

## Retention and Classification Report

**Agency:** Moab Charter School (Utah) (3443)

358 East 300 South  
Moab, UT 84532  
435-259-2277

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

28212	Accounts Payable, Vendor, and Procurement Files
28215	Bank, Facility and Risk Management Records
28211	Board Governance and Financial Records
28216	Board Minutes & Policies
28213	Human resource and payroll related records
28214	Student Records

**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28212

1

**TITLE:** Accounts Payable, Vendor, and Procurement Files

**DATES:** 2004-

**ARRANGEMENT:** Alphabetical by name

**DESCRIPTION:**

These records are used to pay school district bills. They include copies of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts.

**RETENTION:**

Retain for 4 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is proposed and has not yet been approved.

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28215

3

**TITLE:** Bank, Facility and Risk Management Records

**DATES:** 2004-

**ARRANGEMENT:** Chronological then alphabetical

**DESCRIPTION:**

Reports of accounting information contained in the state accounting system, including budget, grant, payroll, revenue expense, accounting reports, and bank reconciliations.

**RETENTION:**

Retain for 7 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

**AUTHORIZED:** 02-11-2019

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28211

3

**TITLE:** Board Governance and Financial Records

**DATES:** 2004-

**ARRANGEMENT:** Chronological then alphabetical

**DESCRIPTION:**

These are financial use by the school board in governing the financial affairs of the school. These records are used to monitor the financial compliance of the school in relation to board policies, state and federal laws, and the school's charter. The records include audited financial statements, tax returns, state and federal program reports, Annual Financial Reports, and Annual Program Reports.

**RETENTION:**

Permanent. Retain for 5 year(s)

**DISPOSITION:**

Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Audit records, GRS-1727.

**AUTHORIZED:** 10-23-2019

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center permanently.

**APPRAISAL:**

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

**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28211

**TITLE:** Board Governance and Financial Records

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28216

3

**TITLE:** Board Minutes & Policies

**DATES:** 2004-

**ARRANGEMENT:** Chronological then alphabetical

**DESCRIPTION:**

These are the minutes of regular, special, and emergency meetings of official district committees, boards, and task forces. They may also include an official agenda. See Internal committee records

**RETENTION:**

Retain for 5 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Open meeting minutes & supplementary materials, GRS-1709.

**AUTHORIZED:** 10-28-2020

**FORMAT MANAGEMENT:**

Error - Time Period Type does not exist.

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28213

3

**TITLE:** Human resource and payroll related records

**DATES:** 2004-

**ARRANGEMENT:** Alphabetical by name thereunder chronological for payroll

**DESCRIPTION:**

These are the personnel files for all certified district employees. They are used to document employment. The files include the employment applications, authorizations for hire forms, placement records, employee history card, copies of school transcripts, pay and leave history, work performance, in-service training completion certificates and credits, evaluation records, teaching certificates, previous teaching experience, contracts, lane change requests, and related correspondence. May also include fingerprints and verification of the criminal background check.

**RETENTION:**

Retain for 65 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 2 years and then transfer to State Records Center. Retain in State Records Center for 63 years and then destroy.

**APPRAISAL:**

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

**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28213

**TITLE:** Human resource and payroll related records

(continued)

**PRIMARY DESIGNATION:**

Private



**AGENCY:** Moab Charter School (Utah)

**SERIES:** 28214

3

**TITLE:** Student Records

**DATES:** 2004-

**ARRANGEMENT:** Alphabetical

**DESCRIPTION:**

These are student cumulative files for students whose records were not transferred but no longer attend this school. They were used to document the student's attendance. They include test scores, immunization record, eye testing, and all pertinent information on the student. These student files are commonly known as "dead files."

**RETENTION:**

Retain for 3 year(s) after separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Non-transferred student files, GRS-1497.

**AUTHORIZED:** 10-01-1999

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 3 years after graduation and then destroy.

**APPRAISAL:**

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

**PRIMARY DESIGNATION:**

Private