

Retention and Classification Report

Agency: Summit Academy (Utah). Draper Campus (3469)

1225 East 13200 South
Draper, UT 84020
801-572-9007

Records Officer: _____

27517	Accounts payable
28531	Bank financial records
28534	Bond statements
28532	Certified personnel files
28533	Daily meals records
27518	General ledger
29667	Special education records
27955	Student files
27519	Time sheets

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27517

3

TITLE: Accounts payable

DATES: 2004-

ARRANGEMENT: Chronological by year thereunder alphabetical by account name.

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

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

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

Records in this series have short-term fiscal value and may be destroyed according to the approved retention schedule. The general schedule cites UCA 70A-2-725 (1995) which says that legal actions for breach of contract must be commenced within four years.

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27517

TITLE: Accounts payable

(continued)

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2018.

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 28531

3

TITLE: Bank financial records

DATES: 2005-

ARRANGEMENT: Chronological

DESCRIPTION:

These are monthly statements showing all activity connected with the agency's financial account. Includes date, name of bank, deposits, withdrawals, cash balance, interest, and other such transactions. Used in day-to-day maintenance of agency finances, as well as for special reports, as needed.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

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, fiscal, and/or legal value(s).

PRIMARY DESIGNATION:

Public UC 63G-2-301

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 28534

3

TITLE: Bond statements

DATES: 2007-

ARRANGEMENT: Chronological

DESCRIPTION:

These notes document the borrowing of money by local school boards in anticipation "of the collection of taxes or other revenue of the school district as long as it complies with the Title 11, Chapter 14, Local Government Bonding Act" (UC 53A-18-101 (2005)).

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Bonds, notes & interest payments, GRS-1801.

AUTHORIZED: 04-20-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 28532

3

TITLE: Certified personnel files

DATES: 2009-

ARRANGEMENT: Alphabetical by surname

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 after date of employment and then transfer to State Records Center. Retain in State Records Center for 63 years and then destroy.

APPRAISAL:

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

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 28532

TITLE: Certified personnel files

(continued)

PRIMARY DESIGNATION:

Private UC 63G-2-302(1)(g)

SECONDARY DESIGNATION(S):

Public. UC 63G-2-301

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 28533

3

TITLE: Daily meals records

DATES: 2009-

ARRANGEMENT: Chronological

DESCRIPTION:

These records track all aspects of the school lunches served. They contain reports of a la carte items, milk and meals served, and sales of lunches by category (free, reduced, paid, adult). The records are computed on a daily basis, are used as a gauge for future planning, and are referenced as needed.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Lunch room summary of meals served report, GRS-1534.

AUTHORIZED: 06-01-1999

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public UC 63G-2-301

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27518

3

TITLE: General ledger

DATES: 2004-

ARRANGEMENT: chronological by date of entry

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These are summaries showing receipts and disbursements of each department or school. May also include documentation from subsidiary ledgers to general ledger and accounting adjustments in the form of general entries.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule School general ledgers, GRS-1316.

AUTHORIZED: 12-01-1996

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 9 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

Records in this series have short-term fiscal value. These records may be destroyed according to the established retention schedule.

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27518

TITLE: General ledger

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 29667

3

TITLE: Special education records

DATES: 2011-

ARRANGEMENT: Chronological, thereunder alphabetical by last name.

DESCRIPTION:

These records document the progress and participation of students enrolled in special education. Records includes individualized education program records (IEPs), evaluations, parental information and correspondence, assessments and related information.

RETENTION:

Retain for 27 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Special education student records, GRS-1476.

AUTHORIZED: 11-05-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 25 years and then destroy.

APPRAISAL:

These records have legal value(s).

Legal retention based on Utah Code 53E-7-202(1)(a)(2018).

PRIMARY DESIGNATION:

Exempt 34 CFR 300.562

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 06/2018.

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27955

3

TITLE: Student files

DATES: August 2004-

ARRANGEMENT: alphabetical by student's last name

ANNUAL ACCUMULATION: 0.50 cubic feet.

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 15 year(s)

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 2 years and then transfer to State Records Center. Retain in State Records Center for 13 years and then destroy.

APPRAISAL:

These records have administrative value(s).

The general retention schedule requires that these records be retained three years after graduation.

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27955

TITLE: Student files

(continued)

PRIMARY DESIGNATION:

Exempt

FERPA

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27519

3

TITLE: Time sheets

DATES: 2004-

ARRANGEMENT: chronological by date thereunder alphabetical by employee surname

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These are records which verify hours worked (regular and overtime), leave earned (vacation, sick, emergency, conference/professional) and taken by school district employees.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Timekeeping records, GRS-1902.

AUTHORIZED: 02-20-2019

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

APPRAISAL:

These records have fiscal value(s).

Records in this series have short-term fiscal value and may be destroyed according to the established retention schedule.

PRIMARY DESIGNATION:

Public

AGENCY: Summit Academy (Utah). Draper Campus

SERIES: 27519

TITLE: Time sheets

(continued)

SECONDARY DESIGNATION(S):

Private. UCA 63-3-302 (1)(e) (2008)