Retention and Classification Report

Agency: Summit Academy (Utah) (3469)

1285 East 13200 South
Draper, UT 84020
801-572-4166

Records Officer

27517	Accounts payable
28531	Bank financial records
28534	Bond statements
28532	Certified personnel files
28533	Daily meals records
27518	General ledger
27955	Student files
27519	Time sheets

AGENCY: Summit Academy (Utah)

SERIES: 27517 3
TITLE: Accounts payable
DATES: 2004-
ARRANGEMENT: chronological by year thereunder alphabetical by account name
ANNUAL ACCUMULATION: 2.00 cubic feet.
DESCRIPTION:

These records are used to pay school district bills. They include copies of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts.

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: 09/13/2010

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
Records in this series have short-term fiscal value and may be destroyed according to the approved retention schedule. The general schedule cites UCA 70A-2-725 (1995) which says that legal actions for breach of contract must be commenced within four years.

AGENCY: Summit Academy (Utah)

SERIES: 27517
TITLE: Accounts payable

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Summit Academy (Utah)

SERIES: 28531 3
TITLE: Bank financial records
DATES: 2005-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION:
DESCRIPTION:

These are monthly statements showing all activity connected with the agency's financial account. Includes date, name of bank, deposits, withdrawals, cash balance, interest, and other such transactions. Used in day-to-day maintenance of agency finances, as well as for special reports, as needed.

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 6.

AUTHORIZED: 06/19/2014

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:

Administrative Fiscal Legal

AGENCY: Summit Academy (Utah)

SERIES: 28531
TITLE: Bank financial records

(continued)

PRIMARY CLASSIFICATION:
Public UC 63G-2-301

AGENCY: Summit Academy (Utah)

SERIES: 28534 3
TITLE: Bond statements
DATES: 2007-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION:
DESCRIPTION:

These notes document the borrowing of money by local school boards in anticipation "of the collection of taxes or other revenue of the school district as long as it complies with the Title 11, Chapter 14, Local Government Bonding Act" (UC 53A-18-101 (2005)).

RETENTION:

Retain 1 year.

DISPOSITION:
Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:
Retention and disposition for this series is authorized by Archives general schedule SD 2, Item 7.

AUTHORIZED: 06/19/2014

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 destroy.

APPRAISAL:

Administrative

AGENCY: Summit Academy (Utah)

SERIES: 28534
TITLE: Bond statements

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Summit Academy (Utah)

SERIES: 28532 3
TITLE: Certified personnel files
DATES: 2009-
ARRANGEMENT: Alphabetical by 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 employment or 3 years after retirement or death, whichever comes first (UC 49-11-601 (2013)).

DISPOSITION:
Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:
Retention and disposition for this series is authorized by Archives general schedule 94, Item 1.

AUTHORIZED: 06/19/2014

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 date of employment and then transfer to State Records Center. Retain in State Records Center for 63 years and then destroy.

AGENCY: Summit Academy (Utah)

SERIES: 28532
TITLE: Certified personnel files

(continued)

APPRAISAL:

Administrative Legal

PRIMARY CLASSIFICATION:
Private UC 63G-2-302(1)(g)

SECONDARY CLASSIFICATION(S):
Public. UC 63G-2-301

AGENCY: Summit Academy (Utah)

SERIES: 28533 3
TITLE: Daily meals records
DATES: 2009-
ARRANGEMENT: Chronological
ANNUAL ACCUMULATION:
DESCRIPTION:

These records track all aspects of the school lunches served. They contain reports of a la carte items, milk and meals served, and sales of lunches by category (free, reduced, paid, adult). The records are computed on a daily basis, are used as a gauge for future planning, and are referenced as needed.

RETENTION:

Retain 3 years.

DISPOSITION:
Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:
Retention and disposition for this series is authorized by Archives general schedule SD 19, Item 26.

AUTHORIZED: 06/19/2014

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 2 years and then destroy.

APPRAISAL:

Administrative

AGENCY: Summit Academy (Utah)

SERIES: 28533
TITLE: Daily meals records

(continued)

PRIMARY CLASSIFICATION:
Public UC 63G-2-301

AGENCY: Summit Academy (Utah)

SERIES: 27518 3
TITLE: General ledger
DATES: 2004-
ARRANGEMENT: chronological by date of entry
ANNUAL ACCUMULATION: 0.20 cubic feet.
DESCRIPTION:

These are summaries showing receipts and disbursements of each department or school. May also include documentation from subsidiary ledgers to general ledger and accounting adjustments in the form of general entries.

RETENTION:

Retain 10 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 5, Item 14.

AUTHORIZED: 09/15/2010

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 8 years and then destroy.

APPRAISAL:

Fiscal
Records in this series have short-term fiscal value. These records may be destroyed according to the established retention schedule.

AGENCY: Summit Academy (Utah)

SERIES: 27518
TITLE: General ledger

(continued)

PRIMARY CLASSIFICATION:
Public

AGENCY: Summit Academy (Utah)

SERIES: 27955 3
TITLE: Student files
DATES: August 2004-
ARRANGEMENT: alphabetical by student's last name
ANNUAL ACCUMULATION: 0.50 cubic feet.
DESCRIPTION:

These are student cumulative files for students whose records were not transferred but no longer attend this school. They were used to document the student's attendance. They include test scores, immunization record, eye testing, and all pertinent information on the student. These student files are commonly known as "dead files."

RETENTION:

Retain 15 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 17, Item 23.

AUTHORIZED: 06/25/2012

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
The general retention schedule requires that these records be retained three years after graduation.

AGENCY: Summit Academy (Utah)

SERIES: 27955
TITLE: Student files

(continued)

PRIMARY CLASSIFICATION:
Exempt FERPA

AGENCY: Summit Academy (Utah)

SERIES: 27519 3
TITLE: Time sheets
DATES: 2004-
ARRANGEMENT: chronological by date thereunder alphabetical by employee surname
ANNUAL ACCUMULATION: 0.50 cubic feet.
DESCRIPTION:

These are records which verify hours worked (regular and overtime), leave earned (vacation, sick, emergency, conference/professional) and taken by school district employees.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule SD 6, Item 24.

AUTHORIZED: 09/15/2010

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 2 years and then destroy.

APPRAISAL:

Fiscal
Records in this series have short-term fiscal value and may be destroyed according to the established retention schedule.

AGENCY: Summit Academy (Utah)

SERIES: 27519
TITLE: Time sheets

(continued)

PRIMARY CLASSIFICATION:
Public

SECONDARY CLASSIFICATION(S):
Private. UCA 63-3-302 (1)(e) (2008)