

Retention and Classification Report

Agency: Salt Lake City School District (Utah). Personnel Services (1093)
440 East 100 South
Salt Lake City, UT 84111
801-578-8340

Records Officer: Britta Barney

84829 Administrative subject files
84837 Committee files
84835 Correspondence files
16403 *District certification review committee files
84815 Employee history cards
84819 Employee's withholding allowance certificates
84851 Fellowship grant leave files
84842 Job description and selection files
84828 *Job description report
84847 Lawsuit actions case files
84825 Monthly insurance reports
84817 Personnel files
84832 Personnel report
84844 Remediation files
84849 Salary schedule files
84833 School reports
84824 Substitute teacher card file
84823 Substitution record
85193 Teacher application university files
84822 Unhired employment applications

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84829

3

TITLE: Administrative subject files

DATES: [ca. 1975]-

ARRANGEMENT: Alphabetical by subject

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These files are the department's subject files. They are used for reference purposes and as support for the administrative functions of the office. The files contain correspondence, notes, reports, charts, graphs, and brochures on a variety of subjects including administrative expectations, Division of Family Services, honorariums, leave policy, law enforcement, and suspension and expulsion policies.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year or until updated and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the department.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84837

3

TITLE: Committee files

DATES: 1978-

ARRANGEMENT: Alphabetical by committee name

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These are files of both department and district committees which either affect the Personnel Department or the department has a staff member represented on the committee. The files include correspondence, notes and minutes of various committees such as the Assignment Load Committee, Classified Position Review Committee and other ad hoc committees.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the department.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84835

3

TITLE: Correspondence files

DATES: 1966-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These are convenience correspondence files used for reference purposes. They contain intra-departmental and inter-departmental correspondence and memoranda.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative

This retention reflects the administrative needs expressed by the department.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 16403

3

TITLE: District certification review committee files

DATES: 1974-1985.

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

These files are used to document salary lane changes of district certified employees. These files include minutes of meetings and applications for Class Approval for Lane Change Credit (for individuals and groups).

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 10/01/1987.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until microfilmed and then destroy provided microfilm has passed inspection.

Microfilm master: Retain in State Archives permanently.

APPRAISAL:

Administrative Historical

This retention is based upon the administrative needs of the division to document decisions and for reference purposes. These minutes are the record copies of the Certification Committee meetings and as such should be maintained permanently for historical value.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84815

3

TITLE: Employee history cards

DATES: 1950-

ARRANGEMENT: Alphabetical by employee's name

ANNUAL ACCUMULATION: 1.50 cubic feet.

DESCRIPTION:

These cards are the master employment record of employees of the Salt Lake City School District. They contain the basic employment history of all past and current district employees. They are used for reference and verification purposes. There is a separate card for each employee. The card contains name, social security number, payroll number, sex, birth date, school service record, salary, education (if required), date hired by school district, certification record (if the employee is certified), home address and telephone number, insurance, and the reason for termination. After termination of employment, the cards filed with the inactive cards.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 100 years after birth or until verification of death and then transfer to State Archives with authority to weed.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the district. These are the master personnel records for district employees. The district has determined it is important to maintain these records for the life of the employee. Because these records contain information valuable to family historians, they should be transferred to the State Archives.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84819

3

TITLE: Employee's withholding allowance certificates

DATES: 1987-

ARRANGEMENT: Alphabetical by employee's name

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These are Internal Revenue Service (IRS) forms completed by each district employee. They are used to authorize the deduction of income taxes from individual earnings in relation to the number of claimed exemptions. The form includes the name of the employee, address, social security number, marital status, signature, and the number of claimed tax deductions.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 4 years after superseded or termination employment and then destroy.

APPRAISAL:

Administrative

This retention is based on the School District General Records Retention Schedule and the requirements of the Internal Revenue Service.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84851

3

TITLE: Fellowship grant leave files

DATES: 1968-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These binders contain requests for sabbatical leave and fellowship grants for employees to continue their education. The fellowship grants entitle teachers to receive half their annual pay while they are attending college. These binders include applications and letters of intent, correspondence, notes, and approval notices.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84842

3

TITLE: Job description and selection files

DATES: 1977-

ARRANGEMENT: Alphabetical by job title

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These are job descriptions and selection files for administrative positions within the school district. The files contain a description of the various jobs, correspondence concerning the positions, lists of people who applied for the positions, interview and screening notes, selection committee notes, resumes of applicants, and vacancy announcements.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84828

3

TITLE: Job description report

DATES: s 1974.

ARRANGEMENT: Numerical by job classification number, thereunder alphabetical by job title

TOTAL VOLUME: 0.20 cubic feet.

DESCRIPTION:

This is a report based on a study conducted by the Institute of Industrial Relations from the University of Utah College of Business. The report concerns the implementation of an integrated pay program for classified employees within the Salt Lake City School District. The study reports the findings, gives recommendations on implementing the pay program, and makes suggestions on how to organize the program. The report also describes the job-related responsibilities of all classified positions in the district.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 5 years or until administrative needs are met and then transfer to State Archives.

APPRAISAL:

Administrative Historical

This retention is based on the administrative needs expressed by the personnel department and the report's value in documenting personnel practices and policies. Though the report is over a decade old, it is used regularly.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84828

TITLE: Job description report

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84847

3

TITLE: Lawsuit actions case files

DATES: 1974-

ARRANGEMENT: Alphabetical by name of employee

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These case files document legal or other formal actions taken by employees or job applicants against the school district. These files also include files concerning employees whom the school district has taken legal action against for criminal activity. The specific contents of individual files vary greatly. They may include some or all of the following: correspondence, notes, complaints against the employee, employee's complaints against the district, request of hearing by the employee, court subpoena, grievance report, guidelines for termination, termination notice, copies of legal filings, medical reports, photocopies of checks and other financial information, recommendations for renewal of teaching certificate, and photocopies of police reports.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 7 years after all litigation has been completed and then destroy.

APPRAISAL:

Administrative Legal

This retention is based on the administrative expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84825

3

TITLE: Monthly insurance reports

DATES: 1989-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

These are monthly computer printouts which are generated to aid the updating and administration of employee insurance policies. The printouts contain the name of the employee, social security number, employee number, birth date, home address, insurance company or companies (the printouts are broken down by life, health and dental), and the date that the insurance became effective.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84817

3

TITLE: Personnel files

DATES: 1942-

ARRANGEMENT: Alphabetical by employee's surname

ANNUAL ACCUMULATION: 3.00 cubic feet.

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 65 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/2004.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year after termination and then transfer to State Records Center. Retain in State Records Center for 64 years and then destroy.

Microfilm master: Retain in Archives for 65 years and then destroy.

Microfilm duplicate: Retain in Office for 65 years and then destroy.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84817

TITLE: Personnel files

(continued)

APPRAISAL:

Administrative This disposition is based on, Schedule 94, Item 1.

This disposition is based on the administrative needs expressed by the Personnel Office.

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. UCA 63G-2-302(1)(a), 63G-2-302(1)(e), 63G-2-302(2)(a)

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84832

3

TITLE: Personnel report

DATES: 1987-

ARRANGEMENT: chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This is a bi-weekly report submitted by the Personnel Department to the school board. This is used to update and inform the board members on the status of employment within the school district. It includes the names of individuals being hired, as well as their position, location of work, and starting salary. The report also gives the names of people who have left the district as well as their position, school, and reason for leaving.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84844

3

TITLE: Remediation files

DATES: 1980-

ARRANGEMENT: Alphabetical by name of employee

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These files document the remediation of unsuccessful employee performance. It is the policy of the district to assist the individual (usually a teacher) to have a better performance record. The files include correspondence, notes, medical evaluations (if necessary), committee reports, teaching goals, teacher evaluation, review of termination (if the teacher was terminated and believes that it was unjustified), and referral for remediation.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84849

3

TITLE: Salary schedule files

DATES: 1970-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These are the official salary files. They are used to document each individual salary scale and to determine salaries for specific categories of employment. Each schedule includes a printed schedule divided into steps and categories indicating specific assigned salaries. Footnotes may explain increases or calculation formulas. Attached to the salary schedule are computer printouts that specify salaries per step, per lane, and work calendar.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 10 years and then transfer to State Archives.

APPRAISAL:

Administrative Historical

This retention is based on discussions with the staff of the personnel office and reflect their concerns. They believe these records are critical to understanding pay scales in the district. The files are also valuable historically to document yearly salary negotiations. These negotiations are carefully noted in these scales.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84833

3

TITLE: School reports

DATES: 1982-

ARRANGEMENT: Alphabetical by school name

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These are files for each individual school in the district. They contain correspondence, memoranda, requests for additional pay, vacancy announcements and other related position information. They are used by the Personnel Department to keep track of vacancies, employee problems and other items of interest at each of the schools within the district.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84824

3

TITLE: Substitute teacher card file

DATES: 1989-

ARRANGEMENT: Alphabetical by name of substitute teacher

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This is a card file listing all available substitute teachers in the Salt Lake City School District. The card file includes name of substitute teacher, home address and telephone number, subjects that the substitute teacher can teach, dates and places where the person has substituted. These cards are updated whenever a substitute teacher is given a teaching assignment and are then removed at the end of the school year if the substitute teacher is no longer available.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year or until updated and then file in personnel file.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the office.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84823

3

TITLE: Substitution record

DATES: 1980-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

This is a record of leave granted to teachers within the district and the name of the substitute replacement. It is used for easy reference and serve as a record of teachers' absences. These records are organized into binders and contain lists of the schools within the district. On each list, the names of the regular and substitute teachers are listed and include categories for absence (bereavement, personal, illness and other) and the length of absence.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office for 1 year and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the department's staff.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 85193

3

TITLE: Teacher application university files

DATES: [ca. 1961]-

ARRANGEMENT: Alphabetical by employee's surname

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These are informational packets sent by university and college placement centers on potential employees that have made application to teach in the Salt Lake City School District. They are used in the hiring process. They include recommendations on teaching abilities, letters of recommendation, evaluations of student teaching, and statements from cooperating university supervisors.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 09/01/1991.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

Paper: Retain in Office until candidate hired or until application is no longer active and then destroy provided files are retained for no longer than 3 years.

APPRAISAL:

Administrative

This retention is based on conversations with the staff of the Personnel Office and reflect their administrative needs.

AGENCY: Salt Lake City School District (Utah). Personnel Services

SERIES: 84822

3

TITLE: Unhired employment applications

DATES: 1987-

ARRANGEMENT: Alphabetical by applicant's name

ANNUAL ACCUMULATION: 12.00 cubic feet.

DESCRIPTION:

These are the job applications for persons applying for certified and classified positions, but were not hired. They were used in the hiring process and for creating affirmative action reports. The files may include applications, interview reports, college placement information, student teaching information, a copy of the individual's teaching certificate, college transcripts, and resumes.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1989.

FORMAT MANAGEMENT:

The retention and disposition information on this schedule applies to the record copy which can be in any format. The record copy can include different formats. Format management information provided here is for the purpose of managing records that are being either stored by or transferred to Utah State Archives.

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

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the department. These applications are kept on file for future openings.