

Retention and Classification Report



Agency: Alpine School District (Utah) (41)

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06316 Balance sheet report
06320 Bank reconciliation reports
20089 Certified personnel disciplinary files
20090 Classified personnel disciplinary files
20088 Classified personnel files
15316 Driver's education student time cards
15315 Driver's training and student time cards
20087 Educators' personnel files
26506 Employee W-2s
13232 Employee absence and leave report
04192 Employee account distribution report
06319 Employee check detail listing report
04216 Employee salary breakdown report
04225 Function object report
06318 Function summary report
04183 General ledgers
27268 Hourly terminations
04185 Invoice report
26513 Mini-run Proforma reports
06317 Object report
22052 Official transcripts
26508 Payroll Check Register
06206 Payroll check history report
04224 Program object report
04214 Quarterly payroll report
06566 School board minutes
21779 Special education student files
13113 State Developmental Center academic records
13115 State Developmental Center student attendance rolls
04190 State and federal tax withholding report

14798 Student attendance class rolls
14799 Student cumulative record
04179 Transaction journal report
26505 Year-end reports

AGENCY: Alpine School District (Utah)

SERIES: 6316

3

TITLE: Balance sheet report

DATES: 1980-

ARRANGEMENT: Numerical by account number

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This annual computer report is created by the Accounting Department to show the financial position of the district for preparation of the annual financial reports. This report includes the balance sheet, name and account number of assets, liabilities, amounts sorted by fund, and beginning and ending balances. In 1991, the report was also placed on computer output microfiche.

RETENTION:

Retain 10 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 10 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the district's business official.

AGENCY: Alpine School District (Utah)

SERIES: 6320

3

TITLE: Bank reconciliation reports

VARIANT O/K CK list and bank edit list

DATES: 1984-

ARRANGEMENT: Numerical by check type code

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This monthly computer report is created by the Accounting Department to balance the district's bank accounts. The bank reconciliation report has two sections: the outstanding check list and the monthly edit listing. The bank edit portion of the report serves as a record of the checks that have cleared during the month and lists reconciliation adjustments. The outstanding check list includes the check number, check type, check date, check amount, and vendor number or pay check social security number. The bank edit includes the checks that have cleared by check type, number, amount, and any reconciliation items. In 1991, the report was placed on computer output microfiche and the paper report was discontinued.

RETENTION:

Retain 3 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: For records beginning in 1984 through 1991. Retain in Office for 3 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 3 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 3 years and then destroy.

AGENCY: Alpine School District (Utah)

SERIES: 6320

TITLE: Bank reconciliation reports

(continued)

APPRAISAL:

Administrative Fiscal

This disposition is based on the administrative and fiscal needs expressed by the Accounting Director. The report has no value after it has been audited.

PRIMARY CLASSIFICATION:

Public

AGENCY: Alpine School District (Utah)

SERIES: 20089

3

TITLE: Certified personnel disciplinary files

VARIANT Classified side files

DATES: 1988-

ARRANGEMENT: Alphabetical by employee name

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

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after terminated and then transfer to State Records Center. Retain in State Records Center for 62 years and then destroy.

APPRAISAL:

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

AGENCY: Alpine School District (Utah)

SERIES: 20089

TITLE: Certified personnel disciplinary files

(continued)

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

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

AGENCY: Alpine School District (Utah)

SERIES: 20090

3

TITLE: Classified personnel disciplinary files

VARIANT: Classified side files

DATES: 1986-

ARRANGEMENT: Alphabetical by employee name

ANNUAL ACCUMULATION:

DESCRIPTION:

These are the personnel files for all classified district employees that have been terminated by the district. 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.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after terminated and then transfer to State Records Center. Retain in State Records Center for 62 years and then destroy.

APPRAISAL:

This disposition is based on Utah School Districts General Retention Schedule, Schedule 14, Item 2.

PRIMARY CLASSIFICATION:

Private

AGENCY: Alpine School District (Utah)

SERIES: 20090

TITLE: Classified personnel disciplinary files

(continued)

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-201(1)(b)

AGENCY: Alpine School District (Utah)

SERIES: 20088

3

TITLE: Classified personnel files

DATES: ca. 1970-

ARRANGEMENT: Alphabetical by employee name

ANNUAL ACCUMULATION:

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.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years after termination and then transfer to State Records Center. Retain in State Records Center for 60 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on Utah School Districts General Retention Schedule, Schedule 14, Item 2.

The history of a person's employment must be retained beyond the time he or she could potentially claim retirement benefits based on employment.

AGENCY: Alpine School District (Utah)

SERIES: 20088

TITLE: Classified personnel files

(continued)

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Public. UCA 63G-2-201(1)(b)

AGENCY: Alpine School District (Utah)

SERIES: 15316

4

TITLE: Driver's education student time cards

DATES: 1970-1985

ARRANGEMENT: Alphabetical by name

ANNUAL ACCUMULATION:

DESCRIPTION:

Time cards document student participation and final results of driver's education classes which allow students successfully completing the course to obtain a driver's license.

The card includes student number, name, and address, name of parent or guardian, date and place of birth, sex, school, grade, record of grades, hours of driver's education, instructor's initials, whether course was successfully completed, eye examination results, hearing test results, record of medical conditions that could affect driving, driving maneuvers, road driving, and final rating.

RETENTION:

Retain 4 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

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

APPRAISAL:

Administrative

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

PRIMARY CLASSIFICATION:

Exempt 34 CFR 99

AGENCY: Alpine School District (Utah)

SERIES: 15315

3

TITLE: Driver's training and student time cards

DATES: 1969-1971

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

Weekly activity report submitted to the school principal documenting activities of driver's education students. The report includes time (indication whether morning or afternoon), student's name, amount of driving and observing time, driver's signature, principal's signature, total hours, and date.

RETENTION:

Retain Retain for 4 years and then destroy.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

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

APPRAISAL:

Administrative

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

PRIMARY CLASSIFICATION:

Public

AGENCY: Alpine School District (Utah)

SERIES: 20087

3

TITLE: Educators' personnel files

DATES: ca. 1950-

ARRANGEMENT: Alphabetical by educator's names

ANNUAL ACCUMULATION:

DESCRIPTION:

These are the personnel files for all district educators (teachers and administrators). 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:

Paper: Retain in Office for 10 years after terminated and then transfer to State Records Center. Retain in State Records Center for 55 years and then destroy.

APPRAISAL:

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

PRIMARY CLASSIFICATION:

Private

AGENCY: Alpine School District (Utah)

SERIES: 20087

TITLE: Educators' personnel files

(continued)

SECONDARY CLASSIFICATION(S):

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

AGENCY: Alpine School District (Utah)

SERIES: 13232

3

TITLE: Employee absence and leave report

DATES: 1984-

ARRANGEMENT: Alphabetical by employee surname

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

This annual computer report documents all school district employee absences including sick leave, personal, military, vacation and compensatory time. It is compiled at the end of each fiscal year by the Data Processing Department. The report includes social security number, name, job description, job code, beginning balance, and used and ending balances of absences. This report is also sorted by employee type (i.e., certified, classified, administrative).

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1994.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then destroy.

Computer data files: Retain in Office for 1 year and then dump to computer output microfiche.

Computer output microfiche master: Retain in Office for 3 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 3 years.

APPRAISAL:

Administrative

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

AGENCY: Alpine School District (Utah)

SERIES: 13232

TITLE: Employee absence and leave report

(continued)

PRIMARY CLASSIFICATION:

Public

SECONDARY CLASSIFICATION(S):

Private. social security number

AGENCY: Alpine School District (Utah)

SERIES: 4192

3

TITLE: Employee account distribution report

VARIANT: Account distribution by employee

DATES: 1986-

ARRANGEMENT: Alphabetical by employee name

ANNUAL ACCUMULATION: 6.00 cubic feet.

DESCRIPTION:

This is a monthly computer report created as part of the payroll process. It is used to correct payroll accounting errors and to record journal entry corrections. The report includes the employee account number distributions, employee name, social security number, and amounts. In 1991, the report was placed on computer output microfiche and the paper copy was discontinued.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: For records beginning in 1986 through 1991. Retain in Office for 3 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 3 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

This disposition is based on the administrative and fiscal needs expressed by the business official. The report has no value after it has been audited.

PRIMARY CLASSIFICATION:

Private

AGENCY: Alpine School District (Utah)

SERIES: 6319

3

TITLE: Employee check detail listing report

DATES: 1991-

ARRANGEMENT: Alphabetical by location

ANNUAL ACCUMULATION: 24.00 fiche.

DESCRIPTION:

This computer report is created by the Payroll Department as part of the monthly check run. It is used to verify attendance and detail payroll information. This report contains all information on a pay check including name, social security number, job code, pay code, calendar and fiscal year-to-date payment history, deductions, net check amount, and attendance.

RETENTION:

Retain 3 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Computer output microfiche master: Retain in State Records Center for 3 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 3 years and then destroy.

APPRAISAL:

Administrative Fiscal

This disposition is based on the administrative and financial needs expressed by the business official. The record has no value after it has been audited.

AGENCY: Alpine School District (Utah)

SERIES: 6319

TITLE: Employee check detail listing report

(continued)

PRIMARY CLASSIFICATION:

Private

AGENCY: Alpine School District (Utah)

SERIES: 4216

3

TITLE: Employee salary breakdown report

DATES: 1987-

ARRANGEMENT: Alphabetical by employee name

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

This computer report is created semi-annually by the Data Processing Department at the end of the calendar and fiscal years. It is used to confirm W-2 deductions and provides a detail listing of the fiscal year-to-date earnings. The report includes name, social security number, earnings by job code for fiscal and calendar year with summary totals for fiscal and calendar year. In 1991, the report placed on computer output microfiche.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then destroy.

Computer output microfiche master: Retain in State Records Center for 53 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 53 years and then destroy.

APPRAISAL:

Administrative

This retention is based on the administrative needs expressed by the district's business official. Since the district does not have a separate Employee Payroll History, this report has been determined to be their official record of employee payroll for retirement purposes.

PRIMARY CLASSIFICATION:

Private

AGENCY: Alpine School District (Utah)

SERIES: 26506

3

TITLE: Employee W-2s

DATES: 1963-

ARRANGEMENT: Chronologically by year and thereunder alphabetically by surname.

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These wage and tax statements are annual records on individual employee's gross earnings, federal taxes, state taxes, social security wages, and medicare wages.

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:

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
This disposition is based on Utah School Districts General Retention Schedule, Schedule 14, Item 2.

AGENCY: Alpine School District (Utah)

SERIES: 4225

3

TITLE: Function object report

DATES: 1984-

ARRANGEMENT: Numerical by function account number

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

This computer report is created by the the Accounting Department to show the costs of district operations by function. It is used as an evaluation tool. The report includes the function account number and name sorted by fund. The year-to-date summary account balances are compared to budget with encumbrances and remaining budget listed. In 1991, the report was placed on computer output microfiche.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 10 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the district's business official. It is used with the general ledger to provide clearer picture of the district's financial condition.

AGENCY: Alpine School District (Utah)

SERIES: 6318

3

TITLE: Function summary report

DATES: 1985-

ARRANGEMENT: Numerical by fund number, thereunder numerical by function code

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

This annual computer report is created by the Accounting Department to show the results of operations of the maintenance and operation fund functions in order to prepare annual financial reports. The report includes the summarized data by object and is grouped by category. The report includes year-to-date summary account balances which are compared to budget with encumbrances and remaining budget listed. In 1991, the report was also placed on computer output microfilm.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 10 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the district's accounting director. It is used with the General ledger (Series 4183) to provide clearer picture of the district's financial condition.

AGENCY: Alpine School District (Utah)

SERIES: 4183

3

TITLE: General ledgers

DATES: 1906-

ARRANGEMENT: Numerical by account number

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

This annual computer report is created by the Accounting Department to provide detail on all district financial transactions that are not summarized in the monthly transaction journals. The report lists receipts, expenditures, outstanding encumbrances, and remaining budget. This report includes journal number, date, reference number, account numbers, transaction amount, running account balance date by date, vendor or employee number. Prior to 1984, this report was a handwritten account of all district financial transactions. In 1991, the report was placed on computer output microfiche and the paper copy was discontinued.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: For records beginning in 1906 through 1991. Retain in Office for 15 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 15 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 15 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the Accounting Director.

AGENCY: Alpine School District (Utah)

SERIES: 27268

3

TITLE: Hourly terminations

DATES: 1999-

ARRANGEMENT: Chronological by month and thereunder alphabetical by surname.

ANNUAL ACCUMULATION:

DESCRIPTION:

Hourly terminations are created to identify when employees terminate employment. Information in them includes employees' names and Social Security numbers, job title, school or work unit, and date of termination.

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:

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
This disposition is based on Utah School Districts General Retention Schedule, Schedule 14, Item 2.

AGENCY: Alpine School District (Utah)

SERIES: 4185

3

TITLE: Invoice report

VARIANT: Paid/unpaid invoice listing

DATES: 1985-

ARRANGEMENT: Numerical by invoice number

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

This computer report is created by the Accounts Payable Department to track the payment histories of vendors after the information is down loaded from the main frame computer system. The report includes the vendor name, vendor number, invoice number, check number, check date, and check amount.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then destroy provided provided information placed on COM.

Computer output microfiche master: Retain in State Records Center for 5 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 5 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the district's Accounting Director.

AGENCY: Alpine School District (Utah)

SERIES: 26513

3

TITLE: Mini-run Proforma reports

VARIANT: Monthly clean-up payroll runs

DATES: 2001-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION:

DESCRIPTION:

The mini-run proforma is a report kept by the payroll department which includes monthly payroll information for those not paid in the regular payroll and to correct mistakes made in the regular payroll. The report includes payment details for each recipient, such as social security number, name, marital status, exemptions, location code, check date, gross pay, deduction information, and net amount.

RETENTION:

Retain 7 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/2003.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

APPRAISAL:

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

AGENCY: Alpine School District (Utah)

SERIES: 6317

3

TITLE: Object report

DATES: 1984-

ARRANGEMENT: Numerical by object account number

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

This annual computer report is created by the Accounting Department to show the results of operations by account for object code accounting. This report is used to evaluate financial operations by object code indicating the type of instruction or supplies. This report includes the object code name and account number sorted by fund, year-to-date summary account balances are compared to budget with encumbrances and remaining budget. In 1991, this report was also placed on computer output microfiche.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 10 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the accounting director.

AGENCY: Alpine School District (Utah)

SERIES: 22052

3

TITLE: Official transcripts

DATES: 1995-

ARRANGEMENT: Chronological by graduation year, thereunder alphabetical by high school name and student surname

ANNUAL ACCUMULATION:

DESCRIPTION:

These are the official record of school attendance and high school graduation from Alpine School District's seven high schools (American Fork, Lehi, Lone Peak, Mountain View, Timpanogas, Orem, and Pleasant Grove High Schools) and their one alternative school (Alpine Life and Learning Center). They are used to document graduation from high school and to verify classes attended and credits earned. They are used also for college admission and employment purposes. This information is maintained on-line until student graduates and beginning in 1998 is dumped to computer output microfiche annually for the previous school year in July. The microfiche include student's name, address, birthdate, student number, parents'/guardians' names, last school attended, graduation date (if any), classes, credits earned, and grades for seventh through twelfth grades, and test scores. Microfiche also includes official transcripts for some schools prior to 1998 (Alpine Life and Learning Center from 1995; Timpanogas High from 1996; and Lone Peak from 1997). Prior to 1995, official transcripts were retained separately by the seven high schools and were regularly microfilmed.

RETENTION:

Retain permanently.

DISPOSITION:

Retain in agency custody.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 10/01/1998.

FORMAT MANAGEMENT:

Computer data files: Retain in Office for 1 year after graduation from high school and then microfilm and delete provided microfilm has passed inspection.

Computer output microfiche master: Retain in State Archives permanently with authority to weed.

AGENCY: Alpine School District (Utah)

SERIES: 22052

TITLE: Official transcripts

(continued)

Computer output microfiche duplicate: Retain in Office permanently.

APPRAISAL:

This disposition is based on Utah School Districts General Retention Schedule, Schedule 17, Item 3.

PRIMARY CLASSIFICATION:

Exempt 34 CFR 99

AGENCY: Alpine School District (Utah)

SERIES: 26508

3

TITLE: Payroll Check Register

VARIANT: Fiscal year Check Register

DATES: 1999-

ARRANGEMENT: Alphabetical by employee name

ANNUAL ACCUMULATION:

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.

RETENTION:

Retain 7 years

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/2003.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

APPRAISAL:

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

AGENCY: Alpine School District (Utah)

SERIES: 6206

3

TITLE: Payroll check history report

VARIANT: Check history of former employees

DATES: 1986-

ARRANGEMENT: Chronological, thereunder alphabetical by name

ANNUAL ACCUMULATION: 8.00 fiche.

DESCRIPTION:

This annual computer report is produced by the payroll department when terminated district employees are purged from the district's computer system. It is used to research payments made to former employees and for verification purposes. The report includes the social security number, name of employee, marital status, exemptions, location code, check date, check number, gross pay, deductions (federal and state taxes, FICA, retirement, insurance, other), net amount amount, assignments paid, and regular hourly rate.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Computer output microfiche master: Retain in State Records Center for 53 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 53 years and then destroy.

APPRAISAL:

Administrative Legal

This disposition is based on the administrative need expressed by the district business official. This report is the districts only payroll history and is therefore maintained longer than the traditional 7 years. It is essential for retirement purposes.

AGENCY: Alpine School District (Utah)

SERIES: 4224

3

TITLE: Program object report

DATES: 1984-

ARRANGEMENT: Numerical by program account number

ANNUAL ACCUMULATION: 0.30 cubic feet.

DESCRIPTION:

This annual computer report is created by the Accounting Department to compare the financial transactions to goals, objectives, and performance requirements that relate specifically to an activity and course subdivision not satisfactorily described by the Function object report (series 4225). The report includes program name, accounting period, revenue and expenditure accounts with year to date account balance summaries that show the results of operations by programs by object code. In 1991, the report was placed on computer output microfilm and the paper report was discontinued.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: For records beginning in 1984 through 1991. Retain in Office for 10 years and then destroy.

Computer output microfiche master: Retain in State Records Center for 10 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative

This disposition is based on the administrative needs expressed by the accounting director.

AGENCY: Alpine School District (Utah)

SERIES: 4214

3

TITLE: Quarterly payroll report

VARIANT: QTRP

DATES: 1987-

ARRANGEMENT: Alphabetical by employee name

ANNUAL ACCUMULATION: 0.40 cubic feet.

DESCRIPTION:

This computer report is created by Payroll for use as a quick reference of calendar and fiscal year to date earnings by individual and for the District. The report includes social security number, name, wages earned in each quarter, calendar and year to date totals. In 1991, the report was also placed on computer output microfiche.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office until superseded and then destroy provided year end reports are retained for 3 years.

Computer output microfiche master: Retain in State Records Center until superseded and then destroy provided year end reports are retained for 3 years.

Computer output microfiche duplicate: Retain in Office until superseded and then destroy provided year end reports are retained for 3 years.

APPRAISAL:

Fiscal

This disposition is based on the fiscal needs expressed by the district's Accounting Director. This report has no value after it has been audited.

AGENCY: Alpine School District (Utah)

SERIES: 6566

3

TITLE: School board minutes

DATES: 1915-

ARRANGEMENT: Chronological

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.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 12/01/1997.

FORMAT MANAGEMENT:

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

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in Office permanently.

APPRAISAL:

This disposition is based on Utah School Districts General Retention Schedule, Schedule 15, Item 2.

PRIMARY CLASSIFICATION:

Public

AGENCY: Alpine School District (Utah)

SERIES: 21779

3

TITLE: Special education student files

VARIANT: Blue folders

DATES: 1973-

ARRANGEMENT: Chronological by student's birth year, thereunder alphabetical by student's surname

ANNUAL ACCUMULATION: 242.00 cubic feet.

DESCRIPTION:

These files document students enrolled in the district's special education programs in accordance with the provisions of 34 CFR 300.560-300.577 (1998). They are required to receive federal and state special education funding. Services can be discontinued when student is reclassified as no longer needing special education services, the student moves, or refuses the services. They contain various reports and completed forms including individual education program records (IEPs), inspection logs, evaluation and re-evaluation forms, parental approval forms, test protocols, parent surveys, parent information, third party information, placement documents, refusal of services forms, and other legal documents required by federal regulations and state rules to verify a student's disability and need for special education services.

RETENTION:

Retain 26 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 10/01/1998.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after graduation or services end and then transfer to State Records Center. Retain in State Records Center for 25 years and then destroy.

AGENCY: Alpine School District (Utah)

SERIES: 21779

TITLE: Special education student files

(continued)

APPRAISAL:

Administrative Legal

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

This disposition is based on the legal requirements specified in 34 CFR 300.562 (1998) and the recommendations of the State Office of Education. A student can receive special education services until the age of twenty-one.

PRIMARY CLASSIFICATION:

Exempt 34 CFR 300.562 (2008); 34 CFR 99 (2008)

AGENCY: Alpine School District (Utah)

SERIES: 4190

3

TITLE: State and federal tax withholding report

VARIANT W-2 listing report
Employee tax balances

DATES: 1985-

ARRANGEMENT: Numerical by social security number

ANNUAL ACCUMULATION: 0.60 cubic feet.

DESCRIPTION:

This quarterly computer report is created by the payroll department to meet federal and state wage reporting laws and to balance quarterly and annual wage reporting reports for the state and federal government. This report includes social security number, name, federal and state withholding amounts and respective taxable wage base amounts. In 1991, the report was also placed on computer output microfiche.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then destroy.

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:

Fiscal

This disposition is based on the fiscal needs expressed by the district's accounting director.

PRIMARY CLASSIFICATION:

Private

AGENCY: Alpine School District (Utah)

SERIES: 13113

3

TITLE: State Developmental Center academic records

DATES: 1985-

ARRANGEMENT: Alphabetical by student's surname

ANNUAL ACCUMULATION:

DESCRIPTION:

These student files are maintained to provide individual medical, family history, document attendance, gauge progress, and verify disability. In 1985, the Alpine School District began providing educational services to residents of the State Developmental Center. The Center provides educational services to severely mentally retarded and frequently emotionally handicapped children and adults who cannot be placed in group homes nor treated at home. All residents are placed at the Center by court order with half being wards of the State of Utah. Education is provided to students between the age of five and twenty-two for twenty-seven hours a week or two hours a week for homebound students. There are no grade levels and diplomas are not awarded. Classes are organized according to age and intellectual abilities. Certificates of completion are awarded. Goals are established for individual curriculum which are slightly above the student's level. The files include individual education program (IEP) forms, various testing results, behavior management charts, private data evaluations, and certificates.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1994.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after certificate awarded and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy provided no longer needed for educational purposes.

APPRAISAL:

Legal

This disposition is based on discussions with the State Office of Education, Services for at Risk Students Division and provisions of the 34 CFR 99 (1992).

AGENCY: Alpine School District (Utah)

SERIES: 13113

TITLE: State Developmental Center academic records

(continued)

PRIMARY CLASSIFICATION:

Private

SECONDARY CLASSIFICATION(S):

Controlled

AGENCY: Alpine School District (Utah)

SERIES: 13115

3

TITLE: State Developmental Center student attendance rolls

DATES: 1985-1994.

ARRANGEMENT: Chronological, alphabetical by teacher's name

ANNUAL ACCUMULATION:

DESCRIPTION:

These are the class rolls maintained by each teacher at the State Developmental Center. They are used to record student attendance. The rolls contain teacher's name, student's names, name of school and class, entry date, exit date, days absent, and handicapping code. During 1994, these records will be computerized.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1994.

FORMAT MANAGEMENT:

Paper: Retain in Office for 5 years and then destroy.

APPRAISAL:

Legal

This disposition is based on 34 CFR 99 (1992) and the recommendations of the Office of Education.

PRIMARY CLASSIFICATION:

Private

AGENCY: Alpine School District (Utah)

SERIES: 14798

4

TITLE: Student attendance class rolls

DATES: [ca. 1910]-

ARRANGEMENT: Chronological, thereunder alphabetical by school and teacher's name

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Rolls of various sizes maintained by elementary, intermediate, and high schools to record student attendance. Include school year, school, teacher's name, names of students, entry date, exit date, days attending school, days absent, and sometimes grades. Beginning in 1993, secondary attendance records were uploaded to the district computer to provide school-wide records of attendance.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1995.

FORMAT MANAGEMENT:

Paper: For records beginning in 1910 through 1939. Retain in Office for 5 years and then transfer to State Archives with authority to weed.

Paper: For records beginning in 1940 and continuing to the present. Retain in Office for 5 years and then destroy.

Computer magnetic storage media: Retain in Office for 5 years and then erase.

Computer data files: Retain in Office for 5 years and then delete.

APPRAISAL:

Administrative Historical

This disposition is based on the administrative needs of the district. The Alpine School District was created in 1915. All rollbooks existing prior to the district's organization were for individual city school districts and will be retained for historical purposes. Since it has been determined inadequate transcripts exist for many students between 1915-1939, the rolls for this period need to be retained permanently.

AGENCY: Alpine School District (Utah)

SERIES: 14798

TITLE: Student attendance class rolls

(continued)

PRIMARY CLASSIFICATION:

Exempt 34 CFR 99 (2008)

AGENCY: Alpine School District (Utah)

SERIES: 14799

4

TITLE: Student cumulative record

DATES: ca. 1923-

ARRANGEMENT: Alphabetical by student's surname

ANNUAL ACCUMULATION: 50.00 cubic feet.

DESCRIPTION:

These are the official transcripts, copies of achievement test scores, report cards and health records document student performance and are used for reference purposes. The transcript (Series 14800) is the permanent part of the student record and includes student's name, address, birthdate, parents' names, lists of high school classes and grades, graduation date, test scores, class ranking, grade point average, and social security number.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 06/01/1995.

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after scheduled or actual graduation and then destroy provided official transcript has been pulled and retained.

APPRAISAL:

Administrative

PRIMARY CLASSIFICATION:

Exempt 34 CFR 99 (2008)

AGENCY: Alpine School District (Utah)

SERIES: 4179

3

TITLE: Transaction journal report

VARIANT: Monthly transaction journal

DATES: 1984-

ARRANGEMENT: Chronological, thereunder numerical by account number

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

This is a monthly computer report of all district financial transactions providing detailed information on all individual postings to the general ledger. It is used for audit purposes. It includes date, item description, transaction type, posting date, purchase order or receipt number, check number, encumbrance, debit or credit, account balance, and vendor. In November 1990, the creation of a paper printout was discontinued and the report is being received on computer output microfilm.

RETENTION:

Retain 10 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

This retention was approved by the State Records Committee on 03/01/1991.

FORMAT MANAGEMENT:

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

Computer output microfiche master: Retain in State Records Center for 10 years and then destroy.

Computer output microfiche duplicate: Retain in Office for 10 years and then destroy.

APPRAISAL:

Administrative Fiscal

This disposition is based on the needs expressed by the office and previously approved in the School District's General Records Retention Schedule (1986).

AGENCY: Alpine School District (Utah)

SERIES: 4179

TITLE: Transaction journal report

(continued)

PRIMARY CLASSIFICATION:

Public

AGENCY: Alpine School District (Utah)

SERIES: 26505

3

TITLE: Year-end reports

DATES: 1983-

ARRANGEMENT: Chronological.

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

The accounting department generates year-end reports as an evaluation tool to determine whether or not expenditures are in line with budget plans. Function reports break down the cost of district operations by function. Object reports identify expenditures by the type of supplies or instruction. Program reports compare year-to-date financial transactions to budgets or projected expenditure goals. These reports are used in conjunction with general ledgers (series 4183) to provide a more detailed picture of the district's financial condition.

RETENTION:

Retain 15 years.

DISPOSITION:

Destroy.

STATE RECORDS COMMITTEE STATUS:

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

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 14 years and then destroy.

APPRAISAL:

Administrative Fiscal
This disposition is based on Utah School Districts General Retention Schedule, Schedule 5, Item 14.

PRIMARY CLASSIFICATION:

Public

AGENCY: Alpine School District (Utah)

SERIES: 26505

TITLE: Year-end reports

(continued)

SECONDARY CLASSIFICATION(S):

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