

# Retention and Classification Report

**Agency:** Department of Natural Resources. Office of Energy Development (3570)

Office of Energy Development  
60 East South Temple  
Salt Lake City, UT 84111  
801-538-8732

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

30054	Executive correspondence
29638	Renewable Energy Systems Production Tax Credit records
29637	Renewable Energy Systems Tax Credit records

**AGENCY:** Department of Natural Resources. Office of Energy Development

**SERIES:** 30054

3

**TITLE:** Executive correspondence

**DATES:** 2011-

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

Incoming and outgoing business-related correspondence, regardless of format or mode of transmission, that provides unique information relating to the functions, policies, procedures or programs of a state agency. These records document executive decisions made regarding agency interests. Executive decision makers may include the Director, Chief Administrative Officer, Public Information Officer or other internal administrators as identified by the executive office.

**RETENTION:**

Permanent. Retain for 5 year(s) after separation

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule State agency executive correspondence, GRS-1758.

**AUTHORIZED:** 07-12-2018

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years after separation and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office for 5 years after separation and then transfer to State Archives with authority to weed.

**APPRAISAL:**

These records have administrative, and/or historical value(s). These records have historical value based on their evidence of government deliberations, decisions, and actions relating to major social, economic, and environmental issues.

**AGENCY:** Department of Natural Resources. Office of Energy Development

**SERIES:** 30054

**TITLE:** Executive correspondence

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Department of Natural Resources. Office of Energy Development

**SERIES:** 29638

3

**TITLE:** Renewable Energy Systems Production Tax Credit records

**DATES:** 2012-

**ARRANGEMENT:**

**DESCRIPTION:**

These records support the agency's function to advance alternative energy development in the state by administering the tax credit incentives programs (Utah Code 63M-4-401(2017) and Utah Code 63M-4-503(2014)). Records document applications for tax credit awarded for utilizing large-scale renewable energy systems and selling all or part of the energy produced, as well as the agency's efforts to certify eligibility for participation and to monitor compliance. Information includes certification requests, correspondence establishing agreements with participants, system specifications, the validated amount of tax credits, state tax forms for each tax period, invoices documenting amount of energy sold, inspection reports, third-party verifications, and related records.

**RETENTION:**

Retain for 7 year(s) after expiration of permit or license

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Contract and lease records, GRS-1731.

**AUTHORIZED:** 07-30-2019

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after expiration and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

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

**AGENCY:** Department of Natural Resources. Office of Energy Development

**SERIES:** 29638

**TITLE:** Renewable Energy Systems Production Tax Credit records

(continued)

**PRIMARY DESIGNATION:**

Exempt Utah Code 63M-4-401(6)(2014)

**SECONDARY DESIGNATION(S):**

Private. Utah Code 63G-2-302(1)(I) and (2)(b)(2017)

Public. Utah Code 63G-2-201(2)(2017)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 01/2018.

**AGENCY:** Department of Natural Resources. Office of Energy Development

**SERIES:** 29637

3

**TITLE:** Renewable Energy Systems Tax Credit records

**DATES:** 2012-

**ARRANGEMENT:** Alphabetical, thereunder chronological.

**DESCRIPTION:**

These records support the agency's function to advance alternative energy development in the state by administering the tax credit incentives programs (Utah Code 63M-4-401(2017) and Utah Code 63M-4-503(2014)). Records document applications for tax credit awarded for investment in the purchase and installation of qualified renewable energy systems (residential and commercial), the agency's efforts to certify an entity's eligibility to receive the credit in accordance with statute and rules, and the authorized tax credit amount. Information includes applications, correspondence related to application review and approval, state tax forms, and evidence of compliance, such as invoices, schematic diagrams, and photographs of completed systems.

**RETENTION:**

Retain for 7 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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**AUTHORIZED:** 07-30-2019

**FORMAT MANAGEMENT:**

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**AGENCY:** Department of Natural Resources. Office of Energy Development

**SERIES:** 29637

**TITLE:** Renewable Energy Systems Tax Credit records

(continued)

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Exempt Utah Code 63M-4-401(6)(2014)

**SECONDARY DESIGNATION(S):**

Private. Utah Code 63G-2-302(1)(I) and (2)(b)(2017)

Public. Utah Code 63G-2-201(2)(2017)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 01/2018.