

Retention and Classification Report

Agency: Davis County (Utah). County Controller (1454)

Davis Co. Administration Building
61 South Main Street, P.O. Box 618
Farmington, UT 84025

Records Officer: _____

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AGENCY: Davis County (Utah). County Controller

SERIES: 11633

3

TITLE: Abatement application files

DATES: 1993-

ARRANGEMENT: Chronological, thereunder alphabetical by surname

DESCRIPTION:

These records are used for granting exemption of property taxes for specific conditions. Information may include the application, parcels owned, the abatement amount, status, and supporting documentation.

RETENTION:

Permanent. Retain for 3 year(s)

DISPOSITION:

Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Tax abatement records, GRS-225.

AUTHORIZED: 12-04-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Archives.

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)

SECONDARY DESIGNATION(S):

Controlled

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 05/2020.

AGENCY: Davis County (Utah). County Controller

SERIES: 11635

1

TITLE: Abatement register

DATES: 1980-

ARRANGEMENT: Chronological, thereunder alphabetical by surname

DESCRIPTION:

This register lists the names of persons receiving tax exemptions because of disability, age, veteran status, or extreme hardship. The register also lists all parcels to which abatement is applied and the amount of abatement, and status (widow, orphan, veteran, indigent, blind or disabled).

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Retain until superseded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:

Computer data files: Retain in Office until superseded or updated and then delete.

Paper: Retain in Office until superseded or updated and then destroy.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11636

3

TITLE: Accounts payable

DATES: 1940-

ARRANGEMENT: Chronological

DESCRIPTION:

These records support the agency's function to perform all countywide accounting services. Records document debits owed by the county and are used to ensure proper payment of services rendered to the county. Information includes billing organization, amount due, and date of payment.

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:

Computer data files: Retain in Office for 4 years and then delete.

Paper: For records prior to and including 2018. Retain in Office for 4 years and then destroy.

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). Legal appraisal is based on Utah Code 70A-2-725(1998).

AGENCY: Davis County (Utah). County Controller

SERIES: 11636

TITLE: Accounts payable

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2020.

AGENCY: Davis County (Utah). County Controller

SERIES: 11637

1

TITLE: Accounts receivable

DATES: 1940-

ARRANGEMENT: Chronological

DESCRIPTION:

These records support the agency's function to perform all countywide accounting services. Records document credits owed to the county and are used to ensure proper receipt of services rendered by the county. Information includes person or organization billed, amount due, and receipt of payment.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 4 years and then delete.

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

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s).
Legal appraisal is based on Utah Code 70A-2-725(1998).

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2020.

AGENCY: Davis County (Utah). County Controller

SERIES: 11638

3

TITLE: Annual budget

DATES: 1900-

ARRANGEMENT: Chronological

DESCRIPTION:

The annual budget is approved and used to document the intended appropriation of funds for financial operations during the specified fiscal period. This is the final budget that is adopted by the governing body.

RETENTION:

Retain permanently

DISPOSITION:

May 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 permanently.

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

Computer data files: Retain in Office permanently.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 84732

3

TITLE: Annual Comprehensive Financial Report (ACFR)

DATES: 1977-

ARRANGEMENT: Chronological

DESCRIPTION:

These are the official public financial reports of budget accounts and expenditures of all county agencies. The auditor is required within 180 days after the close of each fiscal year to prepare and make available to county commissioners an annual financial report in accordance with Utah State Code. Copies of this report are filed with the state auditor.

RETENTION:

Retain permanently

DISPOSITION:

May 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 until scanned and then destroy.

Computer data files: Retain in Office permanently.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11297

1

TITLE: Bond and tax anticipation notes

DATES: 1882-

ARRANGEMENT: None

DESCRIPTION:

These are notes used by counties pursuant to an appropriation resolution for bonds in anticipation of payable ad valorem taxes and constitute a full obligation of the county.

RETENTION:

Retain for 1 year(s) after resolution of issue

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 after being redeemed and then destroy.

PRIMARY DESIGNATION:

Public UCA 51-7-10

AGENCY: Davis County (Utah). County Controller

SERIES: 11298

3

TITLE: Bond issue files

DATES: 1882-

ARRANGEMENT: None

DESCRIPTION:

These files document the implementation of significant county bonds (i.e., revenue or special bonds), but not general obligation bonds. These files includes authorizations supporting financial data, contracts or sales agreements, destruction certificates, and sample copies of bonds sold as evidence of county indebtedness.

RETENTION:

Retain permanently

DISPOSITION:

May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Bond official transcripts, GRS-1799.

AUTHORIZED: 12-01-2013

FORMAT MANAGEMENT:

Paper: Retain in Office permanently.

APPRAISAL:

These records have historical value(s).

The history of partnerships in the state may provide insight into lasting, short term, and failed partnerships. The disposition of permanent is based on the secondary historical value to researchers interested in business activities in Utah.

AGENCY: Davis County (Utah). County Controller

SERIES: 11298

TITLE: Bond issue files

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11656

3

TITLE: Capital asset lists

DATES: 1980-

ARRANGEMENT: Chronological

DESCRIPTION:

These are listings of all county property (buildings and real estate), vehicles, equipment, and furniture. Information about the property listings includes description, cost, date purchased, location, name of vendor, and depreciation.

These listings also include information when county property is disposed of either by public auction, competitive bidding, or destruction. Information about disposed property includes date, department name, description of item, value, disposition, and could include method, reason, condition, and value.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Fixed asset records, GRS-73.

AUTHORIZED: 04-20-2018

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 10 years and then delete.

APPRAISAL:

These records have fiscal value(s).

AGENCY: Davis County (Utah). County Controller

SERIES: 11656

TITLE: Capital asset lists

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11883

3

TITLE: Circuit breaker reimbursement records

DATES: 1982-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

This is the circuit breaker reimbursement report submitted to the State Tax Commission showing abatements accompanied by a letter requesting reimbursement to the county. Indigent and elderly citizens may file for homeowner's credit with the county commission on or before May 1 of each year. Recorded information includes: serial number, name, tax, subtotals, and grand totals.

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 3 years and then destroy.

APPRAISAL:

These records have administrative value(s).

The county commission "shall compile a list of claimants and the homeowner's credits granted to them for the purposes of obtaining payment from the General Fund for that portion of the claimant's liability for property taxes accrued represented by the credits granted. Upon certification by the [state tax] commission the payment shall be made to the county" (UCA 59-2-1206 (1992)).

AGENCY: Davis County (Utah). County Controller

SERIES: 11883

TITLE: Circuit breaker reimbursement records

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11650

3

TITLE: Computer daily cash receipts

DATES: 1985-

ARRANGEMENT: Chronological

DESCRIPTION:

These are receipts issued for money received into county accounts from all sources. Includes date of payment, department, or fund to which money belongs, receipt number and amount paid.

RETENTION:

Retain for 3 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:

Computer data files: Retain in Office for 4 years and then delete.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11880

3

TITLE: Corrected assessment rolls

DATES: 1990-

ARRANGEMENT: Chronological, thereunder numerical by property tax number

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Tax rolls of all property tax assessments within Davis County. Copy maintained by Auditor for reference and to respond to questions and complaints. The record includes date, serial number, property description, total evaluation, assessed valuation, total exemptions, value as corrected, and property tax amount due.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1993

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s). This disposition is based on the administrative needs expressed by the office.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 26113

3

TITLE: Credit card reconciliations

DATES: 1991-

ARRANGEMENT: Alphabetically.

DESCRIPTION:

This series includes the reconciliation form, documentation, and monthly statements of credit card expenditures for Davis County.

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:

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private (UCA 63G-2-302)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2020.

AGENCY: Davis County (Utah). County Controller

SERIES: 11651

3

TITLE: Departments deposit slips

DATES: 1980-

ARRANGEMENT: Chronological

DESCRIPTION:

These are bank cashiers' slips showing the amount and date of deposit of monies into county accounts.

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.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11648

3

TITLE: Electronic check files

DATES: 1940-

ARRANGEMENT: Numerical by check number

DESCRIPTION:

These are digital images of checks issued and are maintained solely as a quick reference source.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 1 year and then delete.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11654

3

TITLE: Equalization files

DATES: 1960-

ARRANGEMENT: Chronological

DESCRIPTION:

These files document the activities of the Board of Equalization. Records include copies of agenda, valuation notices, appraisal reports, notices of adjustment, and lists of appeals. These files also include documents originated by the taxpayer and county-generated working papers.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Board of Equalization records, GRS-234.

AUTHORIZED: 05-18-2021

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Protected. 63G-2-305(51)

AGENCY: Davis County (Utah). County Controller

SERIES: 11657

3

TITLE: General ledgers

DATES: 1885-

ARRANGEMENT: Chronological

DESCRIPTION:

These are summaries showing the amount of receipts from and disbursements of each department. May also include accounting adjustments in the form of manual journal entries.

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:

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11619

3

TITLE: General obligation bond

DATES: 1882-

ARRANGEMENT: Chronological

DESCRIPTION:

These issued bonds are not payable solely from revenues other than those derived from ad valorem taxes. They constitute a full general obligation of the county for the prompt and punctual payment of principal and interest. The revenue derived from the sale of bonds shall be applied only to the purpose specified in the order of the county legislative body.

RETENTION:

Retain for 1 year(s) after resolution of issue

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule General obligation bonds, GRS-57.

AUTHORIZED: 07-20-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after being paid or cancelled and then destroy.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 28731

3

TITLE: Internal audit files

DATES: 2007-

ARRANGEMENT: Chronological.

DESCRIPTION:

These records support the agency's administrative function to evaluate the effectiveness of government by conducting an audit. Records document policy and procedure audits performed at the office, department, and agency level and are used to create the final report. Information may include personnel information and may be used in litigation proceedings or employee disciplinary actions.

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: 09/2015

FORMAT MANAGEMENT:

Paper: Retain in Office for 10 years after completion of audit and then destroy.

Computer data files: Retain in Office for 10 years after completion of audit and then delete.

APPRAISAL:

These records have administrative value(s).

RETENTION JUSTIFICATION:

10 year retention is based on advice from agency's auditor.

AGENCY: Davis County (Utah). County Controller

SERIES: 28731

TITLE: Internal audit files

(continued)

PRIMARY DESIGNATION:

Protected Utah Code 63G-2-305(10)(2015)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Davis County (Utah). County Controller

SERIES: 26722

3

TITLE: Internal audit final summary reports

DATES: 2007-

ARRANGEMENT: Chronological by year thereunder numerical by report number.

DESCRIPTION:

These records support the agency's administrative function to evaluate the effectiveness of government by conducting an audit. Records document initial findings and final recommendations for improving the implementation and compliance of policies and procedures in the audited area.

RETENTION:

Retain permanently

DISPOSITION:

May 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 permanently.

Computer data files: Retain in Office permanently.

APPRAISAL:

These records have administrative, and/or historical value(s). These records are of historical interest as they document the application of the agency's policies and procedures and provide insight into any structural or program changes as a result of the audit findings.

AGENCY: Davis County (Utah). County Controller

SERIES: 26722

TITLE: Internal audit final summary reports

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2015.

AGENCY: Davis County (Utah). County Controller

SERIES: 29441

3

TITLE: Mid-budget changes

DATES: 2009-

ARRANGEMENT: none

DESCRIPTION:

These records are used to document the intended appropriation of funds. Information may include budget requests, proposals, and reports documenting the status of appropriations.

RETENTION:

Retain until administrative need ends

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:

APPRAISAL:

These records have fiscal value(s).

AGENCY: Davis County (Utah). County Controller

SERIES: 11641

3

TITLE: Official County Levy records

DATES: 1980-

ARRANGEMENT:

DESCRIPTION:

These files contain various forms which report to the county auditor the official levies set by the county commission, city councils, school boards, and special district directors. Includes the names of the government entity, year, purpose of levy, legal authorization, mills levied, total levy, certification by taxing unit (date and authorizing signature), and certification by county auditor. Attached to these forms are all necessary back up information.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Official county levy records, GRS-228.

AUTHORIZED: 03-01-1991

FORMAT MANAGEMENT:

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

Computer data files: Retain in Office for 10 years and then delete.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 27310

1

TITLE: Pending distribution of unclaimed property reports

DATES: 1958-

ARRANGEMENT: Chronological by date entered

DESCRIPTION:

The County files a detailed report annually with the Division of Unclaimed Property. This record is used to track unclaimed property and to transfer funds and associated records to Unclaimed Property in accordance with Utah Code. The report includes the name, last known address (if available), and the amount of each unclaimed and uncashed check. Unclaimed checks are usually unclaimed reimbursements, refunds, and overpayments. Unclaimed property also include net proceeds (after taxes & incidentals) from the tax sales of real and personal property. These files include unclaimed checks covering disbursements for county expenses. They include the check number, date, amount, purpose, and name of payee.

RETENTION:

Retain for 5 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: For records beginning in 1958 through 2009. Retain in Office for 1 year and then transfer to Division of Unclaimed Property.

Computer data files: For records beginning in 2010 and continuing to the present. Retain in Office for 5 years and then delete.

APPRAISAL:

These records have fiscal, and/or legal value(s). Custody of these administrative records is passed to the Division of Unclaimed Property.

AGENCY: Davis County (Utah). County Controller

SERIES: 27310

TITLE: Pending distribution of unclaimed property reports

(continued)

PRIMARY DESIGNATION:

Protected 63G-2-305(51)

AGENCY: Davis County (Utah). County Controller

SERIES: 31110

3

TITLE: Popular Annual Financial Report (PAFR)

DATES: 2024-

ARRANGEMENT: Chronological by fiscal year.

DESCRIPTION:

A supplement to the Annual Comprehensive Financial Report (ACFR) with simpler, "popular" reports designed to assist those who need or desire a less detailed.

RETENTION:

Retain permanently

DISPOSITION:

May 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 until administrative need is met and then transfer to State Archives.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11644

1

TITLE: Property tax register

DATES: 1896-

ARRANGEMENT: Chronological

DESCRIPTION:

These are the minutes of the Board of Equalization. The County Commission serves as the Board of Equalization determining tax relief measures in the county. The minute books are not a recording of the proceedings of the board meetings, but rather a list of the decisions affecting taxation (both abatements and increases) made by the board. It is used to document the tax abatements given by the board to the indigent, the aged, the disabled (and their widows), and veterans (and their widows). Includes the name of the person, lots affected, a description of the property affected (block or section, plat, township, and range), the amount abated or increased (the assessed value of the estate, improvements, and personal property), the total amount abated, and any relevant remarks.

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 until scanned and then destroy.

Computer data files: Retain in Office permanently.

APPRAISAL:

These records have administrative, fiscal, and/or historical value(s). Audit reports may be used during the next audit cycle to monitor compliance with internal control program recommendations. They document agency functions and have research value.

AGENCY: Davis County (Utah). County Controller

SERIES: 11644

TITLE: Property tax register

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 28674

3

TITLE: Requests for bid proposals

DATES: 2005-

ARRANGEMENT: Alphabetical by name of vendor

DESCRIPTION:

These records support the agency's function to perform county-wide accounting services in accordance with Davis County Code. Records document project bid proposals submitted by private vendors and are used to make purchasing decisions for new equipment and systems. Information includes vendor contact information as well as proposed costs and advantages over similar equipment or programs. Confidentiality agreements may also be included.

RETENTION:

Retain for 6 year(s)

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:

Computer data files: Retain in Office for 6 years after decision and then delete.

APPRAISAL:

These records have administrative, and/or fiscal value(s). These records are critical in aiding the County in making efficient and fair financial decisions in procuring services, products, etc.

AGENCY: Davis County (Utah). County Controller

SERIES: 28674

TITLE: Requests for bid proposals

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Protected. 63G-2-305(1),(2),(6)(2014)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2020.

AGENCY: Davis County (Utah). County Controller

SERIES: 11884

3

TITLE: Returned valuation notices

DATES: 1972-

ARRANGEMENT: Chronological, thereunder alphabetical by surname

DESCRIPTION:

This file contains valuation notices which were mailed to taxpayers, but were returned from the post office as undeliverable. They are used to document the mailing and non-receipt of the original tax notices.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Tax redemption records, GRS-732.

AUTHORIZED: 03-01-2016

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 5 years and then delete.

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

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11632

3

TITLE: Revenue bonds

DATES: 1882-

ARRANGEMENT: None

DESCRIPTION:

These bonds are issued by the county commission payable solely from revenues attributable to the extension and improvements to revenue producing facilities in accordance with Utah State Code.

RETENTION:

Retain for 1 year(s) after resolution of issue

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Bond official transcripts, GRS-1799.

AUTHORIZED: 12-01-2013

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after being paid or cancelled and then destroy.

APPRAISAL:

These records have fiscal value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11885

3

TITLE: Tax exempt properties records

DATES: 1993-

ARRANGEMENT: Alphabetical by name

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These files include the original application and subsequent renewal forms. Applications that did not qualify for exemption are also included in these records.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1993

FORMAT MANAGEMENT:

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

Computer data files: Retain in Office for 5 years and then delete.

APPRAISAL:

These records have administrative value(s).

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

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11658

1

TITLE: Tax sales' minutes

DATES: 1965-

ARRANGEMENT: Chronological

DESCRIPTION:

These are the minutes of the actual sale of real property at tax sales. Includes the date, time and place of sale, names of persons conducting the sale, description of proceedings, listing of properties sold, amount of taxes owed, purchase price, and name(s) of purchaser.

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.

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11882

3

TITLE: Taxing entities proposed tax rate report

DATES: 1923-

ARRANGEMENT: Chronological, thereunder alphabetical by entity

DESCRIPTION:

Report forms submitted by individual taxing entities to the county auditor, reporting on desired tax levies for property taxes. Information is computed, compiled, sent to the State Tax Commission who retains them permanently. The report includes proposed tax rate worksheet (year, county, taxing entity, purpose of levy, value on tax rolls, adjustments, sum of evaluations, percentage of taxes collected (preceding five years average), adjusted sum of valuations, proposed tax rate, signed and dated certifications by taxing entity's authorized agent, and county auditor), a tax rate summary, a certified tax rate worksheet, and a budget affidavit.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1993

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs expressed by the department.

AGENCY: Davis County (Utah). County Controller

SERIES: 11882

TITLE: Taxing entities proposed tax rate report

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11665

3

TITLE: Tentative budget working files

DATES: 1981-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records support the agency's function to perform all countywide accounting services. Records document the county's tentative budget for the upcoming fiscal year. Information includes projected expenditures and income.

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 5 years and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 08/2015.

AGENCY: Davis County (Utah). County Controller

SERIES: 11666

3

TITLE: Travel reimbursement files

DATES: 1980-

ARRANGEMENT: Chronological

DESCRIPTION:

These records support the agency's function to perform all countywide accounting services. These records document the reimbursement of employees for authorized travel. Information includes initial travel requests and authorizations as well as travel details and costs.

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:

Computer data files: Retain in Office for 4 years and then delete.

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 10/2020.

AGENCY: Davis County (Utah). County Controller

SERIES: 11668

4

TITLE: Valuation notices

DATES: 1975-

ARRANGEMENT: Chronological, thereunder numerical by tax identification number

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Notices are mailed by the county auditor to "all owners of real estate" on or before July 22 of each year prior to the proposed increase of tax revenues (UCA 59-2-919(4)(1992)), to notify property owners of their proposed valuations. Information includes: year, tax district and serial number, property type, location, current and previous market values, name and address of owner, tax amounts for taxing entities if proposed budget adopted and no budget change made, date, time, and location of public budget meeting, total property tax, and explanation and instruction sheet explaining evaluation.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Transitory tracking records, GRS-1720.

AUTHORIZED: 03-09-2021

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 1 year and then delete.

APPRAISAL:

These records have fiscal value(s).

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

AGENCY: Davis County (Utah). County Controller

SERIES: 11668

TITLE: Valuation notices

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Davis County (Utah). County Controller

SERIES: 11664

3

TITLE: Value and tax rate report

DATES: 1975-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

Report of property tax adjusted values and tax rates after equalization, Auditor Year-end Report (233b), submitted to the State Tax Commission by March 1 of the following year. Includes date, county code, area code, tax rate, numbers and taxable values of all centrally assessed values (transportation and utilities), locally assessed values (residential, commercial, industrial, and agricultural real estate and mobile homes), relief values (veterans, blind, etc), and totals.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 06/1993

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs expressed by the department.

AGENCY: Davis County (Utah). County Controller

SERIES: 11664

TITLE: Value and tax rate report

(continued)

PRIMARY DESIGNATION:

Public