

Retention and Classification Report

Agency: Department of Administrative Services. Division of Finance. Social Security Office (1247)
Utah Social Security Agency
2110 State Office Building
Salt Lake City, UT 84114
801-538-3020

Records Officer: _____

08489	*Annual report of wages and contributions by political subdiv
08491	*Annual summary of reporting entity's contributions and wages
25502	*Reporting manual
08493	*Social security quarterly reports

AGENCY: Department of Administrative Services. Division of Finance. Social Security Office

SERIES: 8489

3

TITLE: Annual report of wages and contributions by political subdivision

DATES: 1953-1986.

ARRANGEMENT: None

DESCRIPTION:

This is a report of social security contributions and wages for each reporting entity for each reporting period during the entire year. It is used to balance the state's record of reported wages and contributions with the reporting entity's annual summary. These documents include the reporting period, the date paid, reported wages, FICA taxes due, amount remitted, amount over/short, and interest on late payments due.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 08/1986

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 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).

This is currently being saved for audit purposes. Since this is a new method of reporting to the Social Security Administration, audits are really 3 1/2 to 4 years from being conducted. The agency supervisor currently believes that this cycle of audits may be reduced to two or three years. However, this is not certain, so the retention of five years has been set.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2015.

AGENCY: Department of Administrative Services. Division of Finance. Social Security Office

SERIES: 8491

3

TITLE: Annual summary of reporting entity's contributions and wages

DATES: 1953-1986.

ARRANGEMENT: None

DESCRIPTION:

This is the political subdivision's report sent through the state to the Social Security Administration in Baltimore. It is used by the state administrator to reconcile overpayments and underpayments to each reporting entity's account. As a result, adjustments are approved for each employer contributions. Includes the W-3 Report, Form 6560, and the Annual Recap of Employer's Contributions (the bottom portion of the DF 14).

RETENTION AND DISPOSITION AUTHORIZATION:

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PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2015.

AGENCY: Department of Administrative Services. Division of Finance. Social Security Office

SERIES: 25502

3

TITLE: Reporting manual

DATES: 1972-1996.

ARRANGEMENT: none

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 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.

APPRAISAL:

These records have historical value(s).
Publications document agency history and functions and have ongoing research value.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2015.

AGENCY: Department of Administrative Services. Division of Finance. Social Security Office

SERIES: 8493

3

TITLE: Social security quarterly reports

DATES: 1953-1981.

ARRANGEMENT: None

DESCRIPTION:

This is a quarterly report sent to the Social Security Administration in Baltimore. The original was sent to the federal government and the copy was retained by the state. It was phased out in 1981 in favor of the bi-monthly reporting process now in effect. These reports include the political subdivision's name, address, identification number, the date of the calendar year and the quarter covered, the number persons employed during the quarter, each employee and his social security number, the total wages paid, the FICA wages paid, and the total contributions paid by the employee and the employer.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 08/1986

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 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 legal value(s).

This appraisal is based on the retention established in USCA 42 and CFR 20-404-1201.

PRIMARY DESIGNATION:

Private Utah Code 63G-2-302

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2015.