

Retention and Classification Report

Agency: Utah Valley University (1251)

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Records Officer: LuAnn Smith

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AGENCY: Utah Valley University

SERIES: 20992

3

TITLE: Adverse action files

DATES: 1967-

ARRANGEMENT: Alphabetical by employee surname, thereunder chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Case files and related records created in reviewing an adverse action (disciplinary or non-disciplinary removal, suspension, leave without pay, reduction in force) against the employee. The file includes a copy of the proposed adverse action with supporting papers; statements of witnesses; employee's reply; hearing notices, reports, and decisions; reversal of action; and appeal of records, excluding letters of reprimand.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1996.

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

AGENCY: Utah Valley University

SERIES: 20992

TITLE: Adverse action files

(continued)

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 1.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19334

3

TITLE: American Family Life Assurance Company of Columbus files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for AFLAC. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19334

TITLE: American Family Life Assurance Company of Columbus files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19292

3

TITLE: American Income Life Insurance Company files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for American Income. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19292

TITLE: American Income Life Insurance Company files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19418

3

TITLE: Continuation of health insurance coverage files

DATES: 1986-

ARRANGEMENT: Chronological, thereunder alphabetical by employee surname

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These records document the notification of terminating employees that they may purchase continuing health insurance from their current provider. These records are required by the federal COBRA (Consolidated Omnibus Budget Reconciliation Act) laws, 26 U.S.C.A. 9801 (1986). Information includes letter to eligible former employees or dependents and a signed acknowledgment of receipt of COBRA letter.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 02/01/1998.

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

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the agency.

AGENCY: Utah Valley University

SERIES: 19418

TITLE: Continuation of health insurance coverage files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19332

3

TITLE: Copeland Companies files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Copeland. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19332

TITLE: Copeland Companies files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 24022

3

TITLE: Distribution reports

DATES: 1999-

ARRANGEMENT: Chronological by year, thereafter alphabetical by name.

ANNUAL ACCUMULATION:

DESCRIPTION:

These records document which budgets were used to pay employees. They are used to verify account payroll activity. Records include employee, account, and check history distribution reports.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 01/01/2002.

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 Agency Record Center for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy provided no investigation or audit is pending.

APPRAISAL:

Administrative Fiscal

AGENCY: Utah Valley University

SERIES: 24022

TITLE: Distribution reports

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19335

3

TITLE: Educators Mutual Insurance Association deduction files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's insurance premiums. Information includes billing statements and adjustments, check request, and college benefit registers for EMIA. Also includes lists of employee name and address changes, employees and dependents no longer eligible for insurance, and early retirees. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

AGENCY: Utah Valley University

SERIES: 19335

TITLE: Educators Mutual Insurance Association deduction files

(continued)

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19284

3

TITLE: Employment applications packet

DATES: ca. 1970-

ARRANGEMENT: Numerical by job class number

ANNUAL ACCUMULATION: 15.00 cubic feet.

DESCRIPTION:

These employment applications are sent to the Human Resource section of the college when individuals apply for faculty and staff positions. Their qualifications are then reviewed. Information includes application form or letters of interest, resumes or curriculum vitae, transcripts or diplomas, explanation of qualification, statement of teaching philosophy (if applicable), list of or letters of reference, samples of work, job announcements, tracking/scoring sheets, advertisements, and job announcement request forms.

RETENTION:

Retain 3 years.

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 6 months and then transfer to State Records Center. Retain in State Records Center for 30 months and then destroy.

Optical disks: Retain in Office for 3 years and then destroy.

AGENCY: Utah Valley University

SERIES: 19284

TITLE: Employment applications packet

(continued)

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 12.

Records in this series have temporary administrative value and may be destroyed according to the approved retention schedule.

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 20991

3

TITLE: Equal Employment Opportunity discrimination complaint case files

DATES: 1992-

ARRANGEMENT: Alphabetical by employee surname, thereunder chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Official complaint files containing complaints, related correspondence, reports, exhibits, withdrawal notices, copies of decisions, and other records as described in 29 CFR 1613.222.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 15.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 20991

TITLE: Equal Employment Opportunity discrimination complaint case files

(continued)

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-301 (1)(b) (2008)

AGENCY: Utah Valley University

SERIES: 19337

3

TITLE: FHP Health Care insurance deduction files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college benefit registers for FHP. Also included is a list of employees no longer eligible for benefits. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19337

TITLE: FHP Health Care insurance deduction files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19331

3

TITLE: Fidelity group retirement plans files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Fidelity. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19331

TITLE: Fidelity group retirement plans files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 27680

3

TITLE: Fred E. Guymon papers

DATES: 1976.

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

Fred E. Guymon (1920-2010) papers after teaching at Utah Valley Community College for 37 years. These microfiche contain book requests, correspondence, course outlines and other records.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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.

Microfiche master: Retain in State Archives permanently with authority to weed.

APPRAISAL:

Administrative Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 25.

Papers of Fred E Guymon record items of historical interest while he was there.

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Public

AGENCY: Utah Valley University

SERIES: 19329

3

TITLE: Great American Life Insurance Company (GALIC) deduction files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for GALIC. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19329

TITLE: Great American Life Insurance Company (GALIC) deduction files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19330

3

TITLE: Guardian Insurance and Annuity Company files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Guardian. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19330

TITLE: Guardian Insurance and Annuity Company files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19498

3

TITLE: Hourly time cards

DATES: 1967-

ARRANGEMENT: Chronological, thereunder alphabetical by employee surname

ANNUAL ACCUMULATION: 8.00 cubic feet.

DESCRIPTION:

Employee time cards determine how many hours an employee worked during a pay period. Information includes the pay period, employee name, Social Security number, and department.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 25.

Records in this series have only short-term administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19498

TITLE: Hourly time cards

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. Social Security number

AGENCY: Utah Valley University

SERIES: 19287

3

TITLE: Jackson National Life Insurance Company files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Jackson National. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19287

TITLE: Jackson National Life Insurance Company files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19499

3

TITLE: Leave adjustment reports

DATES: 1967-

ARRANGEMENT: Chronological, thereunder alphabetical by employee surname

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

Shows all leave adjustments made during a pay period. Shows category of adjustment, the amount, Social Security number, and employee name.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 10.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19499

TITLE: Leave adjustment reports

(continued)

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-301 (1)(b) (2008)

AGENCY: Utah Valley University

SERIES: 19500

3

TITLE: Leave applications

DATES: 1967-

ARRANGEMENT: Chronological, thereunder alphabetical by employee surname

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Applications for leave and supporting papers relating to request for and approval of employee leave.

RETENTION:

Retain 1 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 2 months and then transfer to State Records Center. Retain in State Records Center for 10 months and then destroy.

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 11.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19500

TITLE: Leave applications

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 24019

3

TITLE: Monthly deduction files

DATES: 2000-

ARRANGEMENT: Chronological by quarter, thereafter alphabetical by name.

ANNUAL ACCUMULATION: 4.00 cubic feet.

DESCRIPTION:

These records document monthly paycheck deductions and contributions. Examples of deductions and contributions include such things as Goodwill, American Federated Staff, and direct deposit.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 01/01/2002.

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 Agency Record Center for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy provided no investigation or audit is pending.

APPRAISAL:

Administrative Fiscal

AGENCY: Utah Valley University

SERIES: 24019

TITLE: Monthly deduction files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19288

3

TITLE: Oppenheimer Funds Services files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Oppenheimer. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19288

TITLE: Oppenheimer Funds Services files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 24017

3

TITLE: Payroll registers

DATES: 1998-

ARRANGEMENT: Chronological, thereafter alphabetical by name.

ANNUAL ACCUMULATION: 3.00 cubic feet.

DESCRIPTION:

These records document checks issued each pay period for contract, adjunct, hourly, and workstudy payrolls. Registers show the earnings, deductions, taxes, net income and warrant or direct deposit information.

RETENTION:

Retain 4 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 01/01/2002.

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 Agency Record Center for 1 year and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy provided no investigation or audit is pending.

APPRAISAL:

Administrative Fiscal

AGENCY: Utah Valley University

SERIES: 24017

TITLE: Payroll registers

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19501

3

TITLE: Personal injury case files

DATES: 1967-

ARRANGEMENT: Chronological, thereunder alphabetical by surname

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

These records document work-related injuries and provide prompt medical attention to employees. They are used to minimize the potential for future fraudulent claims. Information includes first report of injury forms, correspondence and related medical reports, Bureau of Labor & Statistics log and summary of occupational injuries and illnesses, yearly survey of occupational injuries and illnesses, and OSHA loss history reports.

RETENTION:

Retain 5 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 2 years and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 35.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19501

TITLE: Personal injury case files

(continued)

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Public

AGENCY: Utah Valley University

SERIES: 19374

3

TITLE: Personnel files for full-time salaried employees

DATES: 1967-

ARRANGEMENT: Alphabetical by employee surname

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Complete work history of individual while employed at the Utah Valley State College, used for proof of employment, documenting raises, direct deposit authorization, and notification of drug-free workplace. Information may include confidential employee data form, personnel action forms, direct deposit authorizations, benefit maintenance sheets, employment application, resume and transcripts, W-4 form, I-9 form, letters of appointment, copy of yearly leave report, semester appointment forms, performance appraisals, requests for verification of employment, drug-free workplace statement, screening and interview sheet, employee data change form, and employment verification forms.

RETENTION:

Retain 65 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 02/01/2006.

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 separation of employee and then transfer to State Records Center. Retain in State Records Center for 64 years and then destroy.

AGENCY: Utah Valley University

SERIES: 19374

TITLE: Personnel files for full-time salaried employees

(continued)

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 2.

Records in this series have long-term administrative value to document employment and eligibility for benefits. They may be destroyed according to the approved retention schedule.

PRIMARY CLASSIFICATION:

Private UCA 63G-2-302 (1)(e) (2008)

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-301 (1)(b) (2008)

AGENCY: Utah Valley University

SERIES: 19375

3

TITLE: Personnel files for part-time employees

DATES: 1967-

ARRANGEMENT: Alphabetical by employee surname

ANNUAL ACCUMULATION: 6.00 cubic feet.

DESCRIPTION:

Complete work history of individual while employed at the Utah Valley State College, used for proof of employment, documenting raises, direct deposit authorization, and notification of drug-free workplace. Information may include confidential employee data form, personnel action forms, direct deposit authorizations, benefit maintenance sheets, employment application, resume and transcripts, W-4 form, I-9 form, semester appointment forms, performance appraisals, requests for verification of employment, statement of ineligibility for Utah Retirement System, drug-free workplace statement, screening and interview sheet, employee data change form, and employment verification forms.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 02/01/2006.

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: For records prior to and including 2008. Retain in Office for 1 year after separation and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

Computer data files: Retain in Office for 4 years and then delete.

AGENCY: Utah Valley University

SERIES: 19375

TITLE: Personnel files for part-time employees

(continued)

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 3.

Records in this series have only brief administrative value to document employment. They may be destroyed according to the approved retention schedule.

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-301 (1)(b) (2008)

AGENCY: Utah Valley University

SERIES: 20990

3

TITLE: Position change requests and authorizations

DATES: 1975-

ARRANGEMENT: Alphabetical by department name, thereunder chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Documents used to create new positions, abolish old ones and change existing state employee positions. Information includes new position/new title/reclassification request forms and position analysis.

RETENTION:

Retain 5 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 transfer to State Records Center. Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 11, Item 37.

AGENCY: Utah Valley University

SERIES: 20990

TITLE: Position change requests and authorizations

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Utah Valley University

SERIES: 19333

3

TITLE: Pre-paid Legal Services, Inc. files

DATES: 1996-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Pre-paid Legal. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19333

TITLE: Pre-paid Legal Services, Inc. files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19289

3

TITLE: Princor Financial Services files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Princor. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19289

TITLE: Princor Financial Services files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 27494

3

TITLE: Program assessment reports

DATES: 1998-

ARRANGEMENT: Chronological by date; thereunder alphabetical by name of program or service organization.

ANNUAL ACCUMULATION:

DESCRIPTION:

These biennial reports document the assessment process for all programs and service organizations at Utah Valley University. The reports are created by each program and organization and are used to determine program effectiveness and progress. Reports are also used during the accreditation process. Information includes program goals, outcomes, objectives, criteria for success, assessment summaries and evaluations, results, and other relevant information.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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: For records beginning in 1998 through 2008. Retain in Office for 2 years after scanned and quality checked and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

Paper: For records beginning in 2009 and continuing to the present. Retain in Office until scanned and quality checked and then destroy.

Digital image: For records beginning in 1998 and continuing to

AGENCY: Utah Valley University

SERIES: 27494

TITLE: Program assessment reports

(continued)

the present. Retain in Office permanently.

APPRAISAL:

Administrative Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 25.

These records are needed administratively to document and evaluate department programs. also They also have historical value as they document program administration, achievements, outcomes, and weaknesses for all programs and services organizations at the university.

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. UCA 63G-2-302(2)(d)

AGENCY: Utah Valley University

SERIES: 19336

3

TITLE: Public Employees Health Plan (PEHP) insurance deduction files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's insurance premiums. Information includes billing statements and adjustments, check request, and college benefit registers for PEHP. Also includes lists of employee name and address changes, and employees and dependents no longer eligible for insurance. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19336

TITLE: Public Employees Health Plan (PEHP) insurance deduction files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 23341

3

TITLE: Publications

DATES: 1963-1972.

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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.

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 25.

Publications document agency history and functions. Publications have ongoing research value.

AGENCY: Utah Valley University

SERIES: 23341

TITLE: Publications

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Utah Valley University

SERIES: 19290

3

TITLE: Putnam Investments files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for Putnam. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

AGENCY: Utah Valley University

SERIES: 19290

TITLE: Putnam Investments files

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 81817

3

TITLE: Student records

DATES: undated

ARRANGEMENT: Alphabetical by surname

ANNUAL ACCUMULATION:

DESCRIPTION:

Files containing official documentation listing student's courses, grades, credits earned, and status achieved. Often referred to as a transcript.

RETENTION:

Retain 10 years after student leaves school.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 after student leaves school and then transfer to State Archives with authority to weed.

Microfilm master: Retain in State Archives permanently with authority to weed.

Microfilm duplicate: Retain in State Archives permanently with authority to weed.

AGENCY: Utah Valley University

SERIES: 81817

TITLE: Student records

(continued)

APPRAISAL:

Administrative Historical This disposition is based on Utah State General Records Retention Schedule, Schedule 8, Item 1.

These records are historical and track student courses, grades, and performance at the university.

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 24023

3

TITLE: Suspense accounts

DATES: 1998-

ARRANGEMENT: Chronological by month and pay period.

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These records document the occurrence of payments to incorrect or invalid employee accounts and to document the corrective actions taken. They also show overtime paid by hand when computers are unable to compute the figures correctly.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 01/01/2002.

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 Agency Record Center for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy provided no investigation or audit is pending.

APPRAISAL:

Administrative Fiscal

AGENCY: Utah Valley University

SERIES: 24023

TITLE: Suspense accounts

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19741

3

TITLE: Taxable wage earning reports

DATES: 1967-

ARRANGEMENT: Chronological, thereunder alphabetical by employee surname

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These records provide employees with an accurate accounting of yearly earnings to comply with Internal Revenue Service regulations. Information includes returns on income taxes such as IRS Form W-2, and reports of withheld federal taxes, such as IRS Form W-3, with related records, such as reports regarding income and social security taxes.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 24.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19741

TITLE: Taxable wage earning reports

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19419

3

TITLE: TIAA-Cref retirement premium reports

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

These records document the amount of retirement deducted and paid into individuals' retirement plans. Information includes a record of electronic transfer, adjustment transaction report, check request, copies of college benefit registers for TIAA-Cref, 403b supplemental reports, and a TIAA-Cref membership list.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 copy: Retain in Office for 2 years and then transfer to State Records Center provided records are scanned into an optical imaging system. Retain in State Records Center for 1 year and then destroy.

Optical disks: Retain in Office for 1 year or until administrative need ends and then destroy.

AGENCY: Utah Valley University

SERIES: 19419

TITLE: TIAA-Cref retirement premium reports

(continued)

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 3.

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19286

3

TITLE: Tuition waiver applications and reports

DATES: ca. 1970-

ARRANGEMENT: Chronological, thereunder alphabetical by student surname

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These records are used by Human Resources to determine eligibility of individuals applying for a tuition waiver and to track the waivers after they have been entered into the computer system. Information includes tuition waiver applications, list of hourly employees eligible to receive tuition waiver that semester, list of names and social security numbers of individuals who used the waiver that semester, and course catalog for the semester.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1997.

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

Computer data files: Retain in Office for 3 years and then delete.

Microfiche master: Retain in Archives for 3 years and then destroy.

Microfiche duplicate: Retain in Archives for 3 years and then

AGENCY: Utah Valley University

SERIES: 19286

TITLE: Tuition waiver applications and reports

(continued)

destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the agency.

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 83656

3

TITLE: Utah consortium of community colleges fund raiser files

DATES: 1986-1987.

ARRANGEMENT: chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

These files are a detailed account of fund raising effort of the Utah Community Colleges during 1986-87. They include correspondence, information on conferences held, minutes of meetings, and information about foundations and corporations which were asked for money. The Utah Community Colleges are Salt Lake Community College, Utah Valley Community College, Dixie College, Snow College, and College of Eastern Utah.

RETENTION:

Retain 3 years.

DISPOSITION:

Transfer to the State Archives with authority to weed.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1988.

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 transfer to State Records Center. Retain in State Records Center for 12 years and then transfer to State Archives with authority to weed.

APPRAISAL:

Administrative Fiscal

AGENCY: Utah Valley University

SERIES: 83656

TITLE: Utah consortium of community colleges fund raiser files

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Utah Valley University

SERIES: 19338

3

TITLE: Utah Department of Employment Security wages and separation unemployment report

DATES: 1967-

ARRANGEMENT: Chronological, thereunder alphabetical by employee surname

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

These records are used to verify the payment of monthly unemployment expenses of eligible terminated employees and to notify affected department heads. Information includes reimbursable employer billing statements, copies of memoranda to affected department heads, copies of check requests including check number, notice of Claimant Eligibility and Employer charges, and copies of terminating/last Personnel Action Form.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1997.

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

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the agency. The record copy is maintained by the Utah Department of Employment Security.

AGENCY: Utah Valley University

SERIES: 19338

TITLE: Utah Department of Employment Security wages and separation
unemployment report

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19420

3

TITLE: Utah State Retirement premium reports

DATES: 1967-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These records document the amount of retirement deducted and paid into individuals' retirement plans. Information includes funds transmittal report, contribution report, adjustment transaction report, check request, adjustments to retirement tape, State Retirement member address changes, salaries check register retirement reconciliation, printouts of college benefit registers for State Retirement, 401k supplemental reports, and a list of members on contributory and non-contributory plans.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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 copy: Retain in Office for 2 years and then transfer to State Records Center provided records have been scanned into an optical imaging system. Retain in State Records Center for 1 year and then destroy.

Optical disks: Retain in Office for 1 year or until administrative need ends and then destroy.

AGENCY: Utah Valley University

SERIES: 19420

TITLE: Utah State Retirement premium reports

(continued)

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 3.

PRIMARY CLASSIFICATION:

Private

AGENCY: Utah Valley University

SERIES: 19291

3

TITLE: Variable Annuity Life Insurance Company files

DATES: 1984-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

These insurance records are used in the verification and payment of employee's tax shelter premiums. Information includes billing statements and adjustments, check request, and college deduction register for VALIC. These records are duplicates, the original being maintained by the insurance company.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/1990.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 10, Item 9.

Records in this series have only temporary administrative value and may be destroyed according to the approved retention schedule.

AGENCY: Utah Valley University

SERIES: 19291

TITLE: Variable Annuity Life Insurance Company files

(continued)

PRIMARY CLASSIFICATION:

Private