

# GRS Update Proposal

## Proposed Updated Schedule (updates in magenta)

### Title

Utility customer account records (GRS-1119)

### Description

These are applications and agreements between a customer and government agency regarding utility service. They include account information collected by the agency in order to establish, provide, and bill for service.

### Retention and Disposition

Retain for 3 years after final action, and then destroy records.

## Explanation for Update

This update is intended to address a previous update that consolidated this schedule into GRS-1783 Customer request or complaint records. The crosswalk created some confusion and it became apparent that this schedule is still relevant to a specific record. An initial update proposal suggested changing the retention to 7 years after expiration of contract, but after receiving a question for the need for this extended length of time from a municipal agency, the update proposal was re-circulated with the 3 year after final action retention it had prior to being crosswalked. A second round of feedback with this retention suggested was uniformly positive (see below).

## Current Schedule

### Title

Customer application records (GRS-1119)

### Description

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 and Disposition

Retain for 3 years after final action, and then destroy records.

## Feedback - 3/15 New

Mathew,

I think 3 years after the last action on GRS-1119 is perfect. We have the active records stored in our billing system but wondered what to do with the customer applications for customers who have moved.

Thank you,

Lance Fisher  
IT Administrator  
Taylorsville-Bennion  
Improvement District  
801-968-9081 W  
801-550-8711 C

3/16/2021 8:08:20

Utility customer account records (GRS-1119)

The proposed change seems appropriate and logical.

657 7886

[tcooke@heberut.gov](mailto:tcooke@heberut.gov)

Trina N Cooke

435

Lisa Smith

9:04 AM (0 minutes ago)

to me

Looks fine, no comments.

Lisa

Nez, Sharon

8:52 AM (14 minutes ago)

to me

Utility customer account records - This update is good. Except on description the word "this contains" should be added, better yet, change it like the Site Review Planning Records.

3/16/2021 9:01:59 Utility customer account records (GRS-1119) Sounds good. This could eliminate a whole file box from my office. Love that! Your work on the retention schedules is much appreciated -- Thank you. Velva Lee Sherman, Wales Town Clerk  
[wales@cut.net](mailto:wales@cut.net)

Matt:

I didn't see anything that I would change. It looks good.

Thanks,

Bart Stanley Miller

Rodney Cook  
Thu, Mar 18, 9:26 AM  
to me

Neither of these apply to me as a school district. I have not objections to the change.

Rod

Rebecca Abbott  
Wed, Mar 17, 8:15 AM  
to me

These look good to me.

Rebecca

Looks good to me.

--

Joe R. Coccimiglio, Insurance Financial Regulator  
Utah Insurance Department  
State Office Building, Room 3110 | 350 North State Street | Salt Lake City, UT 84114  
P: 801-538-3868 - [joecoccimiglio@utah.gov](mailto:joecoccimiglio@utah.gov)



2/3/2021 17:11:55 Utility customer service agreements (GRS-1119) "I am not in favor of this proposed update. I support creating new schedules to help clear up confusion, but this amendment doesn't make much sense to me.

My immediate question when I read through this is was why do utility records would need to be kept for 7 years after expiration/termination? Is it common for entities to need to go back that long to find customer records? I have spoken with our utility department and in the last 20 years we have never had the need to go back to view a customer utility application after more than a year. In those instances it's because they've had to go to collections. I can understand why contracts with utility providers would need to be kept for several years, but I would love clarification on if there truly is a need to make the retention 7 years.

Also I am wondering what would define the difference between a utility ""application"" and a utility ""contract"". In the proposed description it references applications and agreements, not contracts. Is ""expiration of contract"" the best term that could be used, or would ""termination of application or agreement"" be more appropriate?

Our city doesn't have much storage and if the retention changes from 3 to 7 years we will likely be needing to utilize more space in the State's records facility. Not every city can access the storage facility as easily and this might cause more of a storage problem for them. "

Annemarie Plaizier

[aplaizier@kaysvillecity.com](mailto:aplaizier@kaysvillecity.com)