

Retention and Classification Report

Agency: Carbon County School District (Utah) (236)

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Records Officer: Darin Lancaster

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AGENCY: Carbon County School District (Utah)

SERIES: 9649

3

TITLE: Accounts payable audit

DATES: 1989-

ARRANGEMENT: Numerical by program or location code

DESCRIPTION:

This report documents account payable. The report shows item description, transaction type, date posted, and check number.

RETENTION:

Retain 4 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 1.

AUTHORIZED: 10/18/2002

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years and then destroy.

APPRAISAL:

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 9652

3

TITLE: Accounts payable check register

DATES: 1989-

ARRANGEMENT: Numerical by check number

DESCRIPTION:

This is a check Payment Register for the Carbon School District it shows the check number, vendor number, Name Description, Invoice and the amount of the check.

RETENTION:

Retain 7 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 31.

AUTHORIZED: 05/30/1991

FORMAT MANAGEMENT:

Paper: Retain in Office for 7 years or until microfilmed and then destroy provided microfilm has passed inspection.

Computer output microfiche master: Retain in State Records Center for 7 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 7 years and then destroy.

APPRAISAL:

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 29501

1

TITLE: Budget and finance

DATES: 2017-

ARRANGEMENT: chronological

DESCRIPTION:

The tentative budget is prepared by the superintendent and filed with the school board prior to June 1. "Prior to June 22 of each year, each local school board shall adopt a budget and make appropriations for the next fiscal year" (Utah Code 53A-19-102 (1995). According to Utah Code 53A-19-101(1995), "the budget and its supporting documents are required to include: the revenues and expenditures of the current fiscal year, estimate of revenues for the succeeding fiscal based upon the lowest tax levy that will raise the required revenue, using the current year's taxable value as the basis for this calculation; and a detailed estimate of the essential expenditures for the purposes for the succeeding fiscal year." The school board is required to file a copy of the adopted budget with the state auditor and the State Board of Education.

RETENTION:

Retain 10 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is proposed and has not yet been approved.

FORMAT MANAGEMENT:

APPRAISAL:

Administrative Fiscal

AGENCY: Carbon County School District (Utah)

SERIES: 9651

3

TITLE: Financial reports

DATES: 1989-

ARRANGEMENT: Chronological

DESCRIPTION:

This monthly budget report is prepared by the business administrator for the school board in accordance with UCA 53A-19-108 (1995). The report includes amounts of all budget appropriations, disbursements from the appropriation, and percentage of disbursement, and reporting date. The report usually becomes part of the School Board Minutes.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 3, Item 6.

AUTHORIZED: 05/30/1991

FORMAT MANAGEMENT:

Computer output microfiche duplicate: Retain in State Records Center for 1 year and then destroy.

APPRAISAL:

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 22054

3

TITLE: Payroll posting report

DATES: 1999-

ARRANGEMENT: Chronological, thereunder alphabetical by name

DESCRIPTION:

This register is a numerical listing by check number and agency codes of all payroll checks issued by the county. It includes code, date, warrant number, name of employee, social security number, types and amounts of individual deductions, and may include hourly rate, and number of hours worked. Though this register is frequently used to reference specific payroll checks, it might be the only record of employee salaries and would then serve the same retirement purpose as the Employee earnings history files.

RETENTION:

Retain 65 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07/15/2015

FORMAT MANAGEMENT:

Computer output microfiche master: Retain in State Records Center for 65 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 65 years and then destroy.

APPRAISAL:

Administrative Historical

Disposition based on value of historical records of payroll for one year.

AGENCY: Carbon County School District (Utah)

SERIES: 22054

TITLE: Payroll posting report

(continued)

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

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

AGENCY: Carbon County School District (Utah)

SERIES: 9653

3

TITLE: Payroll register

DATES: 1989-

ARRANGEMENT: Numerical by social security number

DESCRIPTION:

This register is a numerical listing by check number and agency codes of all payroll checks issued by the county. It includes code, date, warrant number, name of employee, social security number, types and amounts of individual deductions, and may include hourly rate, and number of hours worked. Though this register is frequently used to reference specific payroll checks, it might be the only record of employee salaries and would then serve the same retirement purpose as the Employee earnings history files.

RETENTION:

Retain 65 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 10, Item 32.

AUTHORIZED: 07/15/2015

FORMAT MANAGEMENT:

Paper: Retain in Office for 65 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 65 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 65 years and then destroy.

APPRAISAL:

Administrative Fiscal Historical

These records document payroll history for the Carbon County School District.

AGENCY: Carbon County School District (Utah)

SERIES: 9653

TITLE: Payroll register

(continued)

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

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

AGENCY: Carbon County School District (Utah)

SERIES: 15318

3

TITLE: Personnel records

DATES: ca. 1950-

ARRANGEMENT: Alphabetical by surname, thereunder numerical by social security number

DESCRIPTION:

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

RETENTION:

Retain 65 years.

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 14, Item 2.

AUTHORIZED: 05/24/1999

FORMAT MANAGEMENT:

Paper: Retain in Office until optically scanned and then transfer to State Records Center. Retain in State Records Center for 65 years and then destroy.

Optical disks: Retain in Office for 65 years and then destroy.

APPRAISAL:

AGENCY: Carbon County School District (Utah)

SERIES: 15318

TITLE: Personnel records

(continued)

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

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

Protected. Attorney work product

AGENCY: Carbon County School District (Utah)

SERIES: 29529

3

TITLE: Policies and procedures

DATES: 2017-

ARRANGEMENT: none

DESCRIPTION:

These files contain records related to the issuance of policies and procedures and document their formulation. Includes narrative or statistical reports and studies regarding district or office operations, and related correspondence.

RETENTION:

Retain 2 years after being superseded

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 1, Item 21.

AUTHORIZED: 08/29/2017

FORMAT MANAGEMENT:

APPRAISAL:

Administrative Fiscal Legal

AGENCY: Carbon County School District (Utah)

SERIES: 25297

3

TITLE: Publications

DATES: 1930-

ARRANGEMENT: Chronological by year.

DESCRIPTION:

These are pamphlets, leaflets, studies, proposals and similar material printed by or for the school district or any of its departments, programs or schools, and made available to the public, or the last manuscript report if not published.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 1, Item 24.

AUTHORIZED: 01/05/2004

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

APPRAISAL:

Historical

Disposition based on the value of these records in documenting agency achievements, policies, procedures, and function.

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 24199

3

TITLE: Receipt distribution report

DATES: 1999-

ARRANGEMENT: Numerical by receipt number

ANNUAL ACCUMULATION: 1.00 fiche.

DESCRIPTION:

This is a monthly computer report of all cash receipts issued by the district. It includes receipt number, date of receipt, account number, description of account, source of funds, amount of receipt, and totals.

RETENTION:

Retain 4 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 20.

AUTHORIZED: 04/22/2002

FORMAT MANAGEMENT:

Computer output microfiche master: Retain in State Records Center for 4 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 4 years and then destroy.

APPRAISAL:

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 9654

3

TITLE: Retirement and distribution report

DATES: 1989-

ARRANGEMENT: Numerical by social security number

ANNUAL ACCUMULATION:

DESCRIPTION:

This is a monthly report submitted to State Retirement on amounts contributed to retirement system. It is used for verification purposes. The Office of Education sends monthly the information on magnetic tape to State Retirement and prints a paper copy for the school district, later the Retirement Office sends the district worksheets to check data. Includes social security number, member name, fund agency, period covered, amount contributed, earnings, and amounts employee and employer paid.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07/15/2015

FORMAT MANAGEMENT:

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

APPRAISAL:

PRIMARY DESIGNATION:

Private

AGENCY: Carbon County School District (Utah)

SERIES: 25888

3

TITLE: School board minutes

DATES: 1917-

ARRANGEMENT: Chronological by meeting date

ANNUAL ACCUMULATION:

DESCRIPTION:

These are minutes of regular and special meetings of the Board of Education. They are used to document the actions and decisions of the Board. School board minutes record the adoption of annual budgets; the approval of expenditures; discussions of district policies. These minute books include the time and place of meeting, board members absent and present, summary of proceedings and decisions made by the board.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 15, Item 2.

AUTHORIZED: 06/18/2013

FORMAT MANAGEMENT:

Paper: Retain in Office permanently after being microfilmed.

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in Office permanently.

Microfilm duplicate: Retain in State Archives permanently.

Microfilm duplicate: Retain in Regional Repository permanently.

APPRAISAL:

AGENCY: Carbon County School District (Utah)

SERIES: 25888

TITLE: School board minutes

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 3736

3

TITLE: School land applications register

DATES: 1894-

ARRANGEMENT: Alphanumerical

ANNUAL ACCUMULATION:

DESCRIPTION:

Minutes of open and closed committee and board meetings as required by UCA 52-4-203 (2014), et seq. "Written minutes shall be kept of all open meetings" UCA 52-4-203 (2013). May include agenda, meeting minutes, transcripts, and other supporting documentation.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SG 1, Item 59.

AUTHORIZED: 03/02/2015

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently with authority to weed.

APPRAISAL:

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 19028

3

TITLE: Transaction summary reports

DATES: 1990-

ARRANGEMENT:

ANNUAL ACCUMULATION:

DESCRIPTION:

This monthly computer report lists all the district's financial transactions. It provides year-to-date detail information for all individual postings for the general ledger. It includes date, item description, transaction type, posting date, purchase order or receipt number, check number, encumbrance, debit or credit, account balance, and vendor.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 24.

AUTHORIZED: 08/05/1997

FORMAT MANAGEMENT:

Computer output microfiche master: Retain in State Records Center for 4 years and then destroy.

APPRAISAL:

PRIMARY DESIGNATION:

Public

AGENCY: Carbon County School District (Utah)

SERIES: 15317

3

TITLE: Withdrawn student records

DATES: 1927-

ARRANGEMENT: Alphabetical by student surname, thereunder chronological by date of birth.

ANNUAL ACCUMULATION:

DESCRIPTION:

These are student cumulative files for students where records were neither transferred nor the student graduated. They were used to document the student's attendance. They contain the copies of achievement test scores, the official transcript, copies of report cards, health records, and immunization cards. The student may have dropped out of school and will later return.

RETENTION:

Retain 40 years

DISPOSITION:

Retain in agency custody.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 17, Item 32.

AUTHORIZED: 05/26/2015

FORMAT MANAGEMENT:

Paper: Retain in Office for 10 years and then transfer to State Records Center. Retain in State Records Center for 30 years and then transfer to State Archives.

Digital image: Retain in Office permanently.

APPRAISAL:

Administrative Historical

These records need to be maintained permanently because they include the official transcript which proof that an individual attended school.

AGENCY: Carbon County School District (Utah)

SERIES: 15317

TITLE: Withdrawn student records

(continued)

PRIMARY DESIGNATION:

Exempt 34 CFR 99

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 09/2017.