Retention and Classification Report

Agency: North Davis Preparatory Academy (Utah) (3448)

1765 West Hill Field Road
Layton, UT 84041
801-547-1809

Records Officer Emily Bejarano

27700	Accounts payable
28339	Accounts receivable
28323	Admin Asst Office Payroll/Purchasing/School Records
28144	Employee records
28338	Payroll register
28461	Personnel Records
28463	Purchasing records
27778	Student cumulative files

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 27700 3
TITLE: Accounts payable
DATES: 2004-
ARRANGEMENT: Numerical by check number
ANNUAL ACCUMULATION: 2.00 cubic feet.
DESCRIPTION:

These records are used to pay school bills. They include copies of checks, invoices, purchase orders, and receiving reports. Correspondence with vendors and computer printouts may also be included.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1996.

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

APPRAISAL:

Fiscal

This disposition is based on Utah School Districts General Retention Schedule, Schedule 5, Item 1.

This retention is based on (UCA 70A-2-725 (1998)), which specifies a four-year statute of limitations in contracts for sale.

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 27700
TITLE: Accounts payable

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28339 3
TITLE: Accounts receivable
DATES: 2004-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION:
DESCRIPTION:

These are records of payments received by North Davis Preparatory from students and corporate donors. The records are used to document payment of school fees, extracurricular fees, and donations to travel abroad program. The records include total amount paid and name of payee.

RETENTION:

Retain 7 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1996.

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

APPRAISAL:

Administrative Fiscal
This disposition is based on Utah School Districts General Retention Schedule, Schedule 5, Item 2.

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28339
TITLE: Accounts receivable

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28323 3
TITLE: Admin Asst Office Payroll/Purchasing/School Records
DATES: 2011-
ARRANGEMENT: Chronological by year
ANNUAL ACCUMULATION:
DESCRIPTION:

These are the Elementary Administrative Assistant records. They include office accounting, purchase order records, inventory records, packing slips and payroll records.

RETENTION:

Retain 4 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1999.

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:

Fiscal
This disposition is based on Utah School Districts General Retention Schedule, Schedule 19, Item 36.

PRIMARY CLASSIFICATION:

Public 63G-2-301 (2)

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28144 3
TITLE: Employee records
DATES: 2005-
ARRANGEMENT: alphabetic
ANNUAL ACCUMULATION:
DESCRIPTION:

These are the personnel files for all school employees. They are used to document employment. The files include the employment applications, authorizations for hire forms, placement records, employee history card, copies of school transcripts, pay and leave history, work performance, in-service training completion certificates and credits, evaluation records, teaching certificates, previous teaching experience, contracts, lane change requests, and related correspondence. May also include fingerprints and verification of the criminal background check.

RETENTION:

Retain 65 years

DISPOSITION:
Destroy.

STATE RECORDS COMMITTEE STATUS:
This retention was approved by the State Records Committee on 07/01/2004.

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 62 years and then destroy.

APPRAISAL:
Administrative
This disposition is based on Utah School Districts General Retention Schedule, Schedule 14, Item 1.

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28338 3
TITLE: Payroll register
DATES: 2004-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION:
DESCRIPTION:

These records include payroll timesheets, and personal time off (PTO) history for all employees of North Davis Preparatory Academy. The records include the name of the employee, hours worked, number of approved worked hours, social security number, and when applicable, name of substitute teacher and date substitute worked. They are used to document work hours of North Davis Preparatory Academy.

RETENTION:

Retain 65 years

DISPOSITION:
Destroy.

STATE RECORDS COMMITTEE STATUS:
This retention was approved by the State Records Committee on 03/01/2003.

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 64 years and then destroy.

APPRAISAL:
Administrative Fiscal
This disposition is based on Utah School Districts General Retention Schedule, Schedule 6, Item 18.

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28338
TITLE: Payroll register

(continued)

PRIMARY CLASSIFICATION:

Private	63G-2-302(1)(f)

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28461 3
TITLE: Personnel Records
DATES: 2004-
ARRANGEMENT: Alphabetical by employee's surname
ANNUAL ACCUMULATION:
DESCRIPTION:

These are the personnel files for all certified district employees. They are used to document employment. The files include the employment applications, authorizations for hire forms, placement records, employee history card, copies of school transcripts, pay and leave history, work performance, in-service training completion certificates and credits, evaluation records, teaching certificates, previous teaching experience, contracts, lane change requests, and related correspondence. May also include fingerprints and verification of the criminal background check.

RETENTION:

Retain 65 years after date of employment or 3 years after retirement or death

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 07/01/2004.

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.

All Formats: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 62 years after date of employment or until 3 years after retirement or death and then destroy.

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28461
TITLE: Personnel Records

(continued)

APPRAISAL:
Administrative
This disposition is based on Utah School Districts General Retention Schedule, Schedule 14, Item 1.

PRIMARY CLASSIFICATION:
Private

SECONDARY CLASSIFICATION(S):
Public

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28463 3
TITLE: Purchasing records
DATES: 2009-
ARRANGEMENT: Chronological by purchase order number

ANNUAL ACCUMULATION:
DESCRIPTION:

These are forms authorizing the order to purchase supplies or equipment by the school district. They contain the name of requesting agency, name of vendor, item, date ordered, delivery date, purchase order number, account charged, and authorizing signature.

RETENTION:

Retain 4 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 08/01/1996.

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 2 years after end of fiscal year and then transfer to State Records Center. Retain in State Records Center for 2 years after end of fiscal year and then destroy.

APPRAISAL:

Fiscal
This disposition is based on Utah School Districts General Retention Schedule, Schedule 7, Item 7.

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 28463
TITLE: Purchasing records

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 27778 3
TITLE: Student cumulative files
DATES: 2004-
ARRANGEMENT: chronological, thereunder alphabetical

ANNUAL ACCUMULATION: 5.00 cubic feet.
DESCRIPTION:

These student files contain information on students attending school. They are used to document student's attendance. They contain the copies of achievement test scores, the official transcript, copies of report cards, health records, and immunization cards. They are also called Student cumulative cards.

RETENTION:

Retain 15 years

DISPOSITION:
Destroy.

STATE RECORDS COMMITTEE STATUS:
This retention was approved by the State Records Committee on 10/01/1998.

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 3 years and then transfer to State Records Center. Retain in State Records Center for 12 years and then destroy.

APPRAISAL:
Administrative
This disposition is based on Utah School Districts General Retention Schedule, Schedule 17, Item 2.

AGENCY: North Davis Preparatory Academy (Utah)

SERIES: 27778
TITLE: Student cumulative files

(continued)

PRIMARY CLASSIFICATION:
Private