

Retention and Classification Report

Agency: Utah State Retirement Office (832)

540 East 200 South
Salt Lake City, UT 84102
801-366-7700

Records Officer: _____

03011	Annual settlement reports
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84126	Employees index cards
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AGENCY: Utah State Retirement Office

SERIES: 3011

3

TITLE: Annual settlement reports

DATES: 1937-

ARRANGEMENT: Chronological

DESCRIPTION:

This series contains summary settlement reports for the State Retirement Office with information pertaining to the contributory, noncontributory, public safety, firefighter, and judges' retirement systems. It also has information regarding governors' and legislators' pension plans, and fiscal and financial operations. Information includes names, previous balances, balances forward, salaries, member contributions, vested contributions, interest earned, redeposits, differences, and current balances.

RETENTION:

Retain for 80 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in State Records Center for 80 years and then destroy.

Microfiche master: Retain in Archives for 80 years and then destroy.

Microfiche duplicate: Retain in Archives for 80 years and then destroy.

Microfilm master: Retain in Archives for 80 years and then destroy.

Microfilm duplicate: Retain in Archives for 80 years and then destroy.

AGENCY: Utah State Retirement Office

SERIES: 3011

TITLE: Annual settlement reports

(continued)

APPRAISAL:

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

Disposition is based on the need to document retirement benefits for individual state employees. Program is mandated by Utah Code Annotated Title 49.

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

Public

AGENCY: Utah State Retirement Office

SERIES: 84610

3

TITLE: Deceased members records

DATES: 1937-1966.

ARRANGEMENT: Alphabetical

TOTAL VOLUME: 8.00 cubic feet.

DESCRIPTION:

This is a record used to verify deceased members of the retirement system. Includes enrollment, refund, and beneficiary forms, and ledgers. This record is obsolete and is no longer used.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 09/1989

FORMAT MANAGEMENT:

Paper: Retain in Office for 20 years and then destroy.

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

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Private

AGENCY: Utah State Retirement Office

SERIES: 84126

3

TITLE: Employees index cards

DATES: 1937-

ARRANGEMENT: alphabetical by name

ANNUAL ACCUMULATION: 25.00 cubic feet.

DESCRIPTION:

This is a file that provides a summary of an individual's history on the system. Also provides information to calculate redeposit amounts after returning to public employment, and determine eligibility and benefits. Includes employment history, termination date, refund amount, refund date, address, date of birth, occupation, and Social Security number.

RETENTION:

Retain for 60 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 09/1989

FORMAT MANAGEMENT:

Paper: Retain in Office for 15 years and then destroy provided microfilmed.

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

Microfilm duplicate: Retain in Office for 45 years or until administrative use ends and then destroy.

APPRAISAL:

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

AGENCY: Utah State Retirement Office

SERIES: 84126

TITLE: Employees index cards

(continued)

PRIMARY DESIGNATION:

Private

AGENCY: Utah State Retirement Office

SERIES: 3012

1

TITLE: Financial reports and records

DATES: 1941-1986.

ARRANGEMENT: Alphanumerical

DESCRIPTION:

This series includes ledgers, expenditure vouchers, cancelled checks, receipts and disbursements, trial balance journals, and investment fund records.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

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

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

APPRAISAL:

These records have fiscal value(s).

AGENCY: Utah State Retirement Office

SERIES: 19285

3

TITLE: Investment fund records

DATES: 1963-1983.

ARRANGEMENT: Chronological

DESCRIPTION:

Investment fund records are reports on the investment, yield and distribution of monies of a consolidation of participating equities (school and public divisions of the Utah State Retirement System from the Public Safety Retirement System, the Judges' Retirement System, and the Firemen's Pension Act.)

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

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

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

APPRAISAL:

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

These records document performance and distribution of investments for the Utah State Retirement System for several agencies over a 20 year period and, as such, are of historical and research value.

PRIMARY DESIGNATION:

Public

AGENCY: Utah State Retirement Office

SERIES: 18686

3

TITLE: Member's annual statements

DATES: 1983.

ARRANGEMENT: Numerical by social security number.

DESCRIPTION:

The Member's Annual Statment shows the amounts that have been credited to a member's account that year, listed under the member's name. Shows contributions made, interest earned, balance, and estimated payments at retirement.

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:

Computer output microfiche master: Retain in State Records Center for 10 years and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

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

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 12/2017.

AGENCY: Utah State Retirement Office

SERIES: 18241

1

TITLE: Mortgage/real estate records

DATES: 1963-

ARRANGEMENT: Alphabetical/chronological or numerical

DESCRIPTION:

These records include documentation of sold properties, proposed acquisitions, company profiles, submittals, property reports, general correspondence files.

RETENTION:

Retain for 45 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 6 years after being microfilmed and then destroy provided microfilm has passed inspection.

Microfilm master: Retain in Archives for 45 years and then destroy.

Microfilm duplicate: Retain in Office for 45 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private UCA 63G-2-302(2008)

AGENCY: Utah State Retirement Office

SERIES: 3010

3

TITLE: Publications

DATES: 1941-

ARRANGEMENT: Chronological

DESCRIPTION:

This series contains documents created by the agency, including pamphlets, reports, leaflets, file manuals, and other published or processed documents. These records include information on administration, legal matters, fiscal and financial operations, retirement, and all other activities of the State Retirement Office. This series consists primarily of isolated publications not part of a more specific series.

RETENTION:

Permanent. Retain until administrative need ends

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10-30-2018

FORMAT MANAGEMENT:

Paper: 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: Utah State Retirement Office

SERIES: 3010

TITLE: Publications

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Utah State Retirement Office

SERIES: 6622

3

TITLE: Retirement membership files

DATES: 1967-

ARRANGEMENT: Numerical by Social Security number.

ANNUAL ACCUMULATION: 300.00 cubic feet.

DESCRIPTION:

These records contain all transactions between the Utah Retirement Office and individuals in the Utah Retirement System. Records are used for reference, and document the status of members' accounts. Information includes membership forms, enrollment forms, applications for refunds, requests for redeposit information, and withdrawal applications for the 401(k) plan.

RETENTION:

Retain for 80 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 03/1990

FORMAT MANAGEMENT:

Paper: Retain in State Records Center for 80 years and then destroy.

Microfilm master: Retain in State Records Center for 80 years and then destroy.

Microfilm duplicate: For records beginning in 1967 through 1999. Retain in State Records Center for 80 years and then destroy.

APPRAISAL:

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

These records have administrative and fiscal value as they document employee participation in the state retirement program.

AGENCY: Utah State Retirement Office

SERIES: 6622

TITLE: Retirement membership files

(continued)

PRIMARY DESIGNATION:

Private

UCA 63G-2-302 (1)(a) and (f) (2009)

AGENCY: Utah State Retirement Office

SERIES: 3013

3

TITLE: State employees' life insurance cards

DATES: 1965-1970.

ARRANGEMENT: Alphanumerical

DESCRIPTION:

These are records of life insurance enrollment for state employees. Information on the cards includes employee's name and personal information as well as beneficiary and payroll deduction information.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

AGENCY: Utah State Retirement Office

SERIES: 9236

3

TITLE: Unit reports

DATES: 1937-

ARRANGEMENT: Chronological/numerical

ANNUAL ACCUMULATION: 40.00 cubic feet.

DESCRIPTION:

This is a report to verify distribution of funds to an individual's account, and to document service credit earned, and to verify termination date of employee. Includes name, Social Security number, wage earned, working hours, and amount contributed to the employee's account.

RETENTION:

Retain for 45 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 09/1989

FORMAT MANAGEMENT:

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

Microfilm master: Retain in State Records Center for 45 years and then destroy.

Microfilm duplicate: Retain in Office for 45 years and then destroy.

APPRAISAL:

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

These records have administrative and fiscal value as they are used to document funds placed in an individuals' account.

AGENCY: Utah State Retirement Office

SERIES: 9236

TITLE: Unit reports

(continued)

PRIMARY DESIGNATION:

Private

UCA 63G-2-302 (1)(a) and (f) (2009)

AGENCY: Utah State Retirement Office

SERIES: 3014

3

TITLE: University of Utah insurance cards

DATES: 1966-1974.

ARRANGEMENT: Alphanumerical

DESCRIPTION:

These are records of life insurance enrollment for university employees. Information on the cards includes employee's name and personal information as well as beneficiary and payroll deduction information.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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