

Retention and Classification Report

Agency: Board of Education. Office of Education. Division of Business and Operations (1932)
250 East 500 South
P.O. Box 144200
Salt Lake City, UT 84114-4200

Records Officer

- 13002 *American Express corporate card statements
- 13001 *American Express travel account bills
- 12987 *Deputy superintendent's executive correspondence
- 12988 *Deputy superintendent's technical reference files
- 12986 *Dual Enrollment Committee minutes
- 12996 *Electronic mail access log
- 12998 *Expenditure approval log
- 13000 *Information Resource Management Advisory Committee min
- 12991 *School Fee Waivers Task Force administrative records
- 12999 *Staff meeting minutes
- 12989 *Time sheets
- 12992 *Travel authorization log for state-reimbursed travel
- 12993 *Travel authorization log for third-party-reimbursed travel
- 12994 *Travel regulations correspondence
- 12990 *Travel requests

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 13002

3

TITLE: American Express corporate card statements

DATES: 1993-2015.

ARRANGEMENT: Chronological by document date

DESCRIPTION:

Report generated by American Express showing expenditures made by state employees on agency American Express Cards.

RETENTION:

Retain 2 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 destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 5.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 13002

TITLE: American Express corporate card statements

(continued)

SECONDARY CLASSIFICATION(S):

Private.

Employee home addresses, phone numbers, and social security numbers [UCA 63G-2-302(1)(e) (2008)]

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 13001

3

TITLE: American Express travel account bills

DATES: 1993-2015.

ARRANGEMENT: Chronological by bill date

DESCRIPTION:

Requests from state agencies to the Division of Finance to pay vendors for supplies and/or services the vendors have provided to the agencies.

RETENTION:

Retain 1 year.

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 1 year and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 49.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 13001

TITLE: American Express travel account bills

(continued)

SECONDARY CLASSIFICATION(S):

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

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12987

3

TITLE: Deputy superintendent's executive correspondence

DATES: ca. 1896-2015.

ARRANGEMENT: Chronological by date of correspondence

DESCRIPTION:

Business-related correspondence which provide unique information about agency functions, policies, procedures, or programs. These records document material discussions and decisions made regarding all agency interests, and may originate on paper, electronic mail, or other media. This correspondence is filed separately from program case files, and project files.

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 5 years and then transfer to State Archives with authority to weed.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 9.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12988

3

TITLE: Deputy superintendent's technical reference files

DATES: ca. 1896-2015.

ARRANGEMENT: Alphabetical by subject

DESCRIPTION:

These files contain copies of documents retained strictly for reference and informational purposes which are not part of the official files. Include copies of reports, studies, special compilations of data, drawings, periodicals, books, clippings, brochures, catalogs, and vendor price lists.

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 until administrative need ends and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 29.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12986

3

TITLE: Dual Enrollment Committee minutes

DATES: 1993.

ARRANGEMENT: Chronological by date of meeting

TOTAL VOLUME: 0.20 cubic feet.

DESCRIPTION:

In 1993, the Utah State Legislature mandated that the State Board of Education make rules (1) to govern and regulate the transferability of credits from private or home schooling to public school for graduation purposes [UCA 53A-11-102.5(5) (1993)] and (2) determine the policies and procedures necessary in order to permit dual enrollment students to participate in extracurricular activities. This series is composed of the agenda and minutes of the committee in the State Office of Education which was established to study this issue and report to the legislature prior to the beginning of the 1994 Legislative General Session.

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 3 years and then transfer to State Archives with authority to weed.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 6.

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12986

TITLE: Dual Enrollment Committee minutes

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12996

3

TITLE: Electronic mail access log

DATES: 1993-2015.

ARRANGEMENT: Alphabetical by employee surname

TOTAL VOLUME:

DESCRIPTION:

Records which monitor the activities of a data processing system. Information includes console logs, physical, and on-line access.

RETENTION:

Retain until superseded.

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 until superseded or administrative need ends and then destroy.

Computer data files: Retain in Office until superseded or administrative need ends and then delete.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 5, Item 1.

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12996

TITLE: Electronic mail access log

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12998

3

TITLE: Expenditure approval log

DATES: 1990-2015.

ARRANGEMENT: Numerical by approval number

TOTAL VOLUME:

DESCRIPTION:

Records used as posting and control media, subsidiary to the general and allotment ledgers, and not elsewhere covered in this schedule.

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 3 years and then destroy.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 20.

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

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12998

TITLE: Expenditure approval log

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 13000

3

TITLE: Information Resource Management Advisory Committee minutes

DATES: 1993-2015.

ARRANGEMENT: Chronological by meeting date

TOTAL VOLUME:

DESCRIPTION:

The Information Resource Management Advisory Committee (IRMAC) evolved as an intersectional committee which has responsibility for formulating proposals related to improving information resource management policy and procedures at the Utah State Office of Education. The minutes to IRMAC meetings are maintained by the administrative secretary for the Agency Services Division. These minutes document the people present at the meeting, date, and items discussed.

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 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 3 years and then transfer to State Archives with authority to weed.

Computer data files: Retain in Office until paper copy is filed and then delete.

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 13000

TITLE: Information Resource Management Advisory Committee minutes

(continued)

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 6.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12991

3

TITLE: School Fee Waivers Task Force administrative records

DATES: 1992-2015.

ARRANGEMENT: Chronological

TOTAL VOLUME:

DESCRIPTION:

In 1992, a task force on school fee waivers was organized to investigate the issue of school fees and fee waivers for students who are impecunious. The task force was organized in response to school districts' expressed financial difficulty following a judicial order on October 15, 1992 that school districts must grant fee waivers to poor students. The records for this task force are maintained in a three-ring binder and include minutes, agenda, correspondence (primarily with school districts), and miscellaneous reference material.

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 3 years after completion of task force's work and then transfer to State Archives with authority to weed.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 6.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12999

3

TITLE: Staff meeting minutes

DATES: ca. 1896-2015.

ARRANGEMENT: Chronological by meeting date

TOTAL VOLUME:

DESCRIPTION:

These minutes document the people present at the Utah State Office of Education's staff meetings, dates of meetings, items discussed, and the decisions made or directives issued there.

RETENTION:

Retain 5 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 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 5 years and then transfer to State Archives with authority to weed.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 6.

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12999

TITLE: Staff meeting minutes

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12989

3

TITLE: Time sheets

DATES: ca. 1980-2015.

ARRANGEMENT: Alphabetical by employee surname, thereunder chronological

TOTAL VOLUME:

DESCRIPTION:

These records include copies of all time sheets for the deputy superintendent and immediate staff. Time sheets generally indicate the name, social security number, and daily hours worked for each employee over a two-week pay period.

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 1 year and then destroy.

APPRAISAL:

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

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. Social security number [UCA 63G-2-302(1)(e)]

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12992

3

TITLE: Travel authorization log for state-reimbursed travel

DATES: 1992-2015.

ARRANGEMENT: Numerical by authorization number

TOTAL VOLUME:

DESCRIPTION:

These records document payments made to state employees and agencies for the purpose of reimbursing travel, transportation, equipment, service, training, and other reimbursable costs. Records include correspondence, forms, travel reservations, travel authorizations, per diem vouchers, transportation requests, hotel reservations, invoices, itemized expenses, and other supporting records used to validate reimbursable expenses.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 04/01/2009.

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.

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

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 44.

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12993

3

TITLE: Travel authorization log for third-party-reimbursed travel

DATES: 1992-2015.

ARRANGEMENT: Numerical by authorization number

TOTAL VOLUME:

DESCRIPTION:

These records document payments made to state employees and agencies for the purpose of reimbursing travel, transportation, equipment, service, training, and other reimbursable costs. Records include correspondence, forms, travel reservations, travel authorizations, per diem vouchers, transportation requests, hotel reservations, invoices, itemized expenses, and other supporting records used to validate reimbursable expenses.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 04/01/2009.

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.

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

APPRAISAL:

Administrative This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 44.

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

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12993

TITLE: Travel authorization log for third-party-reimbursed travel

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12994

3

TITLE: Travel regulations correspondence

DATES: 1990-2015.

ARRANGEMENT: Chronological by date of correspondence

TOTAL VOLUME:

DESCRIPTION:

Business-related messages that document work accomplished, transactions made, or actions taken. These records do not offer unique information about agency functions, programs, or policies, though they may cite them. These records may originate on paper, electronic mail, or other media.

RETENTION:

Retain 2 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 05/01/2001.

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 destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 1, Item 16.

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12994

TITLE: Travel regulations correspondence

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Board of Education. Office of Education. Division of Business and Operations

SERIES: 12990

3

TITLE: Travel requests

DATES: 1990-2015.

ARRANGEMENT: Alphabetical by employee surname, thereunder chronological

TOTAL VOLUME:

DESCRIPTION:

Travel authorization sent to the Division of Finance. The Division of Finance files these as part of the Employee Travel Reimbursement Files.

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 1 year and then destroy.

APPRAISAL:

This disposition is based on Utah State General Records Retention Schedule, Schedule 7, Item 29.

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

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