Retention and Classification Report

Agency: Salt Lake City School District (Utah). Business Services.
Purchasing (1597)
440 East 100 South
Salt Lake City, UT 84111-1891
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Records Officer Britta Barney

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

SERIES: 84812 4
TITLE: Administrative subject files
DATES: i 1971-
ARRANGEMENT: Alphabetical by subject
ANNUAL ACCUMULATION: 0.20 cubic feet.
DESCRIPTION:

These are active administrative subject files which are used for reference purposes and contain notes, charts, memos, correspondence, brochures, and other items of information. Some of the subjects included in the files are the following: accounting, Art Committee, bid lists, Code of Ethics, correspondence, food services, goals, inventories, mailing permits, memos, policies and procedures, repairs, surplus sales, textbooks reports, vandalism, work orders, and yearbook bids. This series also includes a collection of obsolete subject files (1971-l982).

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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Paper: Retain in Office for 1 year or until updated or superseded and then destroy.

APPRAISAL:

Administrative
This retention is based upon the administrative needs expressed by the office. The obsolete files (1971-l982) should immediately be destroyed.

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

SERIES: 84767 4
TITLE: Bid files
DATES: i 1970-1976; 1980-
ARRANGEMENT: Alphabetical by name of product or project being bid
ANNUAL ACCUMULATION: 5.50 cubic feet.
DESCRIPTION:

These files relate to obtaining goods or services through the bidding process. The files include: bid forms, specifications, correspondence, the authorizing signature of the superintendent or board, and bid summary sheets.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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 and then destroy.

APPRAISAL:

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

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

SERIES: 84810 4
TITLE: Cash receipt books
DATES: i 1984-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.10 cubic feet.
DESCRIPTION:

These are completed forms which document the payment of cash. The forms provide the date of the transaction and the amount of money paid in coins, currency or checks. A list is also included stating the name of the person paying the money and the purpose of the cash transaction.

RETENTION:

Retain 3 years.

DISPOSITION:
Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:
These records are in Archives' permanent custody.

APPROVED: 12/1989

FORMAT MANAGEMENT:

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

APPRAISAL:

Administrative
This retention is based on the School District General Records Retention Schedule (1/86) and the needs expressed by the office.

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

SERIES: 84805 4
TITLE: Computer inventory posting summary
DATES: i 1988-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 5.00 cubic feet.
DESCRIPTION:

These daily and monthly computer printouts are used to verify whether the department is within its allotted budget. An annual accumulation is received at the end of the fiscal year. The printout includes batch number, expenditures, encumbrances, and daily and year-to-date overhead adjustments and totals. These are shown with daily beginning and ending balances.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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 after annual accumulation printout received and then destroy.

APPRAISAL:

Administrative Fiscal
This retention is based upon the administrative needs expressed by the purchasing agent.

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

SERIES: 84814 4
TITLE: Food product information records
DATES: [ca. 1981]-
ARRANGEMENT: Alphabetical by name of food product
ANNUAL ACCUMULATION:
DESCRIPTION:

These records are used by the purchasing agent responsible for the purchase of food items and other goods related to food preparation. The purchasing agent determines whether the products desired will meet federal food and nutrition standards. The records include detailed inventories of food items and their standings in terms of federal food standards, statements on the nutritional value of various products, information on food packaging (amount of food in each package), and other information important to the food purchasing function.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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 outdated or superseded and then destroy.

APPRAISAL:

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

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

SERIES: 84804 4
TITLE: Inventory cards
DATES: i 1958-
ARRANGEMENT: Alphabetical by type of products
ANNUAL ACCUMULATION:
DESCRIPTION:

These cards are used to maintain an inventory of supplies and equipment previously purchased by the district and their suppliers. The cards include item number, item description, names of suppliers, stock on hand, and ordering information. The cards will soon become obsolete once the automation of the file has been completed. The automated file is programmed to automatically erase obsolete information from the files once they have become full.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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 until fully automated and then destroy.

Computer data files: Retain in Office for 3 years or until file is full and then delete.

APPRAISAL:

Administrative Fiscal
This retention is based on the administrative and fiscal needs expressed by the office.

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

SERIES: 84807 4
TITLE: Payroll records
DATES: i 1984-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.40 cubic feet.
DESCRIPTION:

These completed forms are the division's copy of employee payroll records. These are kept as a reference for the division's director. The information in the records includes employee name, employee number, Social Security number, work hours, sick leave, vacation time, and completed Employee's Verification of Absence from Employment forms.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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 until updated or superseded and then destroy.

APPRAISAL:

Administrative
The record copy of all district payroll records is maintained by the Payroll Division. This retention is based on the needs expressed by the division's director.

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

SERIES: 84808 4
TITLE: Personnel records
DATES: i 1981-
ARRANGEMENT: Alphabetical by name of employee
ANNUAL ACCUMULATION:
DESCRIPTION:

These are personnel files for the division's employees. They are used for reference purposes. These files include the basic employee information of name, date of birth, address, telephone number, job application, letters of commendation, transcripts, pay and leave history, work performance and job evaluations.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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 until termination and then destroy.

APPRAISAL:

Administrative
The Personnel Department maintains the record copy of all district employees' personnel files. These files are only the convenience copies maintained by the division director.

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

SERIES: 84811 4
TITLE: Petty cash checks
DATES: i 1984-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION: 0.50 cubic feet.
DESCRIPTION:

These files document the issuance of checks for purchases and business transactions under $100.00. The files include the check payment order form (the names of the individuals involved in the transaction, accounting information, description of the item or items purchased) and a copy of the check.

RETENTION:

Retain 3 years.

DISPOSITION:
Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:
These records are in Archives' permanent custody.

APPROVED: 12/1989

FORMAT MANAGEMENT:

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

APPRAISAL:

Administrative Fiscal
This retention meets the audit and administrative needs expressed by the office.

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

SERIES: 84813 4
TITLE: Price quotation records
DATES: i 1985-
ARRANGEMENT: Alphabetical by name of vendor or goods supplied
ANNUAL ACCUMULATION: 0.40 cubic feet.
DESCRIPTION:

These records relate to the bid process for obtaining goods or services. Price quotations are given by venders and other companies estimating the cost of their services to the school district. The records include quote forms, correspondence, purchase orders and other items of information.

RETENTION:

Retain 5 years.

DISPOSITION:
Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:
These records are in Archives' permanent custody.

APPROVED: 12/1989

FORMAT MANAGEMENT:

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Paper: Retain in Office for 5 years and then destroy.

APPRAISAL:

Administrative
This retention is based on the needs expressed by the purchasing agent.

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

SERIES: 84806 4
TITLE: Problem requisitions
DATES: i 1989-
ARRANGEMENT: Numerical by requisition order number
ANNUAL ACCUMULATION:
DESCRIPTION:

These files contain copies of requisition forms which have had problems in ordering (the item is not available at the time it was ordered or some other problem). These are more carefully watched by the purchasing agent and then are discarded after the order has been filled.

RETENTION:

Retain 6 months.

DISPOSITION:
Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:
These records are in Archives' permanent custody.

APPROVED: 12/1989

FORMAT MANAGEMENT:

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Paper: Retain in Office for 6 months and then destroy.

APPRAISAL:

Administrative Fiscal
This retention is based on the administrative needs expressed by the district's purchasing agent.

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

SERIES: 84802 4
TITLE: Purchase orders
DATES: i 1974-1980; 1985-
ARRANGEMENT: Alphabetical by vendor or product name
ANNUAL ACCUMULATION: 2.50 cubic feet.
DESCRIPTION:

These are orders issued to vendors to supply specific goods or services to the district at a given price. The purchase orders include the name of the school or department ordering, the name of the supplier, the amount ordered, cost, and date.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

FORMAT MANAGEMENT:

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Paper copy: Retain in Office for 2 years and then destroy.

APPRAISAL:

Administrative Fiscal
These purchase orders are only copies of the originals which are kept in the Accounting Division. The originals are kept for 4 years.

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

SERIES: 84803 4
TITLE: Receiving slips
DATES: i 1980-1983.
ARRANGEMENT: Chronological
TOTAL VOLUME: 0.20 cubic feet.
DESCRIPTION:

These are completed forms indicating that ordered items have been received. These slips include date, name of supplier, order number, quantity, and a description of the items ordered and received.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

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 after the last transaction and then destroy.

APPRAISAL:

Administrative Fiscal
This retention is based on the fiscal and administrative needs expressed by the district's purchasing agent.

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

SERIES: 84768 4
TITLE: Requisitions
DATES: i 1976-1980; 1985-
ARRANGEMENT: Alphabetical by school and department name
ANNUAL ACCUMULATION: 7.00 cubic feet.
DESCRIPTION:

These are requests from schools or departments within the district for goods or services. They include requisition number, date, name of school or department making request, item or service to be supplied, approval, and date ordered.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1989

FORMAT MANAGEMENT:

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

APPRAISAL:

Administrative Fiscal
This retention is based on the adminstrative and audit needs expressed by the district's purchasing agent.