

# Retention and Classification Report

**Agency:** South Summit County School District (Utah) (1123)  
375 East 300 South  
Kamas, UT 84036  
435-783-4301

**Records Officer:** Susan Palmer

01811 \*Audit reports  
04481 \*Financial records  
26738 Investigation case files  
23827 Personnel files  
03937 \*Warrant registers

**AGENCY:** South Summit County School District (Utah)

**SERIES:** 1811

3

**TITLE:** Audit reports

**DATES:** 1951-1952.

**ARRANGEMENT:** Alphanumerical

**DESCRIPTION:**

These are reports prepared by external auditors examining and verifying the school district's financial activities for the year. "The audit required for any fiscal year shall be completed within six calendar months after the close of the fiscal year" (UCA 51-2-2 (1995)). The audit is required to include "the financial statements; the auditor's opinion on the financial statements; a statement by the auditor expressing positive assurance of compliance with state fiscal laws identified by the state auditor; a copy of the auditor's letter to management that identified any material weaknesses in internal controls discovered by the auditor and other financial issues related to the expenditure of funds received from federal, state, or local governments to be considered by management; and management's response to the specific recommendations" (UCA 51-2-3(1) (1995)).

**RETENTION:**

Retain Permanent. In Archives custody.

**DISPOSITION:**

Transfer to the State Archives with authority to weed.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 12/01/1996.

**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 State Archives permanently with authority to weed.

**AGENCY:** South Summit County School District (Utah)

**SERIES:** 1811

**TITLE:** Audit reports

(continued)

**APPRAISAL:**

Administrative Fiscal Historical This disposition is based on Utah School Districts General Retention Schedule, Schedule 5, Item 4.

Audit reports verify financial activity in the agency. Audit reports may be used during the next audit cycle to monitor compliance with internal control program recommendations. They document agency functions and have research value.

**PRIMARY CLASSIFICATION:**

Public

**AGENCY:** South Summit County School District (Utah)

**SERIES:** 4481

3

**TITLE:** Financial records

**DATES:** 1923-1957.

**ARRANGEMENT:** Alphanumerical

**DESCRIPTION:**

**STATE RECORDS COMMITTEE STATUS:**

This retention has not been approved by the State Records Committee.

**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 State Archives permanently with authority to weed.

**AGENCY:** South Summit County School District (Utah)

**SERIES:** 26738

3

**TITLE:** Investigation case files

**DATES:** 2008-

**ARRANGEMENT:** Chronological by date

**DESCRIPTION:**

These records contain unique information in rough notes or drafts assembled or created and used to prepare or analyze other documents. The information adds proper understanding to the formulation and execution of policies, decisions, actions, or responsibilities.

**RETENTION:**

Retain 1 year after case closed.

**DISPOSITION:**

Destroy.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 12/01/1992.

**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 case is closed and then destroy.

**APPRAISAL:**

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 33.

**AGENCY:** South Summit County School District (Utah)

**SERIES:** 26738

**TITLE:** Investigation case files

(continued)

**PRIMARY CLASSIFICATION:**

Protected UCA 63G-2-305(9), 63G-2-305(10), 63G-2-305(11)

**AGENCY:** South Summit County School District (Utah)

**SERIES:** 23827

3

**TITLE:** Personnel files

**DATES:** 1960-

**ARRANGEMENT:** Alphabetical by surname

**DESCRIPTION:**

These are the personnel files for all classified district employees. They are used to document employment. The files usually contain the employment applications, authorization for hire forms, employee history card, pay and leave history, work performance and evaluation records, reassignment of personnel forms, termination forms and related correspondence. May also include fingerprint records and verification of a criminal background check.

**RETENTION:**

Retain 53 years or 2 years after retirement.

**DISPOSITION:**

Destroy.

**STATE RECORDS COMMITTEE STATUS:**

This retention was approved by the State Records Committee on 05/01/1998.

**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 53 years or until 2 years after retirement and then destroy.

**APPRAISAL:**

This disposition is based on Utah School Districts General Retention Schedule, Schedule 14, Item 2.

**AGENCY:** South Summit County School District (Utah)

**SERIES:** 23827

**TITLE:** Personnel files

(continued)

**PRIMARY CLASSIFICATION:**

Public

**SECONDARY CLASSIFICATION(S):**

Private

Controlled

Protected.

attorney work product, collective bargaining strategies,  
settlement negotiations



**AGENCY:** South Summit County School District (Utah)

**SERIES:** 3937

3

**TITLE:** Warrant registers

**DATES:** 1915-1921.

**ARRANGEMENT:** Alphanumerical

**DESCRIPTION:**

These registers are numerical listings of check numbers of all checks issued by county. They include vendor number, name, date of payment, invoice number, and/or purchase number, account debit, description of expenditure, and amount.

**STATE RECORDS COMMITTEE STATUS:**

This retention has not been approved by the State Records Committee.

**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 State Records Center for 7 years and then destroy.

**APPRAISAL:**

This disposition is based on Utah County General Records Retention Schedule, Schedule 5, Item 28.

**PRIMARY CLASSIFICATION:**

Public