

## Retention and Classification Report

**Agency:** Dept. of Health. Office of Budget (51)

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**Records Officer:** \_\_\_\_\_

16711	*Appropriations act file
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**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16711

3

**TITLE:** Appropriations act file

**DATES:** 1983-1995.

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

This is a record of the department budget as approved by the legislature. The Appropriations Request File contains the information as to what the department requested. This file tells what the department actually received. It includes a listing of all proposed expenditures and anticipated revenues for the fiscal year. This information is given for the department as a whole, for line items, for individual programs, for travel and current expenses, for the following personal information: employee's name, grade/step, job title, and previous and current salaries.

**RETENTION:**

Permanent. Retain for 3 year(s)

**DISPOSITION:**

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 3 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

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

This record is of permanent value in showing how the state spent its resources in the field of health care.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16711

**TITLE:** Appropriations act file

(continued)

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16710

3

**TITLE:** Appropriations request file

**DATES:** 1983-1995.

**ARRANGEMENT:** None.

**DESCRIPTION:**

This is the department's budget request for the fiscal year. This is submitted to the Governor's Office according to UCA 63-38-2(4), so that the Governor's Office can prepare a comprehensive statewide budget. It includes a listing of all proposed expenditures and anticipated revenues for the fiscal year. This information is given for the department as a whole, for line items, for individual programs, for travel and current expenses, for capital outlay, for leases, and for building blocks. The file also contains the following personal information: employee's name, grade/step, job title, and previous and current salaries.

**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 3 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). This information is of permanent value because it helps document the activities of the department, the way the department spent its funds and how they determined their priorities.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16713

3

**TITLE:** Budget background materials

**DATES:** 1984-1995.

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

These are materials used to prepare the budget and to evaluate trends in funding and expenditures. They include divisional budget information, appropriation requests, annual work programs, records of expenditures and revenues, and correspondence and memoranda.

**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 transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).  
In order for the bureau to determine trends in the budget activities, they need to retain three years of records. There is no other need for this information.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16709

3

**TITLE:** Contracts file

**DATES:** 1986-1995.

**ARRANGEMENT:** Alphabetical.

**DESCRIPTION:**

This is a duplicate copy of all contracts between the department and persons, firms, or organizations performing services for the department. The copy goes to the bureau as part of the approval process. The file includes the signatures of the authorizing officials, copies of bills received, and copies of warrant requests.

**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 6 months and then destroy.

**APPRAISAL:**

These records have administrative value(s).

The only use for this record is as a reference or back up during the approval process. Once the contract has been approved, numerous other copies are distributed, making this copy unnecessary.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16705

3

**TITLE:** Correspondence file

**DATES:** 1985-1995.

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

These are the complete files of all the correspondence and memoranda generated by the bureau. These files include correspondence and memoranda within the bureau, with other Health Department bureaus, with other state agencies and with the general public.

**RETENTION:**

Retain for 3 month(s)

**DISPOSITION:**

Destroy.

**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 3 months or until no longer needed and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16714

3

**TITLE:** Grant/contract proposal request to proceed

**DATES:** 1986-1995.

**ARRANGEMENT:** None.

**DESCRIPTION:**

This is a new form devised by the department to ensure that all requests for non-state appropriated financial assistance are reviewed for consistency with established department policy. This request must be approved before the application for funds can be sent. It includes the date of the request, the requesting organization, the title and type of proposal, the starting date of the project, the duration of the project, the amount requested, how funds will be expended, the disposition of the program when the funds expire, whether the proposal was solicited or not, and an abstract of the proposal including what it hopes to accomplish and why.

**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 destroy.

**APPRAISAL:**

These records have administrative value(s).

The purpose of the record is for management control. After one year, the record's administrative value should be finished.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.



**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16708

3

**TITLE:** Grants file

**DATES:** 1984-1995.

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

These are copies of grant proposals forwarded to the bureau for review before being forwarded to the department director for signature. The purpose of the review is to ensure that the applications are filled out correctly and completely. This is also used by the bureau to keep track of incoming federal funds for future budget planning. They include Notice of Intent, Application for Federal Assistance, and Award letters. Information includes the name of the bureau of division applying for the grant, the grant number, the department's employer identification number, the title of the grant project, the area of project impact, the estimated number of persons benefiting, the type of assistance, the amount of proposed funding, the congressional districts involved, the starting date of the project, and the approving signatures.

**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 3 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).

This record is duplicated at the bureau which is requesting the grant. Any audits conducted on the grant are done at the bureau, and the copy at the bureau is scheduled according to federal requirements. The only value of this copy is administrative, and the bureau indicates that a three year retention will suffice for administrative use.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16708

**TITLE:** Grants file

(continued)

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16706

3

**TITLE:** Internal correspondence

**DATES:** 1983-1995.

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

This is correspondence and memoranda that originate in the Health Department outside the bureau. This consists mainly of procedural memos used by the bureau as reference material.

**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 2 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).

As this correspondence originates elsewhere, the only use for this record is administrative. Once that is over, there is no further need to keep the record.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16715

3

**TITLE:** Purchase requisitions

**DATES:** 1983-1995.

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

These are purchase requisitions submitted by the bureau itself for its own needs. The information on these requisitions includes the name and low org number of the bureau, the date of the requisition, the purchase order number, the item number, the quantity and unit, the description and specifications of the items, the unit price and the total amount of the purchase.

**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 3 years and then destroy.

**APPRAISAL:**

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

The retention is based on administrative use as stated by the bureau staff.

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.

**AGENCY:** Department of Health. Bureau of the Budget

**SERIES:** 16707

3

**TITLE:** Supervisor's personnel files

**DATES:** 1981-1995.

**ARRANGEMENT:** Alphabetical.

**DESCRIPTION:**

These are duplicate personnel records that are maintained by the bureau to enable management to monitor leave activity and personnel actions. They include leave applications, personnel action request forms, and compensatory time log. Information includes the employee's name, address, social security number, position title, and record of leave.

**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 destroy.

**APPRAISAL:**

These records have administrative value(s).

As the information in this record is duplicated at the division level, a one year retention should suffice for administrative use.

**PRIMARY DESIGNATION:**

Private

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2017.