Retention and Classification Report

Agency: Fillmore (Utah) (392)

75 West Center
Fillmore, UT 84631
435 743-5314

Records Officer: _____

12079	Accounts payable
12078	Accounts receivable
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12054	Utility accounts receivable

AGENCY: Fillmore (Utah)

SERIES: 12079 3
TITLE: Accounts payable
DATES: undated
ARRANGEMENT: Numerical by vendor number and name
DESCRIPTION:

These are records used to pay municipal bills. Files consist of copy of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts (UCA 70A-2-725).

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12078 3
TITLE: Accounts receivable
DATES: undated
ARRANGEMENT: Numerical by account number
DESCRIPTION:

These files consist of copies prepared by municipalities to collect amounts owed by vendors, organizations, and citizens having accounts with municipal agencies (UCA 70A-2-725).

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12050 3
TITLE: Beer license application files
DATES: undated
ARRANGEMENT: Numerical by account number
DESCRIPTION:

These files contain completed applications to obtain licenses for selling beer within municipal boundaries per local ordinances. Applicants are also required to file a cash or corporate bond "to guarantee faithful performance" (UCA 32-4-4).

RETENTION:

Retain for 3 year(s) after expiration of permit or license

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 01-17-2020

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after expiration and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12049 1
TITLE: Building permit files
DATES: undated
ARRANGEMENT: Numerical by application number
DESCRIPTION:

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

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12051 3
TITLE: Business license files
DATES: undated
ARRANGEMENT: Alphanumerical by name and account number
DESCRIPTION:

These files contain information on all business licenses issued in the municipality. All businesses are required to be licensed before conducting within municipal boundaries. They contain the application, proof of payment, and approval forms from regulatory departments (e.g., fire, police, health).

RETENTION:

Retain for 3 year(s) after expiration of permit or license

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 01-17-2020

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after final renewal and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12083 3
TITLE: Cemetery records
DATES: undated
ARRANGEMENT: Alphabetical by last name
DESCRIPTION:

These are registers of names of all persons owning burial plots in the cemetery. They include deed number, date issued, name of owner, description of property, amount paid, receipt number, perpetual care record, date issued, and certificate number. This register is also called "Burial Right" Registers or Payment Records.

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 11-14-2018

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12045 3
TITLE: Contracts and agreements files
DATES: undated
ARRANGEMENT: Alphabetical by name
DESCRIPTION:

These files contain official agreements enforceable by law, to acquire or incur services and products under $ 2,000.00. File may also include utility agreements, cosignatory agreement, deferral agreement, payments agreements, ordinances, bonds, job specification books, and related correspondence.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12072 3
TITLE: Council minutes
DATES: 1852-
ARRANGEMENT: Chronological by meeting date.
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:

Permanent. Retain until administrative need ends

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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Error - Format Type is invalid.
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Paper: Retain in Office permanently or until administrative need ends and then transfer to State Archives with authority to weed.

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

APPRAISAL:

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

This series has permanent historical value as documentation of function and actions of the city council.

AGENCY: Fillmore (Utah)

SERIES: 12072
TITLE: Council minutes

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12393 3
TITLE: Death and burial registers
DATES: 1854-
ARRANGEMENT: Generally chronological by death or burial date.
DESCRIPTION:

The volumes in this series document deaths and burials for persons buried in the Fillmore City Cemetery. Ledger columns vary between volumes but may include the line number, name of the deceased, date of death, age, cause of death, place of birth, date of birth, gender, parents' names, physician or nurse, grave locations, race, color, last place of residency, term of residence, marital status, and occupation. The first volume also includes a survey map of the cemetery as well as a record of lot ownership which includes the name of the purchaser, the location of the grave, the date of the sale, and the payment amount. Ownership records are entered by date of sale.

RETENTION:

Permanent. Retain until administrative need ends

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Burial records, GRS-286.

AUTHORIZED: 11-14-2018

FORMAT MANAGEMENT:

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Paper: Retain in Office permanently after being microfilmed or until administrative need ends and then transfer to State Archives with authority to weed.

Microfilm master: Retain in State Archives permanently.

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

AGENCY: Fillmore (Utah)

SERIES: 12393
TITLE: Death and burial registers

(continued)

APPRAISAL:

These records have historical value(s).

This disposition is based on the value these records have in documenting deaths and burials in Fillmore.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private.	More recent records may record the cause of death, taken from a private death certificate. This information should remain private for 50 years, in accordance with Utah Code 26-2-22.

AGENCY: Fillmore (Utah)

SERIES: 12046 3
TITLE: Dog license files
DATES: 1988-
ARRANGEMENT: Numerical by license number
DESCRIPTION:

These files document the payment of license fees. They include: owner's name, breed of dog, sex, color, expiration date of license; expiration date of rabies vaccine, name of dog, indication if dog was altered, license fee, and when paid.

RETENTION:

Retain for 5 year(s) after expiration of permit or license

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 04-03-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12847 3
TITLE: Enterprise funds billing registers
DATES: undated
ARRANGEMENT:
DESCRIPTION:

This register consists of an itemized list of customer accounts. It is used for reference purposes. They include name of customer, service address, meter reading, water usage, water and sewer changes, payments, adjustments, prior balance due, and current balance due.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then destroy.

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12081 1
TITLE: Financial statements
DATES: 1903-
ARRANGEMENT: Chronological
DESCRIPTION:

One copy is sent to taxpayer and a duplicate is retained by treasurer to validate when paid. It is used as a record of payments on the assessment and for audit purposes. It includes name and address, treasurer's receipt number, block and lot numbers.

RETENTION:

Retain for 3 year(s) after final action

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 3 years after final payment is made and then destroy.

Microfilm master: Retain in Office permanently.

Microfilm duplicate: Retain in Office for 3 years after final payment made and then destroy.

APPRAISAL:

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

This disposition is based on

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12082 3
TITLE: General ledgers
DATES: undated
ARRANGEMENT: Numerical by ledger number
DESCRIPTION:

These are a summary of receipts and disbursements by account and fund. May also include documentation from subsidiary ledgers to general ledger and accounting adjustments in the form of general entries.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 29273 1
TITLE: General plan
DATES: 2009-
ARRANGEMENT: none
DESCRIPTION:

These are comprehensive plans for municipal development adopted by the city commission. "Each municipality shall prepare and adopt a comprehensive, long-range general plan for present and future needs of the municipality; and growth and development of all or any part of the land within the municipality" (Utah Code 10-9a-401(1) (2005)). "The planning commission shall make and recommend to the [city commission] a proposed general plan for the area within the municipality" (Utah Code 10-9a-403(1)(b) (2012)). The plans serve as a guide for decision-making on rezoning and other planning proposals and as the goals and policies of municipalities attempting to guide land use in local jurisdictions. The plans include "planning commission's recommendations for the development of the territory covered by the plan, and may include, among other things: (a) a land use element; (b) a transportation and circulation element; (c) an environmental element; (d) a public service and facilities element; (e) a rehabilitation, redevelopment, and conservation element; (f) an economic element; (g) recommendations for implementing the plan, including the use of zoning ordinances, subdivision ordinances, capital improvement plans, and other appropriate actions; and any other elements that the municipality c a rehabilitation, redevelopment, and conservation element; (f) an economic element; (g) recommendations for implementing the plan, including the use of zoning ordinances, subdivision ordinances, capital improvement plans, and other appropriate actions; and any other elements that the municipality considers appropriate" (Utah Code 10-91-403 (3) (2012)). The plan may also include maps, plats, and charts.

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

AGENCY: Fillmore (Utah)

SERIES: 29273
TITLE: General plan

(continued)

FORMAT MANAGEMENT:

APPRAISAL:

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

AGENCY: Fillmore (Utah)

SERIES: 12048 1
TITLE: Mechanical system installation permit files
DATES: 1992-
ARRANGEMENT: Numerical by application number
DESCRIPTION:

These records are kept to verify that state mechanical code requirements are meet, and all installation are inspected and recorded. This file includes application number, name of applicant, address and phone number of applicant, job site, type or purpose of installation, contractor, approved by and date, inspection report, permit number assigned, date and signature of city recorder.

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

APPRAISAL:

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

This disposition is based on agencies need.

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12073 3
TITLE: Ordinances
DATES: 1852-
ARRANGEMENT: Generally chronological by date of adoption.
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:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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Paper: Retain in Office permanently.

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

APPRAISAL:

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

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

AGENCY: Fillmore (Utah)

SERIES: 12073
TITLE: Ordinances

(continued)

PRIMARY DESIGNATION:
Public

AGENCY: Fillmore (Utah)

SERIES: 12077 3
TITLE: Personnel files
DATES: undated
ARRANGEMENT: Alphabetical by last name
DESCRIPTION:

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

RETENTION:

Retain for 65 year(s) or until separation

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 08-29-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 65 years after date of employment or until 3 years after retirement or death and then destroy.

APPRAISAL:

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

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 DESIGNATION:

Private UCA 63G-2-302

AGENCY: Fillmore (Utah)

SERIES: 12077
TITLE: Personnel files

(continued)

SECONDARY DESIGNATION(S):

Public. UCA 63G-2-301

AGENCY: Fillmore (Utah)

SERIES: 12076 3
TITLE: Policies and procedures
DATES: undated
ARRANGEMENT: Chronological
DESCRIPTION:

These are manuals which indicate the responsibilities and guidelines on administrative policies, operational procedures, and rules and regulations.

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 02-26-2020

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12084 3
TITLE: Redevelopment board minutes
DATES: undated
ARRANGEMENT: Chronological
DESCRIPTION:

These are the official record of the proceedings of regularly scheduled, special and emergency board 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:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12075 3
TITLE: Resolutions
DATES: undated
ARRANGEMENT: Chronological 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).

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

APPRAISAL:

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

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 DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12047 3
TITLE: Sign permit files
DATES: 1988-
ARRANGEMENT: Numerical by application number
DESCRIPTION:

These file is used to regulate signs within the city limits. This file includes date received, date approved by city, date issued, payment receipt number, date of payment, permit number, applicant name, applicant address, applicant phone number, job site address, type of sign, sign dimension, type of construction, architect/engineer/contractor name and phone number, business address, city license number, state license number, applicant signature and date, approval by and date, building inspector comments and signature, and city council approval and date.

RETENTION:

Retain for 3 year(s) after expiration of permit or license

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Permit and licensing records, GRS-1724.

AUTHORIZED: 01-17-2020

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after expiration and then destroy.

APPRAISAL:

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

This disposition is based on the agencies need.

AGENCY: Fillmore (Utah)

SERIES: 12047
TITLE: Sign permit files

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12080 3
TITLE: Tentative budget records
DATES: undated
ARRANGEMENT: Chronological
DESCRIPTION:

On forms prepared by the state auditor, the budget officer prepares a tentative budget and files it with the governing body for the ensuing year for each fund for which a budget is required on or before the first regularly scheduled meeting in May (UCA 10-6-111).

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-17-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Fillmore (Utah)

SERIES: 12054 3
TITLE: Utility accounts receivable
DATES: undated
ARRANGEMENT: Numerical by account number
DESCRIPTION:

These files consist of copies prepared by municipalities to collect amounts owed by vendors, organizations, and citizens having accounts with municipal agencies (UCA 70A-2-725).

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public