

# Retention and Classification Report

**Agency:** Naples (Utah) (688)

1420 East 2850 South  
Naples, UT 84078  
435 789-9090

**Records Officer:** Nikki Kay

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**AGENCY:** Naples (Utah)

**SERIES:** 25567

3

**TITLE:** Accounts payable

**DATES:** 1994-

**ARRANGEMENT:** Alphabetical by vendor name

**DESCRIPTION:**

These records are used to pay municipal bills. They include copies of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts.

**RETENTION:**

Retain 4 years

**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 4 years and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 1.

**AGENCY:** Naples (Utah)

**SERIES:** 25567

**TITLE:** Accounts payable

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25566

3

**TITLE:** Annual budget

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

The budget is a "plan of financial operations for a fiscal year which embodies estimates of proposed expenditures for given purposes and the proposed means of financing them" (UCA 10-6-106(10) (1997)). "Before June 22 of each fiscal year, or August 17 in the case of a property tax increase under Sections 59-2-919 through 59-2-923, the governing body shall by resolution or ordinance adopt a budget for the ensuing fiscal year for each fund for which a budget is required under this chapter. A copy of the final budget for each fund shall be certified by the budget officer and filed with the state auditor within thirty days after adoption" (UCA 10-6-118 (1997)).

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**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 permanently.

**APPRAISAL:**

Fiscal Historical This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 3, Item 1.

**AGENCY:** Naples (Utah)

**SERIES:** 25566

**TITLE:** Annual budget

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25337

3

**TITLE:** Annual financial audit report

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are reports prepared by external auditors examining and verifying the municipality's financial activities for the year. "The audit required for any fiscal year shall be completed within six calendar months after the close of the fiscal year" (UCA 51-2-2 (1997)). The audit is required to include "the financial statements; the auditor's opinion on the financial statements; a statement by the auditor expressing positive assurance of compliance with state fiscal laws identified by the state auditor; a copy of the auditor's letter to management that identified any material weaknesses in internal controls discovered by the auditor, and other financial issues related to the expenditure of funds received from federal, state, or local governments to be considered by management; and management's response to the specific recommendations" (UCA 51-2-3(1)(a) (1997)).

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**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 permanently after being microfilmed.

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

**AGENCY:** Naples (Utah)

**SERIES:** 25337

**TITLE:** Annual financial audit report

(continued)

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

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in Office permanently.

**APPRAISAL:**

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

**PRIMARY CLASSIFICATION:**

Public



**AGENCY:** Naples (Utah)

**SERIES:** 25569

3

**TITLE:** Annual financial reports

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are statistical reports on the financial affairs of the entire municipality. "Within 180 days after the close of each fiscal year the city recorder or other delegated person shall present to the governing body an annual financial report prepared in conformity with generally accepted accounting principles, as prescribed in the Uniform Accounting Manual for Utah cities (UCA 10-6-150 (1997)). "Copies of the annual financial report....shall be filed with the state auditor and shall be filed as a public document in the office of the city recorder" (UCA 10-6-150 (1997)).

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**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 permanently.

**APPRAISAL:**

Fiscal Historical This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 4.

**AGENCY:** Naples (Utah)

**SERIES:** 25569

**TITLE:** Annual financial reports

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25571

3

**TITLE:** Audit reports

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are reports prepared by external auditors examining and verifying the municipality's financial activities for the year. "The audit required for any fiscal year shall be completed within six calendar months after the close of the fiscal year" (UCA 51-2-2 (1997)). The audit is required to include "the financial statements; the auditor's opinion on the financial statements; a statement by the auditor expressing positive assurance of compliance with state fiscal laws identified by the state auditor; a copy of the auditor's letter to management that identified any material weaknesses in internal controls discovered by the auditor, and other financial issues related to the expenditure of funds received from federal, state, or local governments to be considered by management; and management's response to the specific recommendations" (UCA 51-2-3(1)(a) (1997)).

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**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 permanently.

**AGENCY:** Naples (Utah)

**SERIES:** 25571

**TITLE:** Audit reports

(continued)

**APPRAISAL:**

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

Audit reports may be used during the next audit cycle to monitor compliance with internal control program recommendations. They document agency functions and have research value.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25572

3

**TITLE:** Bank deposit books

**DATES:** 1994-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These books record municipal savings accounts. They include amounts, description of transaction, date, current balance, name of bank, and account numbers.

**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 4 years and then destroy.

**APPRAISAL:**

Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 6.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25574

3

**TITLE:** Bank statements

**DATES:** 1994-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are monthly statements showing the amount of money on deposit to the credit of the municipality showing date, name of bank, total deposit, withdrawals, and cash balance with interest on daily bank balances.

**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 4 years and then destroy.

**APPRAISAL:**

Administrative Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 7.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25568

3

**TITLE:** Budget information files

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These files document the adoption of the city's annual budget. Includes recommended budget, tape recordings of public hearings associated with finalizing budget, and all related correspondence. Files may also contain budget amendments and any other actions affecting budget.

**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 2 years after budget is adopted and then destroy.

**APPRAISAL:**

Administrative Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 3, Item 5.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25586

3

**TITLE:** Campaign financial disclosures

**DATES:** 2004-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These are financial statements required by law to be completed by municipal candidates in accordance with UCA 10-3-208 (1997). Each candidate for municipal office is required to report their itemized and total campaign contributions and expenditures at least once within two weeks before the election. The financial report must identify each contribution over \$50, the donor's name, and amount; and for each expenditure, the name of the recipient, and the amount of the expenditure. An ordinance should be adopted by each first and second class city and each third class city having a population of 10,000 or more, establishing campaign finance disclosure requirements for candidates for municipal offices.

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**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 permanently.



**AGENCY:** Naples (Utah)

**SERIES:** 25586

**TITLE:** Campaign financial disclosures

(continued)

**APPRAISAL:**

Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 3.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25573

3

**TITLE:** Check registers

**DATES:** 1994-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are multi-columnar records with chronologically arranged entries of checks. They usually include check numbers and amounts of debits or deposits per account.

**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 7 years and then destroy.

**APPRAISAL:**

Administrative Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 9.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25576

3

**TITLE:** City receipts

**DATES:** 1993-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are receipts issued for money received into municipal accounts from all sources. Includes date of payment, department, or fund to which money belongs, receipt number and amount paid.

**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 3 years and then destroy.

**APPRAISAL:**

Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 16.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25587

3

**TITLE:** Council agenda

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These files contain the public notification of date, time, place and items to be presented to City Council for consideration at regularly scheduled, special and emergency city council meetings.

**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 2 years and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 7.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25618

3

**TITLE:** Council business files

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These files contain copies of documents that council received as exhibits for regular or special city council meetings. They include copies of agenda, copies of ordinances and resolutions, special reports, and related correspondence. These files are also known as Council Exhibit Files and Council Agenda Files.

**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 10 years or until administrative need ends, which occurs later and then destroy.

**APPRAISAL:**

Administrative Historical This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 8.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 11787

3

**TITLE:** Council minutes

**DATES:** 1982-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are the official record of the proceedings of regularly scheduled, special and emergency council meetings. Includes date, time, and place of meeting, name of members in attendance and those absent, a record of subjects discussed, statements of intent, and a record of action taken.

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 07/01/2014.

**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.

**APPRAISAL:**

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 59.

**AGENCY:** Naples (Utah)

**SERIES:** 25336

3

**TITLE:** Council minutes

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year.

**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 07/01/2014.

**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 after being microfilmed.

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

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

Microfilm duplicate: Retain in Office permanently.

**AGENCY:** Naples (Utah)

**SERIES:** 25336

**TITLE:** Council minutes

(continued)

Microfilm duplicate: Retain in Office permanently.

**APPRAISAL:**

Administrative Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 59.

These records have evidentiary value and serve as a history of board and committee actions. They contain minutes of open committee and board meetings as required by UCA 52-4-7. (2005) Records may also include agenda, recordings, recordings and minutes of closed portions of meetings, and other supporting documentation.

**PRIMARY CLASSIFICATION:**

Public



**AGENCY:** Naples (Utah)

**SERIES:** 25589

3

**TITLE:** Election canvasses

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

They are the official canvass of primary, municipal, or special elections. They contain a tabulation of votes cast by combined election districts. They include the date, office, names of candidates, number of votes, and totals.

**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.

**APPRAISAL:**

Administrative Historical This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 13.

**AGENCY:** Naples (Utah)

**SERIES:** 25589

**TITLE:** Election canvasses

(continued)

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 11788

3

**TITLE:** Election returns

**DATES:** 1982-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are books of tabulations counted by the election judges. They serve as the official tally of votes for municipal elections.

**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 22 months and then destroy.

**APPRAISAL:**

This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 15.

**AGENCY:** Naples (Utah)

**SERIES:** 25584

3

**TITLE:** Employment applications (not hired)

**DATES:** 1994-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These files document the offering of municipal positions to potential employees. These files contain job offers which were declined. The accepted offers are maintained in individual personnel files.

**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 2 years after job closing deadline and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 9, Item 30.

**PRIMARY CLASSIFICATION:**

Private

**AGENCY:** Naples (Utah)

**SERIES:** 25579

3

**TITLE:** Garnishment records

**DATES:** 2002-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These are records of garnishments or levies for debts owed by employees which are attached to employees' earnings.

**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 3 years after garnishment ends and then destroy.

**APPRAISAL:**

Administrative Fiscal Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 8, Item 5.

**PRIMARY CLASSIFICATION:**

Private

**AGENCY:** Naples (Utah)

**SERIES:** 25575

3

**TITLE:** General ledgers

**DATES:** 1993-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are summaries showing the amount of receipts and disbursements of each department of the municipality. They may also include documentation from subsidiary ledgers to general ledger and accounting adjustments in the form of general entries.

**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 10 years and then destroy.

**APPRAISAL:**

Administrative Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 12.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25565

3

**TITLE:** Government Records Access and Management Act requests

**DATES:** 2001-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These request forms document individuals seeking access to municipal records as provided under UCA 63-2-204 (1997). They include requester's name, address, telephone number; date; record requested; date request received; whether access provided or denied; and date responded.

**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 1 year and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 1, Item 29.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25342

3

**TITLE:** Histories of Naples

**DATES:** 1928-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are published or unpublished histories written on the municipal government or an individual municipal agency. The histories are financed by municipal funds. They may include title, author, date written, and a historical narrative.

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 12/01/1996.

**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 permanently after being microfilmed.

Microfilm master: Retain in State Archives until microfilmed and then destroy provided microfilm has passed inspection.

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

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in Office permanently.



**AGENCY:** Naples (Utah)

**SERIES:** 25342

**TITLE:** Histories of Naples

(continued)

**APPRAISAL:**

Historical This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 1, Item 14.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25339

3

**TITLE:** Incorporation papers

**DATES:** 1982.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These files contain the constitution, bylaws and all amendments to city charters approved by the State Legislature (Constitution of Utah, Article XI, Section 5).

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 12/01/1996.

**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 permanently after being microfilmed.

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

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

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in Office permanently.

**AGENCY:** Naples (Utah)

**SERIES:** 25339

**TITLE:** Incorporation papers

(continued)

**APPRAISAL:**

Administrative Historical Legal This disposition is based on Utah  
Municipal General Records Retention Schedule, Schedule 18,  
Item 4.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25578

3

**TITLE:** Invoice registers

**DATES:** 1993-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These registers are numerical listings of check numbers of all checks issued by the municipality. They include vendor number, name, date of payment, invoice number, and/or purchase number, account debit, description of expenditure, and amount.

**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 7 years and then destroy.

**APPRAISAL:**

Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 26.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25966

3

**TITLE:** Leave data files

**DATES:** 1994-

**ARRANGEMENT:** Chronological by date.

**DESCRIPTION:**

These files contain compilations of leave earned and taken.  
Includes the annual leave compilation card.

**RETENTION:**

Retain 4 YEARS.

**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 4 years and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 8, Item 10.

**PRIMARY CLASSIFICATION:**

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

**AGENCY:** Naples (Utah)

**SERIES:** 25966

**TITLE:** Leave data files

(continued)

**SECONDARY CLASSIFICATION(S):**

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

**AGENCY:** Naples (Utah)

**SERIES:** 25590

3

**TITLE:** Oaths

**DATES:** 1982-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These files contain copies of signed oaths required of all officials of municipal offices, whether elected or appointed, before entering the duties of their respective offices (UCA 10-3-827 and 10-3-828 (1997)).

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 12/01/1996.

**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 permanently.

**APPRAISAL:**

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

This disposition is based on both the evidential and informational value of these records. They are important research tools. These oaths may be used to document the organization of the agency/office and to identify individual persons serving in elected and appointed positions.

**AGENCY:** Naples (Utah)

**SERIES:** 25590

**TITLE:** Oaths

(continued)

**PRIMARY CLASSIFICATION:**

Public



**AGENCY:** Naples (Utah)

**SERIES:** 11789

3

**TITLE:** Ordinances

**DATES:** 1982-

**ARRANGEMENT:** Numerical by ordinance number

**DESCRIPTION:**

These books contain the legislative action of city council to regulate, require, prohibit, govern, control, or supervise any activity, business, conduct, or condition authorized by UCA 10-3-701 to 714. An ordinance includes the title, preamble, an ordaining clause, subject of ordinance, when applicable, penalty of violation, effective date, signature of mayor or acting mayor, and municipal seal.

**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.

**APPRAISAL:**

This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 19.

Ordinances have legal value because they are municipal laws. They have historical value because ongoing ordinances document changes to the law over time.

**AGENCY:** Naples (Utah)

**SERIES:** 25341

3

**TITLE:** Ordinances

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These books contain the legislative action of city council to regulate, require, prohibit, govern, control, or supervise any activity, business, conduct, or condition authorized by UCA 10-3-701 to 715 (1997). An ordinance includes a number, a title, preamble, an ordaining clause, the body or subject of ordinance, when applicable, penalty of violation, effective date, signature of mayor or acting mayor, and municipal seal.

**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 after being microfilmed.

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

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in Office permanently.

**AGENCY:** Naples (Utah)

**SERIES:** 25341

**TITLE:** Ordinances

(continued)

**APPRAISAL:**

Administrative Historical Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 19.

Ordinances have legal value because they are municipal laws. They have historical value because ongoing ordinances document changes to the law over time.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25580

3

**TITLE:** Payroll register

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

This register is a numerical listing by check number and agency codes of all payroll checks issued by the municipality. It includes code, date, warrant number, name of employee, social security number, types and amounts of individual deductions, and may include hourly rate, and number of hours worked. Though this register is frequently used to reference specific payroll checks, it might be the only record of employee salaries and would then serve the same retirement purpose as the Employee earnings history files.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 03/01/2003.

**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 58 years and then destroy.

**APPRAISAL:**

Administrative Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 8, Item 12.

**PRIMARY CLASSIFICATION:**

Public

**SECONDARY CLASSIFICATION(S):**

Private. UCA 63G-2-302(1), UCA 63G-2-301(b)

**AGENCY:** Naples (Utah)

**SERIES:** 25583

3

**TITLE:** Personnel files

**DATES:** 1982-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These files are the official employment files for all municipal employees and usually include the original employment application, correspondence, credential files, letters of commendation, pay and leave history, work performance, training certificates, and evaluation forms.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 03/01/2003.

**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 65 years after date of employment or until 3 years after retirement or death and then destroy.

**APPRAISAL:**

Administrative Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 9, Item 12.

The history of a person's employment must be retained beyond the time he or she could potentially claim retirement benefits based on employment.

**PRIMARY CLASSIFICATION:**

Private

**AGENCY:** Naples (Utah)

**SERIES:** 25583

**TITLE:** Personnel files

(continued)

**SECONDARY CLASSIFICATION(S):**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25591

3

**TITLE:** Petitions

**DATES:** 1982-

**ARRANGEMENT:** Alphabetical by type

**DESCRIPTION:**

These files contain formal written petitions from citizens or municipal departments. Petitions state the issue of concern and list names and signatures of citizens requesting a particular action.

**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 after issue is resolved and then destroy.

**APPRAISAL:**

Administrative Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 20.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25338

3

**TITLE:** Planning commission minutes

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are minutes of meetings and hearings held by the planning commission. "Each municipality may enact an ordinance establishing a planning commission" (UCA 10-9-201(1)(a)(1997)). A municipal planning commission shall "prepare and recommend a general plan and amendments to the general plan; recommend zoning ordinances and maps, amendments to zoning ordinances and maps; administer provisions of the zoning ordinance; recommend subdivision regulations and amendments to those regulations; recommend approval or denial of subdivision applications; advise the legislative body of matters as the legislative body directs; hear or decide any matters that the legislative body designates, including the approval or denial of, or recommendations to approve or deny, conditional use permits; exercise any other powers that are necessary to enable it to perform or function, or delegated to it by the legislative body" (UCA 10-9-204 (1997)).

**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 permanently after being microfilmed.

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



**AGENCY:** Naples (Utah)

**SERIES:** 25338

**TITLE:** Planning commission minutes

(continued)

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

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in Office permanently.

**APPRAISAL:**

Administrative Historical This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 20, Item 4.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25592

3

**TITLE:** Proof of publication

**DATES:** 1990-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These files contain evidence of the publication of a document or public notification appearing in a local newspaper, usually for hearings, sale of bonds, budget, and council meetings (UCA 78-25-14 (1997)).

**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 6 years and then destroy.

**APPRAISAL:**

Administrative Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 21.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25585

3

**TITLE:** Quarterly wage list

**DATES:** 1993-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These are reports submitted quarterly to the State Department of Employment Security. They include the quarterly wage list (the name and address of employer, registration number, quarter ending date, employee social security number, name of employee, hire date of new employees, and total wages for quarter, the reimbursable employment, payrolls, and new hires report form (name and address of organization, non-insured workers, individual amount for the first, second, third and fourth quarters, insured workers' names; telephone number, and department of person completing form)).

**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 2 years and then destroy.

**APPRAISAL:**

Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 9, Item 29.

**PRIMARY CLASSIFICATION:**

Private

**AGENCY:** Naples (Utah)

**SERIES:** 25340

3

**TITLE:** Resolutions

**DATES:** 1928-

**ARRANGEMENT:** Chronological by year thereunder by number

**DESCRIPTION:**

These are formal statements of a decision, or expression of opinion put before or adopted by the city council. They may perform the same function as an ordinance. Resolutions may include the following: establishing water and sewer rates, charges for garbage collection and fees charged for municipal services, establishing policies and guidelines, and regulating the use and operation of municipal property (UCA 10-3-717 (1997)).

**RETENTION:**

Retain permanently.

**DISPOSITION:**

Retain in agency custody.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 12/01/1996.

**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 permanently after being microfilmed.

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

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

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in Office permanently.

**AGENCY:** Naples (Utah)

**SERIES:** 25340

**TITLE:** Resolutions

(continued)

**APPRAISAL:**

Administrative Historical Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 18, Item 22.

Resolutions are similar to ordinances. Resolutions have legal value because they are municipal laws. They have historical value because ongoing resolutions document changes to the law over time.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25967

3

**TITLE:** Retirement files

**DATES:** 1994-

**ARRANGEMENT:** CHRONOLOGICAL BY DATE

**DESCRIPTION:**

These are reports and register control documents relating to employee's retirement.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 07/01/2004.

**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 65 years after DATE OF RETIREMENT or until 3 YEARS AFTER DEATH WHICHEVER IS EARLIEST and then dest

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 9, Item 12.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25621

3

**TITLE:** Sales and use tax return forms

**DATES:** 1994-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These forms are required by the State Tax Commission to report quarterly sales tax and to remit the amounts collected and due to the state (e.g., municipal recreational facilities).

**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 4 years and then destroy.

**APPRAISAL:**

Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 18.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25619

3

**TITLE:** Taxable wage earning reports

**DATES:** 1982-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These files contain records on individual employee income taxes. Includes returns filed for income taxes such as IRS Form W-2, reports on withheld federal taxes such as IRS Form W-3 with related papers, and reports relating to income and social security taxes.

**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 4 years and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 8, Item 22.

**PRIMARY CLASSIFICATION:**

Private UCA 63G-2-302(1)



**AGENCY:** Naples (Utah)

**SERIES:** 25581

3

**TITLE:** Time sheets

**DATES:** 1982-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These are records which verify hours worked, sick leave, vacation, overtime, and holidays earned and taken by municipal employees.

**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 and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 8, Item 14.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25577

3

**TITLE:** Travel request forms

**DATES:** 1993-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These files contain records relating to the reimbursement of employees for authorized travel. They may include travel orders, per diem vouchers, transportation request, hotel reservations, and all supporting papers documenting official travel by officers, employees, dependents, or others authorized by law to travel. These are authorization forms for municipal officials or employees to use a private vehicle for municipal business when it is the most economical method of travel.

**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 3 years and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 5, Item 16.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** Naples (Utah)

**SERIES:** 25620

3

**TITLE:** Wage survey files

**DATES:** 1994-

**ARRANGEMENT:** Chronological by year

**DESCRIPTION:**

These files contain wage survey reports and data; working papers and related correspondence pertaining to area wages paid for each employee class; background papers establishing need, authorization, direction, and analysis of wage surveys; development and implementation of wage schedules; and development of specific rates (excluding authorized wage schedules and wage survey recapitulation sheets).

**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 until completion of second succeeding wage survey and then destroy.

**APPRAISAL:**

Fiscal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 8, Item 15.

**PRIMARY CLASSIFICATION:**

Public

**SECONDARY CLASSIFICATION(S):**

Private

**AGENCY:** Naples (Utah)

**SERIES:** 25582

3

**TITLE:** Workers compensation claim files

**DATES:** 1992-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These are files containing claims for on-the-job injuries or job related disabilities under the Workers' Compensation Act (Title 34, Chapter 9). A report is filed with the Utah Industrial Commission.

**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 10 years after final settlement and then destroy.

**APPRAISAL:**

Administrative Legal This disposition is based on Utah Municipal General Records Retention Schedule, Schedule 8, Item 16.

**PRIMARY CLASSIFICATION:**

Private