Retention and Classification Report

Agency: Department of Government Operations. Division of Purchasing and General Services. Surplus Property (1107)
447 West 13800 South
Draper, UT 84020
801-538-3014

Records Officer: _____

27012	Activity reports
84109	Closed item history report
19807	Compliance records
16596	Customer case files
19810	Eligibility files
23699	Financial reports
19809	Property distribution records
02404	Publications
16594	State and federal surplus eligibility case files
16595	State and local agencies surplus property case files
19808	Surplus personal property transfer order records
16597	Surplus property destruction files
16598	Surplus property sales invoices

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

SERIES: 27012 3
TITLE: Activity reports
DATES: 2008-
ARRANGEMENT: Chronological by date.
DESCRIPTION:

This series contains reports documenting work productivity of division employees. Includes key developments, pending decisions, personnel issues, any patron or inter-agency complaints, upcoming events, any recent or pending major purchases, and any key measurements that better illustrate employee productivity within the department.

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:

Paper: Retain in Office for 1 year or until until administrative need ends and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Protected UCA 63-2-305 (25)

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

SERIES: 84109 1

TITLE: Closed item history report

DATES: 1985-

ARRANGEMENT: Numerical by SP-1 number

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This is a computer-generated report which tracks all property coming in and going out of Surplus Property. It is used for inventory control and audits. The report includes item description, donor, reference for payback data, and dates of transactions. Records which document the sale, disposal, or surplus of personal property These files may comprise 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 proposed and has not yet been approved.

FORMAT MANAGEMENT:

Paper: Retain in Office for 6 years and then destroy.

Computer magnetic storage media: Retain in Office for 2 years and then erase.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

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

SERIES: 19807 3
TITLE: Compliance records
DATES: 1987-
ARRANGEMENT: Alphabetical by customer surname, thereunder chronological by year.
DESCRIPTION:

The agency creates these "Put into use forms" in order to specify the date the property is put into use so that the 18 months of time can be set in motion. Cannabilization forms authorize the property to be altered and the time also monitored. Information includes customer number, name, and address; designated representative; description of property; serial number; product number (123 number); invoice number; acquisition cost; and service charge; the date the property is placed in use; location of item; and item's primary use; date signed and signature of the designated representative. The Cannibalization form also contains the above in addition to the added approval of the agency manager.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 07/1998

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

Computer data files: Retain in Office until administrative need ends and then delete.

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

SERIES: 19807

TITLE: Compliance records

(continued)

APPRAISAL:

These records have legal value(s).

This disposition is based on the administrative needs expressed by the agency and general services administration guidelines.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

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

SERIES: 16596 3
TITLE: Customer case files
DATES: 1981-
ARRANGEMENT: Numerical by customer number
DESCRIPTION:

These records are the hard copy duplicate of information found on the accounts receivable file in the division's computer. They are either input or output from the system. They document the transactions between the customers and the division. They are also used to calculate and bill all customers for money received and money owed for that customer's account. Includes credit and debit memos, return to stock forms, invoices, and account statements.

RETENTION:

Retain for 3 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 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, fiscal, and/or legal value(s).

These records are necessary for audit reveiw. Previous decision: RDR 68-45: 5 years/public.

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

SERIES: 16596

TITLE: Customer case files

(continued)

PRIMARY DESIGNATION:

Public

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

SERIES: 19810 3

TITLE: Eligibility files

DATES: 1987-

ARRANGEMENT: Numerical by county code and computer number, thereunder chronological by year.

ANNUAL ACCUMULATION: 5.00 cubic feet.

DESCRIPTION:

The purpose of the eligibility files is to establish whether an organization meets the requirements set by the Government Services Administration (GSA) to be able to acquire federal property for its use. The information is used to verify customer authorized signatures, addresses, and designated representative in charge of tracking the federal property an agency receives for its use. The file is updated every two years. Information includes agency name, address, phone number, fax number, public agency or non-profit, information pertinent to the agency, budget, description, and population served. Also the name and signature of designated representative and all the authorized signers and the signed terms and condition sheets.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 07/1998

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

Computer data files: Retain in Office until administrative need ends and then delete.

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

SERIES: 19810

TITLE: Eligibility files

(continued)

APPRAISAL:

These records have administrative value(s).

This disposition is based on the administrative needs of the agency.

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

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

SERIES: 23699 3

TITLE: Financial reports

DATES: 1995-

ARRANGEMENT: Chronological by month

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Reports of accounting information contained in the state accounting system, including budget, grant, payroll, revenue expense, and accounting reports and bank reconciliations.

RETENTION:

Retain for 7 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 3 years and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

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

SERIES: 19809 3

TITLE: Property distribution records

DATES: 1987-

ARRANGEMENT: Numerical by property distribution number, thereunder chronological by year.

ANNUAL ACCUMULATION: 3.50 cubic feet.

DESCRIPTION:

The property distribution document is a computer generated and numbered invoice of the property donated to an agency. The invoice is used to track all property donated to a specific agency. Information includes customer number, signer of the invoice, invoice number, product number (the 123 or transfer document number), quantity donated, and intended use. Invoice also states whether it is a compliance item or not.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 07/1998

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

Computer data files: Retain in Office until administrative need ends and then delete.

APPRAISAL:

These records have administrative value(s).

This disposition is based on the administrative needs of the agency.

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

SERIES: 19809

TITLE: Property distribution records

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

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

SERIES: 2404 3
TITLE: Publications
DATES: 1953-
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, surplus, property, and all other activities of the Division of Government Surplus. 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).

These records document the policies, activities, and function of the agency.

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

SERIES: 2404

TITLE: Publications

(continued)

PRIMARY DESIGNATION:

Public

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

SERIES: 16594 3
TITLE: State and federal surplus eligibility case files
DATES: 1981-
ARRANGEMENT: Alphabetical by name of applicant
DESCRIPTION:

These files document the eligibility and qualification of a customer's right to purchase state/federal surplus property. Includes application, a resolution and certification, a list of authorized agents for applicant, federal regulation compliance certification, and a statement of needs and resources.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 03/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 1 year and then destroy.

APPRAISAL:

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

This retention is based in part on the GSA's Records Maintenance and Disposition Handbook, OADP 1820.2. Previous decision: RDR 68-45: 5 years/public.

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

SERIES: 16594

TITLE: State and federal surplus eligibility case files

(continued)

PRIMARY DESIGNATION:

Public

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

SERIES: 16595 3

TITLE: State and local agencies surplus property case files

DATES: 1981-

ARRANGEMENT: Alphabetical by agency

DESCRIPTION:

When an agency decides it wants to surplus some damaged, excess, or outdated property, they must complete a declaration of surplus property form. Many times the declaration is completed before the equipment arrives so the declaration is considered pending. When the property arrives, it is then kept until sold or disposed of. When the disposition of the property is finally determined, a copy of the SP-1 is returned to the agency and the money collected for the sale is credited to their low organization or bank account. If the property is destroyed then an SP-3, Notification of Destruction, is sent to the agency. It includes location of the property in warehouse, description of the item, minimum acceptable price, the bid tabulation, the actual sales price, and the tape register of totals.

RETENTION:

Retain for 2 year(s) after disposition of asset

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Surplus property forms, GRS-1992.

AUTHORIZED: 04-01-2006

FORMAT MANAGEMENT:

Paper: Retain in State Records Center for 2 years after final disposition of property and then destroy.

APPRAISAL:

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

This retention is based in part on the GSA's Records Maintenance and Disposition Handbook, OADP 1820.2. Previous decision: RDR 68-45: 5 years.

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

SERIES: 16595

TITLE: State and local agencies surplus property case files

(continued)

PRIMARY DESIGNATION:

Public

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

SERIES: 19808 3

TITLE: Surplus personal property transfer order records

DATES: 1987-

ARRANGEMENT: Numerical by number of state, fiscal year, and computer number

ANNUAL ACCUMULATION: 3.50 cubic feet.

DESCRIPTION:

These documents initiate approval from the Government Services Administration (GSA) to allocate property to the Division of Government Surplus. The number assigned by the computer follows each piece of property from approval, receiving into inventory, to the donation of the property. Information includes serial number, national stock number, year, model, mileage, acquisition cost, and document origin number.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 07/1998

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

Computer data files: Retain in Office until administrative need ends and then delete.

APPRAISAL:

These records have administrative value(s).

This disposition is based on the administrative needs expressed by the agency.

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

SERIES: 19808

TITLE: Surplus personal property transfer order records

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

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

SERIES: 16597 3
TITLE: Surplus property destruction files
DATES: 1981-
ARRANGEMENT: Chronological
DESCRIPTION:

These records document the proper and legal disposal of state property. If an item of state property cannot be sold for various reasons, the Division of Surplus Property will declare the property nonsalvagaeble and prepare this document so that the item can be destroyed. Includes item name, description, original cost, date of purchase, quantity, total cost, authorization of agency property officer, a witness' signature, and method of destruction.

RETENTION:

Retain for 2 year(s) after disposition of asset

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 03/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years after final disposition of property and then destroy.

APPRAISAL:

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

This retention is based in part on the GSA's Records Maintenance and Disposition Handbook, OADP 1820.2. Previous decision: RDR 68-45: 5 years.

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

SERIES: 16598 3

TITLE: Surplus property sales invoices

DATES: 1985-

ARRANGEMENT: Chronological.

DESCRIPTION:

The records are used to document the sales transactions of any surplus property where cash is received. They are also used to update the SP-1's. Includes reference number, signature of receipt to whom the item was sold, description of what was sold, date, and amount.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 03/1987

FORMAT MANAGEMENT:

Paper: Retain in Office for 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).

These are necessary for audit review. Previous decision: RDR 68-45: 5 years.

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

SERIES: 16598

TITLE: Surplus property sales invoices

(continued)

PRIMARY DESIGNATION:

Public