

## Retention and Classification Report

**Agency:** Davis County (Utah).\$bPersonnel Office (260)

Davis Co. Administration Building  
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**Records Officer:** \_\_\_\_\_

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**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27780

1

**TITLE:** Active personnel files

**DATES:** 1954-2021.

**ARRANGEMENT:** Alphabetical

**DESCRIPTION:**

These files are the official employment files for all Davis County employees and usually include the original employment application; correspondence; credential files; copies of transcripts; Code of Conduct agreements; letters of commendation; pay and leave history; work performance, performance plans and evaluations; copies of any documents affecting the employee's conduct, status, and salary; training certificates and evaluation forms; Form 1-9 and other documents required by the U.S. Citizenship and Immigration Services; employee-signed overtime agreements; personnel actions; corrective action plans; notices of disciplinary action; new employee orientation form checklists, letters of appreciation/commendation; separation and leave without pay records; garnishments; employee benefits notification forms for Public Employee Health Plan (PEHP) and Utah Retirement Services (URS); references; and training certifications or preparations. These files also apply to temporary employees and exempt-status employees performance appraisal. These files contain the complete work history of an individual (excluding medical/psychological information), while employed by the county.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after date of separation and then weed, move to "Terminated Personnel Files," & film.

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Private Utah Code 63-G-302(g)(2016)

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27780

**TITLE:** Active personnel files

(continued)

**SECONDARY DESIGNATION(S):**

Public. Utah Code 63-G-301(1)(b) (2014)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 01/2021.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27784

3

**TITLE:** Adverse action investigation files

**DATES:** 1985.

**ARRANGEMENT:** Alphabetical

**DESCRIPTION:**

These records support the agency's function to manage its human resources. Records document the investigation of potential disciplinary action against employees. Records include the initial complaint, final decision, and supporting documentation. Records for investigations that result in disciplinary action are part of the employee's personnel file.

**RETENTION:**

Retain until separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Complaint investigation files, GRS-1969.

**AUTHORIZED:** 05-01-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 7 years after end of employment and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Protected 63G-2-305(10)(2015)

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27784

**TITLE:** Adverse action investigation files

(continued)

**SECONDARY DESIGNATION(S):**

Private. 63G-2-302(1)(g)&(2)(d)(2015)

Public. 63G-2-301(3)(o)(2014)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 04/2023.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 7614

3

**TITLE:** Hiring register

**DATES:** 1982-ca.1996.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

This register lists either the names of persons receiving test scores above the names of 80 percent or the top six candidates meeting advertised qualifications who are available for personal interviews. It documents the hiring process. The register includes date, position, department, grade, salary, dates position opened and closed, candidates' names and social security numbers, and test scores.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**APPROVED:** 12/1991

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).

This retention is based upon the administrative needs expressed by the bureau and meets the retention for Eligibility register in the County Personnel Schedule, Schedule 8, item 4 (approved September 1991).

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27781

1

**TITLE:** Insurance policy files

**DATES:** 1985.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are insurance policy contracts between the county and private insurers.

**RETENTION:**

Retain for 15 year(s) after expiration of contractual agreement

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 15 years after expiration of policy or settlement of all claims and then destroy.

**APPRAISAL:**

These records have fiscal value(s).

**PRIMARY DESIGNATION:**

Public

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 04/2023.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 25112

3

**TITLE:** Liability claims risk management files

**DATES:** 1992-

**ARRANGEMENT:** Chronological, thereunder numerical by case number.

**DESCRIPTION:**

These are liability claims for and against the County. They may include legal documents, photos, accident reports, statements, and insurance reports, involved in the investigation and settlement of claims.

**RETENTION:**

Retain for 20 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Liability risk management case files, GRS-2013.

**AUTHORIZED:** 04-03-2018

**FORMAT MANAGEMENT:**

Microfilm master: Retain in Archives for 20 years and then destroy.

Microfilm duplicate: For records prior to and including 2011.  
Retain in Office for 20 years and then destroy.

Paper: Retain in Office until scanned and then destroy.

Computer data files: Retain in Office for 20 years after the case is closed and then delete.

**APPRAISAL:**

These records have legal value(s).



**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 25112

**TITLE:** Liability claims risk management files

(continued)

**PRIMARY DESIGNATION:**

Protected UCA 63G-2-305 (23)

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27782

3

**TITLE:** Loss control inspection reports

**DATES:** 1985.

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

Each year a county agency may undertake self-inspection to identify potential hazards within their buildings or on their grounds. If the agency completes this report, they can get a 15 percent discount on their premium after a follow-up survey has been conducted. This record might also be used as evidence in defense of a claim.

**RETENTION:**

Retain for 12 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Loss control inspection reports, GRS-199.

**AUTHORIZED:** 04-20-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 12 years and then destroy.

**APPRAISAL:**

These records have fiscal value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27782

**TITLE:** Loss control inspection reports

(continued)

**SECONDARY DESIGNATION(S):**

Protected. UGA 63-G-304(23) (2008)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 04/2023.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 7616

3

**TITLE:** Payroll ledgers

**DATES:** unknown.

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

these ledgers contain a list of each check number written within  
a pay period, amount, and name of department, employee's name.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Payroll  
processing records, GRS-1903.

**AUTHORIZED:** 07-01-2015

**FORMAT MANAGEMENT:**

Paper: Retain in Office until microfilmed and then destroy  
provided microfilm has passed inspection.

Microfilm master: Retain in Office for 4 years and then destroy.

**PRIMARY DESIGNATION:**

Private

**SECONDARY DESIGNATION(S):**

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

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 30646

3

**TITLE:** Terminated employee records

**DATES:** 2014-

**ARRANGEMENT:** Alphabetical by employee name.

**DESCRIPTION:**

These records capture the employment history documents the application, hiring, cumulative salary, and employment of personnel whose employment was terminated with Davis County. Record may include those necessary to calculate benefits, and can include employee details, department and position information, earnings, deductions, and other records. Final actions taken as a result of disciplinary action may also be included in this series.

**RETENTION:**

Retain for 65 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**AUTHORIZED:** 01-26-2023

**FORMAT MANAGEMENT:**

Computer data files: Retain in Office for 65 years and then delete.

Paper: Retain in Office until scanned and then transfer to State Records Center. Retain in State Records Center for 65 years and then destroy.

**APPRAISAL:**

These records have legal value(s).

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 30646

**TITLE:** Terminated employee records

(continued)

**PRIMARY DESIGNATION:**

Private Utah 63G-2-302(1)(g)(2023).

**SECONDARY DESIGNATION(S):**

Public. Utah Code 63G-2-302(1)(f)(2023).

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 7615

3

**TITLE:** Terminated personnel files

**DATES:** 1953-2003.

**ARRANGEMENT:** Alphabetical by name.

**DESCRIPTION:**

These records are created to meet the retention schedules of pertinent records created for Active Personnel Files when an employee's status is changed to inactive. These records are used for long-term reference for retirement, re-hires, etc. Records contain personnel history records. Files may also include application, discipline letters, performance appraisals, etc. The Active Personnel Files are purged one year after an employee's termination and records which are not pertinent are removed and destroyed. Medical records are integrated into the files.

**RETENTION:**

Retain for 65 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**AUTHORIZED:** 01-26-2023

**FORMAT MANAGEMENT:**

Paper: Retain in Office until scanned into database and then destroy.

Microfilm master: For records beginning in 1984 through 2003. Retain in State Archives permanently.

Computer data files: Retain in Office for 65 years or until microfilmed and then delete provided microfilm has passed inspection.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 7615

**TITLE:** Terminated personnel files

(continued)

**APPRAISAL:**

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

Records provide evidence of employee's legal right to benefits.

**PRIMARY DESIGNATION:**

Private

**SECONDARY DESIGNATION(S):**

Public. Utah Code 63G-2-302(1)(f) (2017)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 09/2023.



**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27734

3

**TITLE:** Volunteer background files

**DATES:** 2005.

**ARRANGEMENT:** Alphabetical by last name

**DESCRIPTION:**

These records are created to verify that a volunteer is not a risk to patrons participating in Davis County programs, such as the senior services, children in library, etc. These records include the name, address, Social Security number, phone number, birth date, drivers license number, and fingerprints. Records may also include a criminal history.

**RETENTION:**

Retain for 5 year(s) after separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Volunteer files, GRS-1963.

**AUTHORIZED:** 04-01-2012

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years after termination and then destroy.

**APPRAISAL:**

These records have administrative, and/or legal value(s).  
UCA 78B-4-103 provides that an entity is not liable for the acts or omissions of volunteers unless the entity knew or should have known of the volunteer's unfitness to provide the services.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27734

**TITLE:** Volunteer background files

(continued)

**PRIMARY DESIGNATION:**

Private

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 04/2023.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27838

3

**TITLE:** Wellness program health risk assessment (HRA) files

**DATES:** 1999-2023.

**ARRANGEMENT:** alphabetical by name thereunder by year

**DESCRIPTION:**

By participating in this program Davis County is able to reduce insurance costs, by encouraging better health for employees.

The purpose of these records are to make employees aware of their health and any risk factors.

These records contain employee's name, home address, home and work phone, birth date , height, weight, blood pressure, blood work, use of tobacco and/or alcohol, etc. These files may also include follow up in attendance to classes, return doctor visits, etc.

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Employee health and medical records, GRS-1968.

**AUTHORIZED:** 11-24-2020

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then destroy.

**APPRAISAL:**

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

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27838

**TITLE:** Wellness program health risk assessment (HRA) files

(continued)

**PRIMARY DESIGNATION:**

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

**SECONDARY DESIGNATION(S):**

Controlled. UCA 63G-2-304

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 08/2023.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27837

1

**TITLE:** Wellness program participation files

**DATES:** 1999-2023.

**ARRANGEMENT:** alphabetical by name thereunder by year

**DESCRIPTION:**

These records track participation in the Wellness Program by employees and rewards those who are actively working at improving and maintaining a good quality of health and lifestyle.

These records are used to track participation in the Wellness Program of employees to determine eligibility for rewards.

These records contain the employee's name, department, business phone, their activity level, what activities they participated in, the various challenges: Project Zero, Hoops for Health, biking challenge, 5K challenge, nutrition Bingo, etc. Preventative care form can also be attached: mammogram, colonoscopy, physical, etc.

**RETENTION:**

Retain for 2 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years and then destroy.

**APPRAISAL:**

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

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 27837

**TITLE:** Wellness program participation files

(continued)

**PRIMARY DESIGNATION:**

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

**SECONDARY DESIGNATION(S):**

Controlled. UCA 63G-2-304

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 08/2023.

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 21983

3

**TITLE:** Workers compensation claim records

**DATES:** 1980-

**ARRANGEMENT:** Chronological, thereunder numerical by case number

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

These files may contain forms, correspondence and related medical and investigatory records relating to on-the-job injuries, whether or not a claim for compensation was made.

**RETENTION:**

Retain for 75 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Worker's compensation case files, GRS-1938.

**AUTHORIZED:** 01-23-2019

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 75 years and then destroy.

Microfilm master: Retain in Archives for 75 years and then destroy.

Microfilm duplicate: Retain in Office for 75 years and then destroy.

**APPRAISAL:**

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

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 21983

**TITLE:** Workers compensation claim records

(continued)

**PRIMARY DESIGNATION:**

Private



**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 7617

3

**TITLE:** Year end payroll ledgers

**DATES:** 1972-

**ARRANGEMENT:** Alphabetical by name

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These annual ledgers list payroll amounts at the end of the calendar year. Ledgers list employee's name, department, ID number, gross pay, net pay, all payroll deductions and benefits by pay period for the year. They are created from information obtained from payroll registers.

**RETENTION:**

Retain for 65 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Employee wage history records, GRS-1905.

**AUTHORIZED:** 07-01-2015

**FORMAT MANAGEMENT:**

Paper: Retain in Office until microfilmed and then destroy provided microfilm has passed inspection.

Microfilm master: Retain in Archives for 65 years and then destroy.

Microfilm duplicate: Retain in Office for 65 years and then destroy.

**APPRAISAL:**

These records have fiscal value(s).

**AGENCY:** Davis County (Utah). Department of Human Resources

**SERIES:** 7617

**TITLE:** Year end payroll ledgers

(continued)

**PRIMARY DESIGNATION:**

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