

## Retention and Classification Report

**Agency:** Logan (Utah). Finance (2982)

PO Box 527  
255 N Main  
Logan, UT 84323-0527  
435 750-9800

**Records Officer:** \_\_\_\_\_

22715	Budget working papers
22714	Daily cash report
22717	Merit employee performance-related records
22713	Receipt books
22774	Successful bid proposals
22773	Unsuccessful bid proposals

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22715

3

**TITLE:** Budget working papers

**DATES:** 1999-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These files contain working papers used to assist in the preparation of municipal budgets and to justify budget requests presented to the city council. Includes departmental budget requests, work-up sheets, cost estimates, and rough data accumulated in the preparation of annual budget estimates, related correspondence, and documentation for approval of final budget.

**RETENTION:**

Retain for 2 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 destroy.

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22715

**TITLE:** Budget working papers

(continued)

**SECONDARY DESIGNATION(S):**

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

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22714

**TITLE:** Daily cash report

**DATES:** 1997-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 3.00 cubic feet.

**DESCRIPTION:**

These reports provide a daily record of cash balances, receipts, and disbursements.

**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:**

Paper: Retain in Office for 1 year and then transfer to Agency Record Center. Retain in Agency Record Center for 3 years and then destroy.

**APPRAISAL:**

These records have fiscal value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22717

3

**TITLE:** Merit employee performance-related records

**DATES:** 1998-

**ARRANGEMENT:** Alphabetical

**DESCRIPTION:**

These are performance-related records pertaining to summary performance appraisal, including appraisals and job element standards upon which they are based; and any supporting documentation.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Performance plans and evaluations, GRS-1966.

**AUTHORIZED:** 06-01-2017

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after date of appraisal and then destroy.

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Private

**SECONDARY DESIGNATION(S):**

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

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22713

3

**TITLE:** Receipt books

**DATES:** undated

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are receipts issued for money received into municipal 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:**

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

**APPRAISAL:**

These records have fiscal value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22774

3

**TITLE:** Successful bid proposals

**DATES:** 1999-

**ARRANGEMENT:** Alphabetical by item, thereunder alphabetical by vendor

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These files contain the formal proposals submitted in response to the bidding process to provide products or services to a municipal agency by a private vendor which was awarded the municipal contract.

**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:**

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

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Logan (Utah). Finance

**SERIES:** 22773

3

**TITLE:** Unsuccessful bid proposals

**DATES:** 1999-

**ARRANGEMENT:** Alphabetical by item, there under alphabetical by vendor

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

These are solicited and unsolicited unsuccessful (rejected) bids and proposals to provide products or services to an agency by a private contractor.

**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:**

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

**APPRAISAL:**

These records have administrative value(s).

**PRIMARY DESIGNATION:**

Public