

Retention and Classification Report

Agency: Department of Government Operations. Division of Purchasing and General Services (753)
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Records Officer: _____

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AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80977

3

TITLE: Active vendor bidder registration application

DATES: 1984-

ARRANGEMENT: Alphabetical by vendor name

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

The vendor application is the source document that Purchasing uses to input information about vendors into the Automated Information Mailing System (AIMS) database. Each vendor submits an application and a fee. A qualified applicant's information is input into a master bidder file. Whenever an appropriate opportunity to bid exists, a qualified vendor list is generated by the database, and eligible vendors are notified. Application information includes the vendor's name, mailing addresses, type of business, whether it is owned by a woman or minority, federal tax I.D. number, number of Utah employees, total number of employees, number of years in business, where incorporated, signatures of persons authorized to bid and make contracts, and commodities codes.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1999

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after vendor no longer has active status and then destroy.

APPRAISAL:

These records have administrative value(s).
This retention is based on the administrative need of the agency.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80977

TITLE: Active vendor bidder registration application

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Protected. UCA 63G-2-305 (2),(6) (2008). Federal Tax I.D.#

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 27038

3

TITLE: Activity reports

DATES: 2008-

ARRANGEMENT: Chronological by date.

DESCRIPTION:

This series contains weekly activity reports that track the productivity of division employees. These include key developments; key issues to address in the upcoming week; pending decisions from the Executive Director's Office; personnel issues, litigation issues; and notes on employee participation in projects, conferences, trainings, etc.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Employee and program productivity records, GRS-1698.

AUTHORIZED: 12-18-2018

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 1 year or until administrative need ends, whichever is first, and then delete.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Protected UCA 63G-2-305 (16), (25)

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16584

3

TITLE: Administrative correspondence

DATES: 1980-

ARRANGEMENT: Alphanumerical by subject or control number

DESCRIPTION:

These files document different types of communication concerning the primary mission and internal administration of the Purchasing Division. The division responsibility is to provide control over bids, bid approvals, and prescribe the methods for offering bids on state-wide contracts and other purchases. Other correspondence, accumulated by the division, relate to the housekeeping activities of the office. Includes memos and letters to and from vendors, agencies, and other states.

RETENTION:

Permanent. Retain for 4 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 29901

3

TITLE: Agency contracts

DATES: 1986-

ARRANGEMENT:

DESCRIPTION:

These records are contracts specific to one agency.

RETENTION:

Retain for 7 year(s) after final action

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years or until final action and then transfer to State Records Center. Retain in State Records Center for 7 years and then destroy.

Computer data files: Retain in Office for 7 years after final action and then delete.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81000

3

TITLE: Annual reports

DATES: undated

ARRANGEMENT: Chronological.

TOTAL VOLUME: 1.00 cubic foot.

DESCRIPTION:

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Publications, GRS-1678.

AUTHORIZED: 10-30-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 3 years and then transfer to State Archives with authority to weed.

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

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

APPRAISAL:

These records have administrative, and/or historical value(s). This disposition is based on the use of these records as historical and administrative documentation of the division's achievements and activities.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81000

TITLE: Annual reports

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16585

3

TITLE: Appeals and exhibits for administrative hearings of procurement

DATES: 1981-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These are records of the appeals made to the Procurement Board with any substantiating evidence produced at the hearing. The final results of the board's decisions are also kept in these files. Includes appeals, responses to the appeals, exhibits, and the board's decisions.

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 3 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). The appeals, the response to appeals, and the board decisions have evidential value and should be retained. Previous decision: RDR 02/02/85: 1 year/public.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16585

TITLE: Appeals and exhibits for administrative hearings of procurement

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 29903

3

TITLE: Audit records

DATES: 2003-

ARRANGEMENT:

DESCRIPTION:

These records are financial audits of state cooperative contracts executed by the Division of Purchasing and of Limited Purchasing Delegations.

RETENTION:

Permanent. Retain for 10 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Audit records, GRS-1727.

AUTHORIZED: 10-23-2019

FORMAT MANAGEMENT:

Paper: Retain in Office until administrative value has been met and then transfer to State Records Center. Retain in State Records Center for 10 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80990

3

TITLE: Bidder list master file

DATES: 1986-

ARRANGEMENT: none

DESCRIPTION:

This file supports the Bidder Master by indicating what commodities and services a bidder has been asked to quote on, what they responded on, and how many bids were awarded to a particular vendor/bidder. The file records procurement action statistics for the current and prior fiscal years to assist buyers with utilization and management of the information. It is also used to determine which vendors are eligible to bid on specific requests for quotations. Includes bidder reference number, reference notes, status of bidder, status date, most recent Request for Quotation (RFQ) date, all current year's RFQ's, prior year's RFQ's, most recent no-response date, and current year's no-response date. This is a master file of automated data system, file key: AIMS.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Approved vendor list, GRS-1975.

AUTHORIZED: 04-03-2018

FORMAT MANAGEMENT:

Computer magnetic storage media: Retain in Office for 1 year and then erase.

APPRAISAL:

These records have administrative value(s).
This information has administrative uses only.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80990

TITLE: Bidder list master file

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80989

3

TITLE: Bidder master file

DATES: 1986-

ARRANGEMENT: none

DESCRIPTION:

This is the primary file for supplying data for a bid request package. This tracks all vendors approved by the Division of Purchasing as eligible for participation within the state procurement system. The vendor application is the source document for this file. Includes bidder reference number, vendor's name, minority ownership code, women/minority certification, federal identification prefix, number of years in business, number of Utah employees, number of employees, location code, description of location, type of business, woman ownership code, application date, and current status of eligibility. This is a master file of automated data system, file key: AIMS.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Approved vendor list, GRS-1975.

AUTHORIZED: 04-03-2018

FORMAT MANAGEMENT:

Computer magnetic storage media: Retain in Office for 1 year and then erase.

APPRAISAL:

These records have administrative value(s).
This information has administrative uses only.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80989

TITLE: Bidder master file

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81002

3

TITLE: Budget estimates files

DATES: 1990-

ARRANGEMENT: none

DESCRIPTION:

Copies of budget estimates and justification prepared or consolidated in formally organized budget offices. Included are appropriation language sheets, narrative statements, workload/expansion plans and related schedules and data.

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Audited financial statements, GRS-1857.

AUTHORIZED: 12-03-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 3 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
Utah General Schedule 5 Item 2.

PRIMARY DESIGNATION:

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

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81002

TITLE: Budget estimates files

(continued)

SECONDARY DESIGNATION(S):

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

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81007

3

TITLE: Budget work program files

DATES: 1990-

ARRANGEMENT: none

DESCRIPTION:

Copies of budget estimates and justification prepared or consolidated in formally organized budget offices. Included are appropriation language sheets, narrative statements, workload/expansion plans and related schedules and data.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Budget records, GRS-1856.

AUTHORIZED: 12-17-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years 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).

PRIMARY DESIGNATION:

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

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81007

TITLE: Budget work program files

(continued)

SECONDARY DESIGNATION(S):

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

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81010

3

TITLE: Deposits to the Treasurer

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

Cash receipt transaction forms accompanying agency deposits to the State Treasurer's Office.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Cash receipt transaction form (fi-33), GRS-1806.

AUTHORIZED: 07-01-1990

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative, and/or fiscal value(s).
Utah General Schedule 6 Item 8.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 85065

3

TITLE: Executive correspondence

DATES: 1984-

ARRANGEMENT: Chronological

DESCRIPTION:

Business-related correspondence which provide unique information about agency functions, policies, procedures, or programs. These records document material discussions and decisions made regarding all agency interests, and may originate on paper, electronic mail, or other media. This correspondence is filed separately from program case files, and project files.

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-12-2018

FORMAT MANAGEMENT:

Paper: Retain in Office until administrative use ends and then transfer to State Records Center. Retain in State Records Center for 5 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have historical value(s).

Correspondence has research value because it documents agency history and functions.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 85065

TITLE: Executive correspondence

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81011

1

TITLE: Expenditure adjustments

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

Adjustments created by agency accounting officers and sent to the Division of Finance to correct errors on warrant requests and interdepartmental transfers.

RETENTION:

Retain for 3 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 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).
Utah General Schedule 6 Item 7.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81012

1

TITLE: Freight files

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

Records relating to freight, consisting of export certificates, transit certificates, demurrage card, record books, shipping documents pertinent to freight classification, memorandum copies of government or commercial bills of lading, shortage and demurrage reports, and all supporting documents, including records relating to the shipment of household goods.

RETENTION:

Retain for 3 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 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 value(s).
Utah General Schedule 9 Item 1.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 5567

3

TITLE: Governor's mansion inventory

DATES: 1957-

ARRANGEMENT: Alphanumerical

DESCRIPTION:

These records are an inventory of the governor's mansion.

RETENTION:

Permanent. Retain until administrative need ends

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have historical value(s).

The inventory documents the history of the governor's mansion and the functions of the staff.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81013

3

TITLE: Interdepartmental transfers

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

Records that document receipt of cash or transfers between state agencies in the state accounting system, and other relevant information. Includes cash receipts (CR), inter-agency transactions (IAT), and revenue (IN) transactions.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 7 years and then destroy.

APPRAISAL:

These records have administrative value(s).
Utah General Schedule 6 Item 5.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81016

1

TITLE: Lost or damaged shipments records

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

Schedules of valuables shipped, correspondence, memoranda, reports and other related records.

RETENTION:

Retain for 3 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 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 value(s).
Utah General Schedule 9 Item 2.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80986

3

TITLE: Minute books

DATES: 1965-

ARRANGEMENT: Chronological

DESCRIPTION:

Minutes of open and closed committee and board meetings as required by UCA 52-4-203 (2014), et seq. "Written minutes shall be kept of all open meetings" UCA 52-4-203 (2013). May include agenda, meeting minutes, transcripts, and other supporting documentation.

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 Open meeting minutes & supplementary materials, GRS-1709.

AUTHORIZED: 10-28-2020

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s).
These records document one of the primary functions of this agency.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81017

1

TITLE: Office equipment inventory

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

These records are used to track and control capital outlay such as office equipment (chairs, typewriters, etc.) and other fixed assets including tools, machinery, and other large equipment.

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 after last inventory and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
Utah General Schedule 3 Item 10.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16589

3

TITLE: Policy and procedures

DATES: 1985-

ARRANGEMENT: Alphabetical by subject.

DESCRIPTION:

These are policies and procedures documenting the purchasing procedures all state agencies must follow when procuring materials or services. Includes information on how to buy from other state agencies, how to buy from state contracts, how to make purchases for \$1000 or more, how to get approvals for emergency purchases, and how to make sole source purchases.

RETENTION:

Permanent. Retain for 4 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 2 years after update and then transfer to State Records Center. Retain in State Records Center for 2 years and then transfer to State Archives with authority to weed.

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

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

APPRAISAL:

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

These records have historical and evidential value.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16589

TITLE: Policy and procedures

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 29902

3

TITLE: Protest records

DATES: 2008-

ARRANGEMENT:

DESCRIPTION:

These records document protests filed with the Chief Procurement Officer concerning solicitations completed by the Division of Purchasing, as described in Utah Code 63G-6a-16 (2016) and Utah Administrative Code R33-16 (2019).

RETENTION:

Retain for 6 year(s) after resolution of issue

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Request for proposal records, GRS-1991.

AUTHORIZED: 12-21-2018

FORMAT MANAGEMENT:

Paper: Retain in Office until resolution of issue and then transfer to State Records Center. Retain in State Records Center for 7 years and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 23309

3

TITLE: Publications

DATES: 1970-

ARRANGEMENT: Chronological.

DESCRIPTION:

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

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 Publications, GRS-1678.

AUTHORIZED: 10-30-2018

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

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

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

APPRAISAL:

These records have historical value(s).

Publications which document agency history and functions have ongoing research value.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 23309

TITLE: Publications

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16592

3

TITLE: Purchase orders

DATES: 1974-

ARRANGEMENT: Numerical by control number.

DESCRIPTION:

These orders are used to document a purchase transaction for expenditures over \$50 and to notify an agency of purchase approval.

RETENTION:

Retain for 12 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after close of fiscal year and then transfer to State Records Center. Retain in State Records Center for 11 years and then destroy.

Computer data files: Retain in Office for 12 years and then delete.

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). These records are connected to the contract process captured in retention schedule #16593: Purchasing contracts, and are therefore following GRS-1731: Contract and lease records. All contracts cover a period of 5 years, so 7 years after the expiration of the contractual agreement equals a 12-year retention.

RETENTION JUSTIFICATION:

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16592

TITLE: Purchase orders

(continued)

Previous retention was based upon Utah Procurement Code, Utah Code 63G-6a-2002(3)(2016):
(3) A procurement unit shall keep, and make available to the public, upon request, written records of procurements for which an expenditure of \$50 or more is made, for the longer of: (a) six years; (b) the time otherwise required by law; or (c) the time period provided by rule made by the applicable rulemaking authority. -RMW

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 01/2021.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16593

3

TITLE: Purchasing contracts

DATES: 1980-

ARRANGEMENT: Numerical by contract number.

DESCRIPTION:

These records are statewide contracts made with vendors in order to get the most favorable prices for materials or services. These contracts give all agencies the authorization to make purchases from a specific vendor. Agencies submit warrant requests with appropriate invoices in order to buy materials under the terms of the contract. Records may include bid tabulation, copy of approved bid, contract information sheet, and correspondence with the vendor.

RETENTION:

Retain for 7 year(s) after expiration of contractual agreement

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office until digitized and then transfer to State Records Center. Retain in State Records Center for 12 years and then destroy.

Computer data files: Retain in Office for 7 years and then delete.

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). Appraisal is based upon Utah Procurement Code, Utah Code 63G-6a-2002(3)(2016): (3) A procurement unit shall keep, and make available to the public, upon request, written records of procurements for which an expenditure of \$50 or more is made, for the longer of: (a) six years; (b) the time otherwise required by

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16593

TITLE: Purchasing contracts

(continued)

law; or (c) the time period provided by rule made by the applicable rulemaking authority.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81022

3

TITLE: Records transfer sheets

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

See General Retention Schedule 1988:1:16.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 08/1988

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

Utah General Schedule 1988:1:16.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 29904

3

TITLE: Sole source solicitation records

DATES: 2011-

ARRANGEMENT: Numerical by control number.

DESCRIPTION:

These records are for solicitations of procurement items for which there is only one source, as described in Utah Procurement Code, Utah Code 63G-6a-802(1) (2016).

RETENTION:

Retain for 12 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 11 years and then destroy.

Computer data files: Retain in Office for 12 years and then delete.

APPRAISAL:

These records have administrative, and/or fiscal value(s). These records are connected to the contract process captured in retention schedule #16593: Purchasing contracts, and are therefore following GRS-1731: Contract and lease records. All contracts cover a period of 5 years, so 7 years after the expiration of the contractual agreement equals a 12-year retention.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 29904

TITLE: Sole source solicitation records

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 01/2021.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16591

3

TITLE: Solicitation files

DATES: 1977-

ARRANGEMENT: Alphanumerical by purchasing agent's initials and a control number.

ANNUAL ACCUMULATION: 60.00 cubic feet.

DESCRIPTION:

Each bid file is a unique compilation of documents that begins with a stated need for a good or service. Purchasing documents in the bid file may include the following items: Statewide Contract Coversheet, Master Bidder List, Requisition (RX), Request for Proposal (RFP), Request for Quotation (RFQ), Invitation to Bid (ITB), Statement of Interest (SOI), Statement of Qualifications (SOQ), Bidder's Response, Offerer's Response, and purchase orders. At the request of a state agency or upon determination of need by the Division of Purchasing, the bid process begins. Purchasing creates a Master Bidder List from their database and all eligible bidders are notified. When a bid closes, the Division of Purchasing creates a tabulation of bid proposals and forwards this information to the agency for their recommendation. When the agency returns the recommendation, a vendor is selected and notified, and a contractual agreement is signed. Purchasing also notifies all non-successful bidders and maintains the entire group of bid proposals in the bid file.

Thereafter, any state agency may purchase items from the vendor according to the terms and conditions outlined in the contract.

RETENTION:

Retain for 12 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

AUTHORIZED: 07-30-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after close of fiscal year and then transfer to State Records Center. Retain in State Records

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16591

TITLE: Solicitation files

(continued)

Center for 11 years and then destroy.

Computer data files: Retain in Office for 12 years and then delete.

APPRAISAL:

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

These records are connected to the contract process captured in retention schedule #16593: Purchasing contracts, and are therefore following GRS-1731: Contract and lease records. All contracts cover a period of 5 years, so 7 years after the expiration of the contractual agreement equals a 12-year retention.

RETENTION JUSTIFICATION:

These records are connected to the contract process captured in retention schedule #16593: Purchasing contracts, and are therefore following GRS-1731: Contract and lease records. All contracts cover a period of 5 years, so 7 years after the expiration of the contractual agreement equals a 12-year retention. -RMW

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Protected. Utah Code 63G-2-305(2) and (6)(2018)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 01/2021.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81023

3

TITLE: Surplus Property case files

DATES: 1990-

ARRANGEMENT: none

DESCRIPTION:

Case files on sales of surplus personal property (including those transactions deviating from standard procedures), comprising of invitations, bid acceptances, lists of materials, evidence of sales, and related correspondence.

RETENTION:

Retain for 6 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Surplus property records, GRS-2307.

AUTHORIZED: 08-01-1999

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

APPRAISAL:

These records have administrative value(s).
Utah General Schedule 4 Item 2.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81023

TITLE: Surplus Property case files

(continued)

SECONDARY DESIGNATION(S):

Private. Name, phone number, and address of customer

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80993

1

TITLE: System guide

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

User and operational documentation describing how an application system operates from a functional user and data processing point of view, including records documenting data entry, manipulation, output and retrieval, records necessary for using the system, including user guides, system or sub-system definitions, system flowcharts, program descriptions and documentation, job control or work flow records, system specifications, and input and output specifications. This documentation only includes that of databases whose information is not considered permanent or otherwise significant.

RETENTION:

Retain until superseded

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 until superseded or until deletion of database and then destroy.

APPRAISAL:

These records have administrative value(s).

The systems guide has to be kept for the same length of time as the master files so that the data in the guide can be used to reference the on-line files.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 80993

TITLE: System guide

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81024

3

TITLE: Travel reimbursement files

DATES: 1990-

ARRANGEMENT: none

DESCRIPTION:

See General Retention Schedule 1988:6:40.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 08/1988

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 value(s).
Utah General Schedule 9 Item 4.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81025

3

TITLE: Travel requests

DATES: 1990-

ARRANGEMENT: none

DESCRIPTION:

These records document payments made to state employees and agencies for the purpose of reimbursing travel, transportation, equipment, service, training, and other reimbursable costs. Records include correspondence, forms, travel reservations, travel authorizations, per diem vouchers, transportation requests, hotel reservations, invoices, itemized expenses, and other supporting records used to validate reimbursable expenses.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Reimbursement files, GRS-1833.

AUTHORIZED: 01-11-2019

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 value(s).
Utah General Schedule 9 Item 3.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81025

TITLE: Travel requests

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 7287

3

TITLE: Vendor exhibit records

DATES: i 1981-

ARRANGEMENT: None

DESCRIPTION:

These records include legal exhibits introduced to the Purchasing Board of Appeals. These charts and graphs show sales history and price ranges as presented by private vendors.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 02/1985

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs of the agency.

PRIMARY DESIGNATION:

Public

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 16590

3

TITLE: Vendor's guide to purchasing

DATES: 1984-

ARRANGEMENT: Chronological

DESCRIPTION:

These manuals provide guidelines on how to submit bids to state agencies or purchasing; how to do business with the Division of Purchasing; and, how bids will be evaluated. Includes procedures on how to make bids and a table of commodity codes.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 03/1987

FORMAT MANAGEMENT:

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

APPRAISAL:

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

These records have historical and evidential value.

AGENCY: Department of Government Operations. Division of Purchasing and General Services

SERIES: 81026

1

TITLE: Warrant requests

DATES: undated

ARRANGEMENT: none

DESCRIPTION:

Requests from state agencies to the Division of Finance to pay vendors for supplies and/or services the vendors have provided to the agencies.

RETENTION:

Retain for 7 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 7 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s).
Utah General Schedule 6 Item 1.

PRIMARY DESIGNATION:

Public