

# Retention and Classification Report

**Agency:** Board of Education. Office of Education. Evaluation and Assessment Section (2508)  
250 East 500 South  
Salt Lake City, UT 84111

**Records Officer:** Benjamin Rasmussen

12383	Budget books
12391	Core assessment correspondence log
12385	Core assessment test forms
12388	Executive correspondence
12384	Leave request files
12386	*Personnel files
12390	State testing program correspondence log
12387	Travel and purchases accounting book

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment Section

**SERIES:** 12383

3

**TITLE:** Budget books

**DATES:** 1976-

**ARRANGEMENT:** Chronological by date of activity

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

The Division of Finance prepares reports on a monthly basis for each state agency. The reports for Evaluation and Assessment are sent both to Internal Accounting and directly to Evaluation and Assessment. These reports show the expenditures of the section on a line-item basis and include the Summary by division, series 83738, Summary by revenue, series 83737, and Summary by vendor, series 84008, reports which are also maintained by Internal Accounting.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 07-01-1990

**FORMAT MANAGEMENT:**

Paper copy: Retain in Office for 3 years after end of fiscal year and then destroy.

**APPRAISAL:**

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment Section

**SERIES:** 12391

3

**TITLE:** Core assessment correspondence log

**DATES:** 1987-

**ARRANGEMENT:** Reverse chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

This series is a compilation of the office copies of major communications to the school districts about the State Core Assessment Program. The records are maintained in a 3-ring binder and include memoranda and policy releases to the Utah school districts concerning the program. There is some overlap between this series and Executive correspondence, series 12388; however, neither series is completely inclusive of the other.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Policy and procedure records, GRS-1717.

**AUTHORIZED:** 02-01-2015

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then transfer to State Archives with authority to weed.

Paper copy: Retain in Office until administrative need ends and then destroy.

**APPRAISAL:**

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment  
Section

**SERIES:** 12391

**TITLE:** Core assessment correspondence log

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment Section

**SERIES:** 12385

4

**TITLE:** Core assessment test forms

**DATES:** 1987-

**ARRANGEMENT:** Grouped by subjects which are in no particular order

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

Test questions and answer sheets for criterion-referenced tests administered annually in the spring to all students to evaluate their mastery of the material specified in the standards for the Utah core curriculum, as begun by the State of Utah in 1987.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series were specifically approved by the State Records Committee.

**APPROVED:** 04/1995

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 10 years and then transfer to State Archives with authority to weed.

Paper copy: Retain in Office for 10 years and then destroy.

**APPRAISAL:**

These records have historical value(s).

This disposition is based on the informational value the records hold for researchers interested in educational testing.

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment  
Section

**SERIES:** 12385

**TITLE:** Core assessment test forms

(continued)

**PRIMARY DESIGNATION:**

Protected UCA 63G-2-305(4) (2008)

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment  
Section

**SERIES:** 12388

3

**TITLE:** Executive correspondence

**DATES:** 1989-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.50 cubic feet.

**DESCRIPTION:**

These records contain the correspondence of the head of Evaluation and Assessment and may include information on the activities, policies, and accomplishments of the section.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 05-01-2014

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then transfer to State Archives with authority to weed.

**APPRAISAL:**

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment  
Section

**SERIES:** 12384

3

**TITLE:** Leave request files

**DATES:** 1993-

**ARRANGEMENT:** Alphabetical by employee surname.

**ANNUAL ACCUMULATION:** 0.10 cubic feet.

**DESCRIPTION:**

In 1993, the State of Utah adopted new payroll bookkeeping procedures which eliminated the old leave request forms. This record series was initiated in order to maintain a record, for administrative purposes, of leave requests within Evaluation and Assessment. The requests for leave show the name of applicant, dates or hours requested, and indicate the director's approval or disapproval.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Timekeeping records, GRS-1902.

**AUTHORIZED:** 07-01-2015

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative, and/or fiscal value(s).

**PRIMARY DESIGNATION:**

Private UCA 3-2-302(2)(d) (2008)

**REVIEW AND UPDATE STATUS:**

This report was reviewed and updated on 07/2015.



**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment Section

**SERIES:** 12386

3

**TITLE:** Personnel files

**DATES:** 1976-1995.

**ARRANGEMENT:** Alphabetical by employee surname

**DESCRIPTION:**

Evaluation and Assessment maintains its own copy of certain personnel information concerning its employees. This information includes performance evaluations, notices of grade or step changes, and letters. Complete personnel records are maintained by Human Resource Management.

**RETENTION:**

Retain for 3 year(s) after separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 06-01-2017

**FORMAT MANAGEMENT:**

Paper copy: Retain in Office until administrative need ends and then destroy.

**APPRAISAL:**

**PRIMARY DESIGNATION:**

Private UCA 63G-2-302(2)(a) (2008)

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment Section

**SERIES:** 12390

3

**TITLE:** State testing program correspondence log

**DATES:** 1990-

**ARRANGEMENT:** Reverse chronological

**ANNUAL ACCUMULATION:** 0.30 cubic feet.

**DESCRIPTION:**

This series is a compilation of the office copies of major communications to the school districts about the State Testing Program. The records are maintained in a 3-ring binder and include memoranda and policy releases to the Utah school districts concerning the program. There is some overlap between this series and Executive correspondence, series 12388; however, neither series is completely inclusive of the other.

**RETENTION:**

Retain Permanently

**DISPOSITION:**

Permanent. Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**AUTHORIZED:** 05-01-2014

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 5 years and then transfer to State Archives with authority to weed.

Paper copy: Retain in Office until administrative need ends and then destroy.

**APPRAISAL:**

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment  
Section

**SERIES:** 12390

**TITLE:** State testing program correspondence log

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Board of Education. Office of Education. Evaluation and Assessment Section

**SERIES:** 12387

3

**TITLE:** Travel and purchases accounting book

**DATES:** 1990-

**ARRANGEMENT:** Alphabetical by activity type, thereunder reverse chronological

**ANNUAL ACCUMULATION:** 0.20 cubic feet.

**DESCRIPTION:**

These records are a compilation of most of the accounting records maintained directly in Evaluation and Assessment. They include travel requests and reimbursements, communication from Accounting, and documentation of the purchasing activities of Evaluation and Assessment. Purchases may be for supplies or for workshops and conferences attended by section employees. These records are accumulated in 3-ring binders during the fiscal year and transferred to file folders at the conclusion of the fiscal year. Included are Request for approval of trip forms (DF-5) and Purchase authorization forms (C-8).

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

These records are in Archives' permanent custody.

**APPROVED:** 07/1990

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

**PRIMARY DESIGNATION:**

Public