

Records Management Committee Meeting

Monday, February 23, 2026

1:00 p.m. to 2:00 p.m.

Utah Division of Archives and Records Service
346 S Rio Grande St
Salt Lake City, Utah 84101

Meeting Minutes

Committee Members Present:

Steve Garside
Daniel Schoenfeld
David Fleming
Kenneth Williams
Tangee Sloan

Others Present:

Kendra Yates (DARS)
Maren Peterson (DARS)
Renee Wilson (DARS)
Alyssa Stringham (DARS)
Matthew Pierce (DARS)
Paul Tonks (AG)
Lucas Hendrickson (Tax Commission)
Jessica Priskos (Tax Commission)
Joshua Nielsen (Tax Commission)
Amy Arnn (Tax Commission)
Jorge Fuentes (DHHS)
Sharon Stiegerwalt (DHHS)
Arnold Qin (Tax Commission)

Business

Kenneth Williams called the meeting to order at 1:02 PM.

Approval of January 2026 meeting minutes

Steve Garside moved to approve the minutes. Daniel Schoenfeld seconded. Daniel, Steve, David, and Ken voted in the affirmative to approve the minutes. Tangee abstained from voting because she was not at the January 2026 meeting.

Retention Schedule Review and Approval

Centrally assessed appeals work files (31388)—New, update

Submitted by Alyssa Stringham on behalf of Tax Commission

Alyssa explained that the Tax Commission is doing an overhaul of their retention schedules, which is why they have so many today. She gave a brief overview of the schedule. Steve Garside asked if they had a previous schedule for these records. Alyssa explained that they did not. This is a brand new schedule, and there wasn't a General Retention Schedule (GRS) that fit well.

Kenneth Williams made a motion to approve the schedule. Steve Garside seconded. Unanimously approved.

Centrally assessed appeals case records (31387)—New, update

Submitted by Alyssa Stringham on behalf of Tax Commission

Alyssa Stringham explained the schedule and that these records are related to the previous schedule. Kenneth Williams asked if this series had a public classification. Alyssa said most of them are going to be protected because disclosure could provide a competitive disadvantage. Lucas Hendrickson explain the underlying assessment would be kept with the previous schedule. Steve Garside was concerned about having a consistent trail for assessments. Lucas explained that the retention of 20 years should be long enough.

David Fleming made a motion to approve. Steve Garside seconded the motion. Unanimously approved.

Centrally assessed property tax returns (31389)—New, update

Submitted by Alyssa Stringham on behalf of Tax Commission

Alyssa Stringham gave a brief overview of the schedule. This is to replace some older schedules that don't reflect the Tax Commission's current business practices anymore. Kenneth Williams clarified the retention period, which is ten years.

Kenneth Williams made a motion to approve. Tangee Sloan seconded the motion. Unanimously approved.

Centrally assessed county books (31390)—New, update

Submitted by Alyssa Stringham on behalf of Tax Commission

Alyssa Stringham explained that this is a new schedule meant to replace some old schedules that don't reflect current business practices. Kenneth Williams asked whether this covers natural resources and public utilities (which is one of the schedules it is replacing). Alyssa explained that it covers those and several other types of records because they are all managed the same way. Tangee Sloan asked whether the old schedules had a 10-year retention period as well. Lucas Hendrickson explained that they are holding them for longer. But this information will also be kept in annual reports, so these aren't needed as long.

Tangee Sloan made a motion to approve the schedule. Daniel Schoenfeld seconded. Unanimously approved.

Centrally assessed general records (31391)—New, update

Submitted by Alyssa Stringham on behalf of Tax Commission

Alyssa Stringham explained that this series is similar to the last few; this is meant to replace a few old schedules.

Kenneth Williams made a motion to approve the schedule. David Fleming seconded. Unanimously approved.

Personal property tax audit records (8656)—Update

Submitted by Alyssa Stringham on behalf of Tax Commission

Alyssa Stringham explained that this is an old schedule that had never been to the RMC before. These records are audits of personal property that are conducted by the Tax Commission. Kenneth Williams clarified that the classification is first protected, then private. There is no public information in the schedule. Alyssa Stringham confirms that there is no public information in this series.

Kenneth Williams made a motion to approve the schedule. David Fleming seconded. Unanimously approved.

Managed care entity agreements (7829)—Update

Submitted by Renee Wilson on behalf of DHHS, DIH, OMC

Renee Wilson explained that this is an update to an existing schedule for the Division of Integrated Healthcare, Office of Managed Care. This covers the contracts and agreements the office has. The original retention was 6 years, and was approved forty years ago. Now they would like the retention period to be 10 years because federal law requires medical benefits records to be retained for 10 years in the event of audits or lawsuits related to fraud. The designation is public. David Fleming clarified that the trigger for the retention was the end of the contract or the completion of audits. Steve Garside mentioned that lawsuits could be filed on the last day, but they wouldn't be notified of the lawsuit until after the records are destroyed. Steve Garside recommended an extra year to make sure that this problem doesn't happen. Sharon Steigerwalt is happy to extend the retention by a year.

Steve Garside made a motion to approve the schedule, provided the retention is changed to eleven years. Kenneth Williams seconded the motion. Unanimously approved.

Other Business

Next meeting scheduled for March 23, 2026

All members present confirm they can attend the next meeting.

David Fleming moved to adjourn at 1:28 PM.