Retention and Classification Report

Agency: Washington County (Utah). County Assessor (2433)

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Records Officer

27646	Commercial personal property records
27647	Copy receipts
27648	DMV Abatements
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27652	Treasurer's receipts

AGENCY: Washington County (Utah). County Assessor

SERIES: 27646 3
TITLE: Commercial personal property records
DATES: 2001-
ARRANGEMENT: Chronological by year
DESCRIPTION:

These records include the paper copy of the Personal Property Affidavits aka Signed Statements (GRS 11-8 3 yrs), Personal Property Audits (GRS 11-9 5 yrs), & Refund Records aka BOE (GRS 11-14 3 yrs) for commercial personal property. These paper records have been scanned into the computer and the digital copy becomes the record copy. Once scanned, the paper records are used for back up purposes only.

RETENTION:

Retain 1 year

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 copy: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative
This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 1.

AGENCY: Washington County (Utah). County Assessor

SERIES: 27646
TITLE: Commercial personal property records

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27647 3
TITLE: Copy receipts
DATES: 2001-
ARRANGEMENT: Chronologically by year
DESCRIPTION:

These reports provide a daily record of cash balances, receipts, and disbursements.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1991.

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:

Fiscal
This disposition is based on Utah County General Records Retention Schedule, Schedule 5, Item 10.

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27648 3
TITLE: DMV Abatements
DATES: 2001-
ARRANGEMENT: Chronologically
DESCRIPTION:

These records are the carbon copy of the "Entitlement Notice" of the Abatement Application Files (County GRS 13-1). The original is scanned and then sent to the Clerk's Office and retained permanently with all Abatement Application Files.

RETENTION:

Retain 1 year

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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.

Computer data files backup: Retain in Office for 1 year and then delete.

Paper copy: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative Fiscal
This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 1.

AGENCY: Washington County (Utah). County Assessor

SERIES: 27648
TITLE: DMV Abatements

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 26709 3
TITLE: DMV Property Tax Distribution Report
DATES: 2001-
ARRANGEMENT: Chronological by date and thereunder by taxing district
DESCRIPTION:

These are daily reports from the Department of Motor Vehicles listing tax collections. The reports include transaction type and number, name, address, model year, make code, class code, processing county, assessing body, plat number, tax amount, daily totals, and deposit to the PTIF account.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1991.

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 1 year and then destroy.

APPRAISAL:

Administrative Fiscal
This disposition is based on Utah County General Records Retention Schedule, Schedule 11, Item 16.

AGENCY: Washington County (Utah). County Assessor

SERIES: 27649 3
TITLE: Mobile home personal property records
DATES: 2001-
ARRANGEMENT: Chronologically
DESCRIPTION:

These paper records include Personal Property Tax Notices (GRS 11-11 3 yrs), carbon copies of Mobile Home Entitlement Notices (Abatement Application Files GRS 13-1 permanent), Refund Records (BOE GRS 11-14 3 yrs), & Application for Residential Exemption.

RETENTION:

Retain 1 year

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 copy: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative Fiscal
This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 1.

PRIMARY CLASSIFICATION:

Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27651 3
TITLE: Personal property refunds
DATES: undated
ARRANGEMENT: chronological and then by account number
DESCRIPTION:

These records are personal property vehicle Board of Equalization (BOE) documents. The forms include value, rate and tax dollars in error and may contain name, address, taxing district, year and make of vehicle, value and tax amount paid, reason for refund and amount refunded. The assessor does not issue refunds but only recommends a refund to the county auditor. They are used for refunds made for double or erroneous payments of personal property tax.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1991.

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 Fiscal
This disposition is based on Utah County General Records Retention Schedule, Schedule 11, Item 14.

AGENCY: Washington County (Utah). County Assessor

SERIES: 27651
TITLE: Personal property refunds

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27650 3
TITLE: Personal property transaction reports
DATES: 2001-
ARRANGEMENT: Chronologically
DESCRIPTION:

These records include Tax Collection Reports aka Transaction Edit Listings printed daily and/or yearly. The report includes account number, tax year, taxing district, business or farm name, date, time, receipt number, amount, daily totals, and grand totals. They are used to report the personal property tax collections.

RETENTION:

Retain 2 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1991.

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 1 year and then destroy.

APPRAISAL:

Administrative Fiscal
This disposition is based on Utah County General Records Retention Schedule, Schedule 11, Item 16.

AGENCY: Washington County (Utah). County Assessor

SERIES: 27650
TITLE: Personal property transaction reports

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 27652 3
TITLE: Treasurer's receipts
DATES: undated
ARRANGEMENT: Chronologically
DESCRIPTION:

These records include personal property tax deposits made to the treasurer's office. They include the amount and date of deposit of monies into county accounts. They are used to show the amount and date of deposit of monies into county accounts.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1991.

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 Fiscal
This disposition is based on Utah County General Records Retention Schedule, Schedule 5, Item 11.

AGENCY: Washington County (Utah). County Assessor

SERIES: 27652
TITLE: Treasurer's receipts

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Washington County (Utah). County Assessor

SERIES: 26781 3
TITLE: tax appraisal records
DATES: 1900-
ARRANGEMENT: Numerical by parcel number
DESCRIPTION:

Tax appraisal records include complete information about the appraisal and assessment of real property. This information includes the taxpayer's name, property address, serial number, and legal property description including acreage. Information about improvements includes description, lists of taxable features, and photographs. Information is gathered in order to establish assessed valuations for land and improvements. Any board of equalization adjustments are also noted.

RETENTION:

Retain permanently

DISPOSITION:

Retain in agency custody.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1991.

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.

Computer data files: Retain in Office permanently.

Paper: Retain in State Records Center for 2 years and then transfer to State Archives with authority to weed.

APPRAISAL:

Administrative Fiscal Historical
This disposition is based on Utah County General Records Retention Schedule, Schedule 11, Item 1.

AGENCY: Washington County (Utah). County Assessor

SERIES: 26781
TITLE: tax appraisal records

(continued)

PRIMARY CLASSIFICATION:
Public