

SCHEDULE 8 – PUBLIC WORKS DEPARTMENT

Section 1: Cemetery Records

8.101: CEMETERY BURIAL REPORTS

These historical records document burials, interments, and disinterments. Information identifies burial rights, permits, ownership of plots, layout, location of and information about deceased persons and related records. Documents are required from mortuary with information on the individual being buried.

RETENTION – Permanent

8.102: CEMETERY PLOT BUY BACK FILES

These are documents requesting that the city buy back cemetery plots.

RETENTION - Permanent

8.103: CEMETERY PLOT PURCHASE CONTRACTS

This is the contract issued when individuals choose to pay off plots within one year and not at the time of purchase.

RETENTION - Permanent

8.104: CEMETERY PERMISSION TO BURY DOCUMENTS

These are documents giving permission to bury in a plot that is not in the deceased's name.

RETENTION - Permanent

8.105: CEMETERY TRANSFER OF PLOTS

These records document transfer plots from one individual to another or from one location to another.

RETENTION - Permanent

8.106: CEMETERY WORK BOOK TICKETS

These are handwritten tickets used by cemetery on any plot purchased or burial.

RETENTION - Permanent

8.107: CERTIFICATE OF BURIAL RIGHTS

Also called deeds, these are copies of actual deeds issued to owners of cemetery plots. They are used to keep an accurate record of plot ownership and whether they have perpetual care. They include deed number, date issued, name of owner, amount of ground purchased, description of grave purchased, amount paid, and receipt number.

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RETENTION – Permanent

8.108: DISINTERMENT FILES

These files are documentation of disinterment from the Orem cemetery.

RETENTION – Permanent

8.109: GRAVE MARKER INSTALLATION REQUEST

The files are documentation from the monument companies to set headstones.

RETENTION – Permanent

8.110: GRAVE OPENING ORDERS

These are a signed authorization to dig graves. They are used to guarantee a body is interred in a specific burial plot and to generate the interment and lot records. They include time order was received, deed number, date, lot owner's name, authorization signature, address and telephone number, name of person being interred, location of grave by plot, block, grave number, and tier.

RETENTION – Permanent

8.111: INTERMENT/DISINTERMENT REGISTERS

These registers serve as a cross-reference to plat books. They are arranged numerically by interment number. They include cemetery cards, interment number, name of deceased, permit number, date interred, certificate number, date of death, location of grave by plot, lot, tier, name of undertaker, owner of lot, and pertinent information on removal (if applicable).

RETENTION – Permanent

8.112: INTERMENT REPORTS

These are copies of a monthly report submitted by the sexton to the Health Department's local registrar when deceased was buried in the cemetery. They are used to verify a report was made. They include "name of the decedent, place of death, date of burial, and name and address of the funeral director or other person making the interment" (UCA 26-2-18(2) (1997)).

RETENTION – Permanent

8.113: LOT BOOKS/FILES

These books or files contain the exact location of all persons buried in the cemetery. They

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include plot, lot, grave location, and lot ownership record.

RETENTION – Permanent

8.114: MAP BOOKS

This is a live program which contains maps of the cemetery and is used daily to locate specific grave sites. The program also includes index, plat, and lot pages which serves as a key to locating specific graves. This record is constantly updating.

RETENTION – Permanent

***MISCELLANEOUS CEMETERY DOCUMENTS *Does this include anything different than what is already listed above? If not, it can be deleted...**

Every document collected and saved since the opening of the cemetery.

RETENTION - Permanent

8.115: RECEIPT BOOKS

These are receipts issued for money received for burial lots, deeds, and lot sales. They are used to record money generated by the cemetery. They include date, receipt number, name of person making payment, amount received, fees involved, credits, cash sales, and may include the address of person making payment.

RETENTION - Permanent

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8.201: CAPITAL PROJECT STATUS REPORT

This is a monthly report of all current capital improvement projects. The report includes information on funding (comparing amounts), extra work orders, and over-run authorizations for each project.

RETENTION – Retain 1 year, then destroy

8.202: CLASS “C” ROAD FUNDING PROJECT FILES

These project files document the funding for Class “C” roads. Class “C” funding is money allocated to each municipality from the Transportation Fund. The files include amount of funds allocated and how they were spent for each project (man-hours, vehicle usage, and material used).

RETENTION - Retain for 3 years after claim, audit, or litigation settled, then destroy

8.203: COMPLAINT FILES

These files document complaints received and how they were responded to by the department (e.g., streets, sanitation, traffic signals). They include name and address of complainant, date received, description of problem, and action taken.

RETENTION – Retain 2 years or until resolution of issue, then destroy

8.204: CONCRETE MAINTENANCE RECORDS

These records document the replacement of concrete maintenance necessary when the municipality is responsible for damage caused by municipal vehicles (e.g. garbage trucks, snow plows) or problems caused by storm damage or other acts of nature. Maintenance may either be done by the municipality or contractors through the bidding process. These records are used for budget purposes and indicate the completion of the project. They may include a card file, copies of receipts, pay vouchers, contracts, bids, correspondence, extra work orders, estimates, sketch or diagram, photographs, council district information, and proof of mailing estimate.

RETENTION - Retain for 7 years, then destroy

8.205: DRAINAGE MAINTENANCE AGREEMENTS

These are agreements between the municipality and canal or irrigation companies. The agreements allow water be diverted into drainage systems maintained by these companies. The

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municipality pays them for this service. The agreements include date, company's name and address, provisions of the agreement, payments to be made, and signatures of municipal council, and company representative.

RETENTION - Permanent

8.206: DRAINAGE SYSTEM REPAIR LIST

This is a list of all drainage facilities in the system. It is used to prioritize which drains need maintenance. It includes size, type and condition of drainage pipe, type of clean out box, location of facility and condition, depth from flow line to top of lid on road surface and a brief description of the problem.

RETENTION - Retain until superseded, then destroy

8.207: DRAWINGS AND DIAGRAMS

These are drawings and blueprints of engineering “as-built” projects. They are used by the public and city personnel to establish existing information for all city locations. They include drawings of street construction, sidewalks, storm drains, waterlines, reservoirs, public facilities, and other city building projects, providing date, legend, city title, scale and actual drawings.

RETENTION – Permanent, may be transferred to the State Archives

8.208: ENCROACHMENT AGREEMENTS

These are agreements between the municipality and property owners allowing them to extend fences or plants (bushes and trees) within the municipal right of way. The municipality reserves the right to revoke the agreement and to require the property owner to remove the fences or plants upon request. The agreements include date, licensee's name and address, agreement terms, licensee's notarized signature, and signatures of the city council chair and city manager.

RETENTION - Permanent

8.209: EXCAVATION PERMIT APPLICATIONS

These applications are used by individuals and contractors requesting to work in the municipal right-of-way for demolitions or excavations. The application includes job address, date, owner/agent name and job address, a location description of intended excavation, size, purpose, and agreement to comply with all state laws and municipal ordinances.

RETENTION - Retain for 1 year after expiration, then destroy

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8.210: EXCAVATION PERMIT BILLINGS

These billings are sent to contractors for the inspections of excavations on the municipal right-of-way. The permits may be issued over the telephone with parties having agreements with the municipality and are then billed for inspections. The billings include contractor's name and address, date permit issued, location, inspection date, and inspection costs.

RETENTION - Retain for 3 years, then destroy

8.211: FLOOD CONTROL PERMIT APPLICATIONS

These applications are completed by developers and homeowners requesting a permit to construct within a flood plain. They are also required for the construction of any facility or discharge of any runoff into specific municipal-wide facilities. The permit provides that the structure or operation covered could be stopped, removed or destroyed by the municipality in a flood emergency and that all structures are subject to municipal inspection at permittee's cost. The applications include firm's or individual's name, address, and telephone number; proposal's description, including construction type, purpose, location (including engineering calculations, and any special conditions); grantee's signature; date; recommendations on whether request should be approved or denied; and (if approved) director's signature.

RETENTION - Permanent, may be transferred to the State Archives

8.212: INTERLOCAL AGREEMENTS

These are agreements between the county and municipalities within the county to provide public works services. They include date, city's name, provisions of the agreement, payments to be made, and signatures of the city and county representatives.

RETENTION - Permanent

8.213: INTERSECTION CASE FILES

These files record data on all municipal streets. They are used by traffic engineers and technicians when investigating a particular intersection to determine appropriate traffic regulations. They contain traffic volume (counts taken either mechanically or manually), requests or complaints received which required a study and response concerning specific intersections and work order outline to be done at specific intersections, and a traffic accident history.

RETENTION - Retain for 7 years, then destroy

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8.214: MAPS AND PLATS

These are city maps and plats for surveys and maintenance of city property and facilities. They are used for research purposes by the public, other city departments, and title companies. They include townships and range, rights-of-way, monument markers, lot measurements, street names, centerline measurements, blocks, and subdivision names.

RETENTION - Retain until superseded, then destroy

8.215: MATERIALS TEST RESULTS

These reports contain the results of sieve analysis and nuclear density tests on asphalt, road base concrete, and soils. They are used for conformance of specifications for approval of various materials used on municipal construction projects. Reports are also used for reference on future municipal project work. Reports include date, type of material, weight of material, amount of tests performed, and results of tests (sieve analysis results, percent of compaction, and cylinder compressive tests).

RETENTION - Retain for 3 years after project completed, then destroy

8.216: PERMITS TO WORK IN A PUBLIC WAY

These are permits issued for private companies to work on city property ("public way") for demolitions, excavations, blasting, crane operations, barricade installations, concrete construction (curb, gutter, sidewalks), or the moving of heavy equipment. They include job address, date, name of owner/agent at job address, state license classification, diagram of work required, checklist of existing utilities and construction and traffic control.

RETENTION - Retain for 1 year after bond expires, then destroy

8.217: RESURFACING BILLINGS

These billings are sent to contractors and public utilities for resurfacing municipal roads, alleys, or other public places. Persons are required to restore the pavement surface after the completion of excavations on the municipal right-of-way. Persons doing excavation work may request the municipality to restore the surface and are then charged the costs. The billings include contractor's name and address, date, completion date, location, road width, cut width, total square footage, amount, and total balance.

RETENTION - Retain for 4 years, then destroy

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8.218: REVIEW FILES

This is a duplicate set of plans submitted by developers for subdivisions, and commercial or industrial complexes. It is used to verify compliance with ordinances and design criteria for streets and alleys. They include plans and related correspondence.

RETENTION - Retain for 3 years after completion of project, then destroy

8.219: SIGNALIZED INTERSECTION RECORDS

These records are registers, card files, and similar records providing an inventory of all traffic signs, signal equipment and the timing set-up of each signalized intersection. They are used to determine compliance with safety guidelines and as a record of changes on a historical basis. They include information concerning poles, signal head information, and signal control.

RETENTION - Retain for 7 years after signal device removed, then destroy

8.220: SPECIAL ASSESSMENT PLATS

These plats show the location of properties that are affected by special assessments. Plats are used for reference and for compilation of the tax roll. They include footage, actual property lines, township and range, rights-of-way, monument markers, lot measurements, blocks, subdivision names, and color coding to indicate properties being assessed.

RETENTION - Retain for 5 years after district is completed, then destroy

8.221: STREET CLEANING RECORDS

These files document all street cleaning projects. They include reports, logs or similar records documenting street cleaning operations.

RETENTION - Retain for 1 year, then destroy

8.222: STREET MAINTENANCE RECORDS

These files document the repairs and maintenance work on municipal streets, street lights, and sidewalks. They include reports, logs, or similar records, completed on a daily, weekly, and/or monthly basis.

RETENTION - Retain for 3 years, then destroy

8.223: TRAFFIC DRAWINGS

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These are original drawings or area maps of streets. They are used to determine whether changes are needed in school zones, pedestrian crossings, intersections, signalized intersections, and street stripping. Drawings are used as a reference tool for the performance work.

RETENTION - Retain for 4 years after revised, then destroy

8.224: TRAFFIC SIGNAL CONFLICT MONITOR LOG

This is a log showing when each conflict monitor was serviced (a safety device that functions to avoid two opposite green lights showing at the same time). It is used for maintenance purposes. The log includes location, type of conflict monitor and date serviced.

RETENTION - Retain for 7 years, then destroy

8.225: TRAFFIC TROUBLE CONTROL REPORT

This report is generated by telephone calls from private citizens or police departments concerning traffic signals that require repairs. Report is necessary for verification in litigation cases. It includes location, name of person reporting, date, time, report of trouble, description of trouble found, repair made, by whom, time arrived and time completed.

RETENTION - Retain for 7 years or until litigation completed, then destroy

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Section 3: Fleet Records

8.301: AUCTION VEHICLE RECORDS

Vehicles/equipment that is sold at auctions, competitive bidding, or destruction.

RETENTION – Retain for 5 years after disposition of asset, then destroy

8.302: AUTOMOTIVE SERVICE EXCELLENCE CERTIFICATION COPIES

Official employment document; the Fleet Mechanic keeps originals.

RETENTION – Permanent

8.303: AUTOMOBILE TITLES

Records which prove governmental ownership of the vehicle. Fleet mechanic keeps a photocopy of signed over title in vehicle folder.

RETENTION – Retain for 2 years, then destroy

8.304: FLEET EDUCATION INFORMATION

Teaching aids, such as manuals, textbooks, etc.

RETENTION – Retain until end of project, then transfer to archives

8.305: FLEET SERVICES SAFETY MEETING RECORDS

Weekly fleet safety training meeting documents.

RETENTION – Transitory, retain until no longer needed

8.306: SPACE UTILIZATION REPORTS

These are reports on the amount of floor space in municipal buildings. They are used for planning purposes. The report includes number of rooms, square footage per room, and room capacity.

RETENTION – Retain until superseded or obsolete, then destroy

8.307: VEHICLE BID SPECIFICATIONS

Specifications for various vehicles purchased by the City.

RETENTION – Retain 4 years, then destroy

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8.308: VEHICLE EMISSION CERTIFICATION FILES

Vehicle emission certification for both the city shop and its mechanics as required by UCA.

RETENTION – Retain 3 years after disposition, then destroy

8.309: VEHICLE FILTER RECORDS

Daily maintenance records on all municipal vehicles.

RETENTION – Retain 2 years, then destroy

8.310: VEHICLE FLEET WORKLOAD REPORTS

Requests for maintenance, service, cleaning, or repair.

RETENTION - Transitory, retain until no longer needed

8.311: VEHICLE MAINTENANCE RECORDS

These records document the inspection, repair and maintenance of government-owned vehicles. Information includes vehicle identification, usage, and related records. Daily maintenance records on all municipal vehicles, used to provide maintenance history and include work order number, dates, maintenance performed, mileage of vehicle, problem type, driver's name, and action taken.

RETENTION – Retain for 3 years after disposition of asset, then destroy

8.312: VEHICLE WIRING DIAGRAMS

Fleet accesses most diagrams through online subscriptions. Vehicle specific shop manuals and wiring diagrams are sold with the surplus vehicle or are thrown away when vehicle is sold.

RETENTION - Transitory, retain until no longer needed

8.313: VEHICLE SCHEDULING CALENDAR

Daily log of city vehicles brought to Fleet for repair.

RETENTION – Retain 3 years, then destroy

8.314: VEHICLE REGISTRATION CERTIFICATES

Motor vehicle registration forms document ownership.

RETENTION – Retain until after final action, then destroy

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Section 3: Fleet Records

8.315: WORK ORDER AUTHORIZATION FORMS

These are authorization forms for repair or maintenance work on department vehicles, equipment, or municipally-owned facilities or structures.

RETENTION – Retain for 3 years, then destroy

8.316: WORK ORDER LOG

This is a log of all work orders. It is used for reference to verify that work was performed. Includes work order number, work order request, dates received and completed, record of trouble calls, and work completed.

RETENTION – Retain for 3 years, then destroy

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Section 4: Geospatial Records

8.401: AERIAL PHOTOGRAPHIC MAPS

These are large aerial photographs of the municipality, used for informational purposes. The photographs are taken periodically to illustrate changes in development. The maps may include zoning boundary lines.

RETENTION - Permanent

8.402: BOUNDARIES RECORDS

These geospatial records of administrative boundaries include county, municipal, precinct, tax district, subdivision, and other important municipal boundaries.

RETENTION – Permanent, may transfer to State Archives

8.403: INLAND WATER RECORDS

These geospatial records contain information pertaining to hydrologic features located in Utah municipalities. These are lakes, streams, ponds, and watersheds.

RETENTION - Permanent, may transfer to State Archives

8.404: LOCATION RECORDS

These geospatial records contain information pertaining to geodetic networks and control points. They include latitude and longitude coordinates.

RETENTION - Permanent, may transfer to State Archives

8.405: PLANNING AND CADASTRE RECORDS

These geospatial records contain information pertaining to reference locations (or points on the earth) and planning and zoning information.

RETENTION - Permanent, may transfer to State Archives

8.406: PROPERTY ADDRESSING

These are geospatial point features include a point id (address) , point type, capture method, last update, last editor, last address used at the location, street name, unit number (for multiple buildings on one parcel), and the reason for changing an address. This is to be kept on an ongoing basis for addressing properties as they are subdivided or annexed into American Fork City.

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Section 4: Geospatial Records

RETENTION - Permanent

8.407: TRANSPORTATION RECORDS

These geospatial records contain information pertaining to the transportation routes in Utah municipalities. These include street centerlines, street locations, street names, and railroad routes.

RETENTION - Permanent, may transfer to State Archives

8.408: UTILITIES AND COMMUNICATION RECORDS

These geospatial records contain information pertaining to utilities found in Utah municipalities. These may include telephone infrastructure, electricity transmission lines, storm sewer pipes, and septic tanks.

RETENTION - Permanent, may transfer to State Archives

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Section 5: Maintenance Records

8.501: AMERICANS WITH DISABILITIES ACT RECORDS

These records document compliance with the Americans with Disabilities Act (ADA). They include surveys of municipal buildings to determine accessibility for the physically handicapped, federal regulations, proposals for implementing the act, correspondence, resolutions, and solutions to access problems.

RETENTION - Retain for 15 years, then destroy

8.502: AS-BUILT CONSTRUCTION PLANS AND SPECIFICATIONS

Final plans and specifications for approved and constructed buildings, facilities, road and bridges. Documents construction of new buildings or facilities as well as renovation of owned buildings and rented buildings.

RETENTION - Permanent, may be transferred to the State Archives

8.503: BUILDINGS AND GROUNDS MAINTENANCE LOG

This log records all repairs made to municipal buildings and grounds. It is used to verify that repairs were made.

RETENTION - Retain for 3 years after completion of repairs, then destroy

8.504: EQUIPMENT MAINTENANCE AND REPAIR RECORDS

These are records of service repair and maintenance of municipal equipment, including office machines and furniture.

RETENTION - Retain for 2 years, then destroy

8.505: GASOLINE SALES TICKETS

These are logs, reports, or similar records documenting mileage and gasoline, oil, and diesel fuel used by the municipal vehicles. (Copies of credit card sales slips used to verify the purchase of gasoline.)

RETENTION - Retain for 2 years, then destroy

8.506: HYDRANT MAINTENANCE CARD FILES

These card files (or other similar discrete media) document the maintenance of fire hydrants. They are used to locate fire hydrants and to verify annual inspections which document they are functioning properly. They include location, notations and dates of annual inspections indicating

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Section 5: Maintenance Records

physical characteristics, operations, flow check, pressure and leakage.

RETENTION – Retain for 1 year after final action, then destroy

8.507: HYDRANT MAINTENANCE INVENTORIES

These inventories are regularly updated and reprinted to document the maintenance of fire hydrants. They are used to locate fire hydrants and to verify annual inspections which document they are functioning properly. They include location, notations and dates of annual inspections, indicating physical characteristics, operation, flow check, pressure, and leakage.

RETENTION – Retain for 2 years, then destroy

8.508: MILEAGE CERTIFICATES

These are certificates issued by the dealer/manufacturer certifying the mileage is accurate on each municipally purchased vehicle.

RETENTION - Retain for 3 years, then destroy

8.509: SPACE UTILIZATION REPORTS

These are reports on the amount of floor space in municipal buildings. They are used for planning purposes. The report includes number of rooms, square footage per room, and room capacity.

RETENTION - Retain until superseded or obsolete, then destroy

8.510: VEHICLE ASSIGNMENT RECORDS

These are assignment logs, reports, authorization, and similar records relating to the assignment and use of vehicles by municipal employees or officials.

RETENTION - Retain for 1 year, then destroy

8.511: VEHICLE MAINTENANCE RECORDS

These records document the inspection, repair and maintenance of government-owned vehicles. Information includes vehicle identification, usage, and related records. (Daily maintenance records on all municipal vehicles. They are used to provide a maintenance history and include work order number, dates, maintenance performed, mileage of vehicle, problem type, driver's name, and action taken.)

RETENTION - Retain 3 years after disposition of asset, then destroy

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Section 5: Maintenance Records

8.512: WORK ORDER LOG

This is a log of all work orders. It is used for reference to verify that work was performed. Includes work order number, work order request, dates received and completed, record of trouble calls and work completed.

RETENTION - Retain for 3 years, then destroy

8.513: WORK ORDERS

These are authorization forms for repair or maintenance work on department vehicles, equipment, or municipally owned-facilities or structures. These files may also contain customer complaints concerning utility problems which require research and a resolution. They may include complaint results of investigation, meter sheets, and method of resolution. These files document complaints received and how they were responded to by the department (e.g., streets, sanitation, traffic signals). They include name and address of complainant, date received, description of problem, and action taken

RETENTION - Retain for 3 years or until resolution of any litigation, whichever occurs later, then destroy

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Section 6: Parks Records

8.601: CONSTRUCTION PROJECT FILES

These project files document the actual construction for park development, park renovation, and other recreational facility improvements. They are used for reference while projects are in progress and after completion. They include final drawings of all park/recreational facility development projects along with specifications, as-built construction drawings, and related correspondence. They may also include property acquisition records including original deeds.

RETENTION – Permanent, may be transferred to the State Archives after park closure

8.602: EMPLOYEE INFORMATION FILES (SEASONAL/FLEXIBLE)

These are copies of seasonal/flexible employees. Application does not have employees' social security number, but does have key assignments and copies of certification/training records.

RETENTION – Retain until administrative need ends, then destroy

8.603: INVENTORY OF KEYS

A record of keys that are given out to full time and seasonal/flexible employees to access buildings in city parks.

RETENTION – Retain for 1 year, then destroy

8.604: MAINTENANCE COMPLAINTS

These files contain a record of complaints or requests received from the general public concerning municipal parks and recreational facilities. They are used to verify that action was taken to resolve issues. They include date, name, telephone, and address of requesting person; type of request; and comments of foreman handling request.

RETENTION - Retain for 1 year after resolution of complaint, then destroy

8.605: PARKS FACILITY FILES

These files contain information concerning each of the city parks. They are used to maintain a record of construction projects in each park for historical and informational purposes. They include correspondence, architectural drawings, contracts, specifications, newspaper clippings, histories of individual parks, and photographs.

RETENTION - Permanent, may be transferred to the State Archives

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Section 6: Parks Records

8.606: PARKS AND PARKWAYS INSPECTION FILES

These are inspections records of all facilities in the parks and of the parkways.

RETENTION – Retain for 2 years, then destroy

8.607: PESTICIDE LICENSE/CERTIFICATE RECORDS

These files contain information concerning licenses/certificates for employees that have passed and received their pesticide license.

RETENTION – Retain for 3 years after expiration of permit or license, then destroy

8.608: SUPERVISOR'S DAILY/WEEKLY REPORTS

These report forms are compiled daily or weekly by each crew supervisor. They are used for budget planning and developing future plans. They include date, crew name, purpose of job, list of crew members, hours worked, pay amount per hours worked, total cost of labor, equipment used, and amount of rental equipment.

RETENTION – Retain for 1 year, then destroy

8.609: TREE INVENTORY GIS PROGRAM

This is an ongoing data base inventory of all City-owned trees, maintained by city horticulturist/urban forester.

RETENTION - Permanent

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Section 7: Public Utilities Records

8.701: BACKFLOW PREVENTION TEST REPORTS

These tests report the results obtained from the testing of backflow preventer equipment. The reports show maintenance work performed, parts replaced, and repairs made.

RETENTION - Retain for 3 years after subsequent test, then destroy

8.702: BACTERIOLOGICAL QUALITY ANALYSES REPORTS

These forms record water samples taken from various locations throughout the distribution system and sources of supply (raw or processed) for bacteriological tests. They include location, date of collection, name of person taking sample, type of sample taken, date of analysis, name of lab, person responsible for performing analysis, analytical method used, and results of the analysis. The State Health Department receives copies of these test forms and retains them for 40 years.

RETENTION - Retain for 5 years after subsequent test, then destroy

8.703: BILLING ADJUSTMENT RECORDS

These records document adjustments made in utility billings for debit, credits, refunds, returned checks and abatements. They include customer's name and address, type of adjustments and justification, total amount changed, and authorizing signatures.

RETENTION – Retain for 3 years, then destroy

8.704: BILLING RECORDS

These records relate to billing transactions and are used for audit purposes. They include accounts deleted, accounts transferred, routes billed, adjustments posted, reported balances, direct billing authorizations, and other records related to utility billing functions.

RETENTION – Retain for 3 years, then destroy

8.705: BILLING REGISTER

This register is an itemized list of customer accounts. It includes name of customer, service address, meter reading, water usage, water and other charges, payments, adjustments, prior balance due, and current balance due. The register is used for reference purposes.

RETENTION – Retain for 3 years, then destroy

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8.706: CHEMICAL/RADIOLOGICAL ANALYSES

These forms verify water quality and show the various locations of sampling points of water taken from the distribution system and sources of supply for chemical and radiological tests. They include location, date of collection, name of person taking sample, type of sample taken, date of analysis, name of lab, person responsible for performing analysis, method used, and results. The State Health Department receives copies of these test forms and retains them for 40 years.

RETENTION - Retain for 10 years after subsequent test, then destroy

8.707: COMPLAINT FILES

These files contain customer complaints concerning utility problems which require research and a resolution. They include complaint, results of investigation, meter sheets, and method of resolution.

RETENTION – Retain for 3 years after resolution of issue, then destroy

8.708: CONNECTION BOOKS

These books document the extension of or connection between specific property and municipal utilities. They represent the most comprehensive guide to the system. They act as the system's master listing of all diagrams of connections in the system.

RETENTION - Permanent

8.709: CROSS CONNECTION CONTROL SURVEY FILES

These files monitor potential or actual water system health hazards within specific premises. They are used to determine compliance with state laws, schedule surveys, and to write reports. They include various reports, surveys, and related correspondence.

RETENTION - Retain for 3 years after destruction of premise, then destroy

8.710: CUSTOMER APPLICATION RECORDS

These are applications completed by customers requesting water, sewer, or electric service. They are used for billing purposes. The applications include customer's name, address, and telephone number; meter information, date and approval signature(s).

RETENTION – Retain for 3 years after account closed, then destroy

8.711: CUSTOMER DEPOSIT CARDS

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These cards provide a record of customers required to pay a deposit to receive service. They include date, amount of deposit, name and address, account number, date signed, date account closed, and amount of deposit confiscated and reason.

RETENTION – Retain for 3 years after account closed, then destroy

8.712: DAILY FILTER LOG

This log records a daily instrument table of information regarding filter operations required by Utah code.

RETENTION - Retain for 5 years, then destroy

8.713: DAILY OPERATIONAL LOG

This log records daily information on plant operations such as rate of flow, chemical inventories and chemicals used, chlorine residual testing results, and turbidity amount in water. It is required by 40 CFR 130.4. An annual summary is submitted to the State Health Department.

RETENTION - Retain for 2 years, then destroy

8.714: DAILY PUMP STATION WELL REPORTS

This is a daily monitoring report of a water system. This report shows the time pumps or wells are started and stopped, hours run, power used and amount of water pumped. A summary report is usually created from these daily reports.

RETENTION - Retain for 2 years (provided summary report is compiled), then destroy

8.715: DISCHARGE MONITORING AND WATER RECLAMATION PLANT REPORTS

These are monthly and quarterly reports on the daily operations of treatment plants. They are submitted to the State Bureau of Water Pollution and to the Environmental Protection Agency (EPA). These reports are a record of the average amount of pollution discharged into the waters of the municipality from National Pollutants Discharge Elimination System (NPDES) permit holders. They document the daily operations of the Water Reclamation Plant such as sewage flow, grit removal, chlorine usage, residuals, digester gas products, and lab analytical results (40 CFR 122.41(j)(2) (1996)).

RETENTION – Retain for 5 years after creation, then destroy

8.716: DITCH FLOW DAILY REPORTS

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These records report the daily amounts delivered to various water companies. The amounts are summarized monthly and annually. They are used for litigation purposes and to verify amounts delivered. The records include name of company, date, amount of water delivered, and amount required.

RETENTION - Retain for 7 years or 4 years after litigation is settled provided summary report is compiled, then destroy

8.717: ENVIRONMENTAL PROTECTION AGENCY (EPA) GRANT FILES

These are project files maintained by the municipality for monies granted to the state of Utah and then distributed to individual local government entities. The files document the expenditures of these funds. They include a detailed listing of disbursements, receipts, grant modifications, related correspondence, and a copy of the original grant (40 CFR 30.501). The State Health Department's copy is maintained permanently.

RETENTION - Retain for 3 years after final audit, then destroy

8.718: METER BOOKS

These books record the readings of customer's water, sewer or electric meters by municipal employees. They are used for billing purposes. The books include name of employee reading meter, meter readings, date read, account number, billing code, final reading, reasons for turnoff, if meter was pulled or reinstalled, and meter charges.

RETENTION - Retain for 3 years, then destroy

8.719: METER LOCATION RECORDS

These records contain information about all meters (water). They are used to locate meters for service and billings. They include address, work order number, size of meter, contractor, owner, plumber and date installed.

RETENTION – Retain 1 year after final action, then destroy

8.720: METER REPAIR AND TESTING FILES

These records document the installation, repair, testing, and replacement of meters. They include address, work order number, date of initial installation, dates of testing and repair, and remarks.

RETENTION - Retain for 1 year after final action, then destroy

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8.721: NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM PERMITS

These are permits issued under the Clean Water Act permitting the discharge of specific pollutants under controlled conditions (40 CFR 122.28 (2008)). This applies to municipalities with a population of 100,000 or greater.

RETENTION - Permanent, may be transferred to the State Archives

8.722: PUMP STATION WELL SUMMARY REPORTS

This is the summary information compiled from the daily monitoring report of a water system. The information includes the time pumps or wells are started and stopped, hours run, power used and amount of water pumped.

RETENTION - Permanent

8.723: SEWER MAIN LOCATION PLATS

These are plat drawings of each municipal street detailing all sewer mains in the municipality system by area number. They are used to locate sewer mains. The plats include drawings of all sewer mains in municipal system showing depth of sewer mains, percentage of grade, location of lateral connections and sewer manholes, and size of lines.

RETENTION - Retain until updated or superseded, then destroy

8.724: VIDEO INSPECTION REPORTS

These are video reports taken by special monitoring cameras located at critical parts of the sewer lines. They are used to monitor conditions of the sewer lines.

RETENTION - Retain for 3 years or until updated or superseded, then destroy

8.725: WATER CONSUMPTION MONTHLY REPORTS

These reports consist of monthly statistics of daily water consumption. They are used for research and litigation purposes and to assist in predicting future flows and peak demands. The reports include water consumption in million gallons, and cubic feet from treatment plants, springs, artesian wells, pumped wells, and reservoirs along with precipitation amounts.

RETENTION - Retain for 1 year (provided annual report is compiled), then destroy

8.726: WATER FLOW ANNUAL RECORDER CHARTS

These charts are taken from recording stations in streams or wells for annual periods. They are used to determine water flows. The charts include water flow according to gauge flows, height,

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or level of aquifer in well on an annual basis.

RETENTION - Permanent

8.727: WATER FLOW WEEKLY RECORDER CHARTS

These charts are taken from recording stations in streams or wells for weekly periods. They are used to determine water flows. The charts include water flow according to gauge flows, height, or level of aquifer in well, during a weekly period.

RETENTION - Retain for 3 years (provided annual chart is compiled), then destroy

8.728: WATER MAIN CHARTS AND INDEXES

These charts show the locations of all water mains, valves, hydrants, and water services to property owners in a given area.

RETENTION - Permanent

8.729: WATER STOCK PURCHASE FILES

These files document municipal purchase of water stock from irrigation companies and/or individuals. Each year the municipality is billed for the annual assessment of water stock. The files are used to verify purchase and for yearly assessment purposes.

RETENTION - Retain for 10 years after sale of stock, then destroy

8.730: WATER TREATMENT PLANT OPERATIONAL REPORTS

This is a copy of a monthly report submitted to the State Department of Health verifying drinking water standards (40 CFR 130.4)(1989). They are used to monitor compliance with water quality standards and to verify standards were met. The reports include daily and total monthly amounts, minimum, maximum, and averages for filter operation, filter rate in gallons per minute, length of filter run; filter head loss; and minutes of backwash; amounts and kinds of chemicals used. The State Health Department maintains their copy for 10 years.

RETENTION – Retain for 5 years, then destroy

8.731: WORK ORDERS

These files contain customer complaints concerning utility problems which require research and a resolution. They include complaint, results of investigation, meter sheets, and method of resolution.

RETENTION - Retain for 3 years after date of resolution, then destroy

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8.801: ADOPT A SPOT FILES

Application and agreement created between volunteer and Orem Public Works to document who is participating; the policy and procedures of Orem Public Works; and what is expected when volunteering with Orem Public Works. Original copy retained by Orem Public Works.

RETENTION – Retain for 1 year, then destroy

8.802: COURT-ORDERED COMMUNITY SERVICE RECORDS

Application and agreement created between court-appointed volunteer and Orem Public Works to document who is participating; the policy and procedures of Orem Public Works; and what is expected when volunteering with Orem Public Works. Original copy retained by Orem Public Works. Includes copy of time sheet; original is given to volunteer doing the court-ordered hours to take back to the courts.

RETENTION – Retain for 3 years, then destroy

8.803: EAGLE SCOUTS PROJECT APPLICATIONS

Application and agreement created between Eagle Scout candidate and Orem Public Works to document who is participating; the policy and procedures of Orem Public Works; and what is expected when volunteering with Orem Public Works. Original copy retained by Orem Public Works. Includes copy of Eagle Project Workbook if presented by scout; scout takes original copy back to the Boy Scouts of America.

RETENTION – Retain for 1 year, then destroy

8.804: PESTICIDE SPRAYING RECORDS

Form used by volunteer coordinator to document when a pesticide is used by the volunteer coordinator in a park or along a roadway. Original copy retained by Orem Public Works. Includes license/certificate for employees that have passed and received their pesticide license.

RETENTION - Retain for 3 years after expiration of permit or license, then destroy

8.805: TOOL LENDING LIBRARY CHECKOUT

Equipment checkout forms to document who is participating; the policy and procedures of Orem Public Works; and what tools are borrowed. Original copy retained by Orem Public Works.

RETENTION – Retain for 1 year, then destroy

SCHEDULE 8 – PUBLIC WORKS DEPARTMENT

Section 8: Volunteer Records

8.806: VOLUNTEER SERVICE RECORDS

Document created to track what projects were worked on, who participated, the number of participants, and how many hours were completed.

RETENTION – Retain for 3 years, then destroy