection of barricades). They contain inspection requests, inspection reports, certificates of occupancy and any pertinent information relating to the project. They may also contain water source, sewer system, flood plain, and tank certificates. The files are arranged numerically by permit number or alphanumerically by address.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1997.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 30 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office permanently.

AGENCY: West Jordan (Utah)

SERIES: 15114

TITLE: Building permit files

(continued)

APPRAISAL:

Administrative Historical This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 16, Item 2.

Permanent retention is based on Municipal General Schedule 16 item 2, which is based on the agency's indefinite administrative need for these records.

PRIMARY CLASSIFICATION:

Public

AGENCY: West Jordan (Utah)

SERIES: 21858

3

TITLE: Case reports - criminal cases city employees

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These are reports of crimes and other cases investigated by the police department. They contain all information as to the "who, what, where, why and how" of reported incidents. They are used for departmental information, follow-up investigation, and statistics. The Supplemental Continuation Reports are used to provide additional information concerning a police investigation. The reports are usually filed by case number and are frequently part of the case file. They are also called Incident Reports or Offense Reports.

RETENTION:

Retain 5 years

DISPOSITION:

Destroy provided not part of case file.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 5 years and then destroy provided not part of case file.

AGENCY: West Jordan (Utah)

SERIES: 21858

TITLE: Case reports - criminal cases city employees

(continued)

APPRAISAL:

This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 21, Item 7.

PRIMARY CLASSIFICATION:

Protected

AGENCY: West Jordan (Utah)

SERIES: 25001

3

TITLE: Council minutes

DATES: 1941-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

These minutes are the official record of the proceedings of regularly scheduled, special and emergency council meetings. They are adopted and approved by the council during their next public meeting. The minutes include the date, time, and meeting place; members present and absent; "the substance of all matters proposed, discussed, or decided, and record, by individual member, of votes taken; the names of citizens who appeared and the substance in brief of their testimony; any other information that any member requests be entered in the minutes" in accordance with UCA 52-4-7 (1997).

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1988.

FORMAT MANAGEMENT:

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

Paper: Retain in Office permanently.

AGENCY: West Jordan (Utah)

SERIES: 25001

TITLE: Council minutes

(continued)

APPRAISAL:

Administrative Historical This disposition is based on Utah
Municipal General Records Retention Schedule, Schedule 18,
Item 23.

PRIMARY CLASSIFICATION:

Public UCA 52-4-7(3)

SECONDARY CLASSIFICATION(S):

Private. UCA 63G-2-302(2)(d)

Protected. UCA 63G-2-305(32)

AGENCY: West Jordan (Utah)

SERIES: 26291

3

TITLE: Customer application records

DATES: 1941-

ARRANGEMENT: Alphabetical by name, thereunder chronological by year

ANNUAL ACCUMULATION:

DESCRIPTION:

These are applications completed by customers requesting water, sewer, or electric service. They are used for billing purposes. The applications include customer's name, address, and telephone number; meter information, date and approval signature(s).

RETENTION:

Retain permanently

DISPOSITION:

Retain in agency custody.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 10 years and then destroy.

Computer data files: Retain in Office permanently.

APPRAISAL:

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 22, Item 11.

AGENCY: West Jordan (Utah)

SERIES: 26291

TITLE: Customer application records

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private

AGENCY: West Jordan (Utah)

SERIES: 21856

3

TITLE: Dog license records

DATES:

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These records document the payment of license fees. They may include owner's name, breed of dog, sex, color, expiration date of license, expiration date of rabies vaccine, dog's name, indication if dog was neutered or spayed, license fee, and date paid.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1997.

FORMAT MANAGEMENT:

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

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

APPRAISAL:

This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 14, Item 6.

AGENCY: West Jordan (Utah)

SERIES: 21856

TITLE: Dog license records

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: West Jordan (Utah)

SERIES: 25176

3

TITLE: Performance bonds

DATES: 1977-

ARRANGEMENT: Alphabetical by name

ANNUAL ACCUMULATION:

DESCRIPTION:

These are various types of performance bonds (Surety, Escrow, Letter of credit) for subdivision improvements. These bonds are held until infrastructure improvements have been made to the subdivision. Bonds may be reduced by 25 percent by resolution. When infrastructure improvements are completed, bonds are totally released by resolution. Bonds are held so if infrastructures are not completed by the developer the City may collect on the bond.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1989.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 2 years after bond is released by resolution and then destroy.

APPRAISAL:

Administrative Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 2, Item 12.

AGENCY: West Jordan (Utah)

SERIES: 25176

TITLE: Performance bonds

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: West Jordan (Utah)

SERIES: 25538

3

TITLE: Personnel evaluations

DATES: 1941-

ARRANGEMENT: Chronological by year, thereunder alphabetical by name

ANNUAL ACCUMULATION:

DESCRIPTION:

Personnel Evaluations (Performance Appraisals) are used on an annual basis to rate and evaluate each employee. They are completed by each individual supervisor, with the final signed copy (supervisor, employee, and City Manager signatures) filed in their personnel file located in HR Office.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1988.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 5 years and then transfer to personnel file.

APPRAISAL:

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 9, Item 1.

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

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

AGENCY: West Jordan (Utah)

SERIES: 27394

3

TITLE: Planning and zoning case files

DATES: 1970-

ARRANGEMENT: Numerical

ANNUAL ACCUMULATION:

DESCRIPTION:

Planning and zoning case files include all aspects of the city's planning and zoning function. These files include applications, supporting documentation, copies of minutes, records of decision for conditional use permits, re-zoning and land use amendments, site plans, subdivision reviews, adopted Master Plan amendments, zoning ordinance amendments, street/alley vacating records, and other miscellaneous planning actions.

RETENTION:

Retain 53 years

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1997.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 50 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office until administrative need ends.

AGENCY: West Jordan (Utah)

SERIES: 27394

TITLE: Planning and zoning case files

(continued)

APPRAISAL:

Administrative Historical This disposition is based on Utah
Municipal General Records Retention Schedule, Schedule 20,
Item 5.

PRIMARY CLASSIFICATION:

Public

AGENCY: West Jordan (Utah)

SERIES: 25000

3

TITLE: Public utilities budget billing plan

DATES: 1994-

ARRANGEMENT: Alphabetical by name

ANNUAL ACCUMULATION:

DESCRIPTION:

Public utility budget billing plan with signature of customer, date signed, stating approval for the city to set up equal monthly payments for customer utility billing. The plan must be renewed each year.

RETENTION:

Retain 1 year.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/2003.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 1 year after renewal sign up date and then destroy.

APPRAISAL:

Administrative Fiscal

AGENCY: West Jordan (Utah)

SERIES: 25000

TITLE: Public utilities budget billing plan

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: West Jordan (Utah)

SERIES: 20283

3

TITLE: Residential building plans

DATES: 1970-

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

These are the blueprints and specifications submitted by building contractors or owners when applying for a building permit for the construction of residential buildings. The specifications are compiled by the architect for use by contractor to complete detail work providing type, grade, brand of materials to be used and general conditions which govern the methods to be employed. They also identify the temporary facilities, job cleanup, security, time limits, deadlines, and responsibilities of the architect, owner and contractor. They are used for determining code compliance and the enforcement of building codes. They are usually arranged by permit number or address.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1988.

FORMAT MANAGEMENT:

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

Paper: Retain in Office for 1 year after after completion and final inspection and then destroy.

APPRAISAL:

This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 16, Item 6.

AGENCY: West Jordan (Utah)

SERIES: 20283

TITLE: Residential building plans

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Protected. copyrights on plans