

Retention and Classification Report

Agency: Board of Regents (836)

60 South 400 West
Board of Regents Building Gateway
Salt Lake City, UT 84101-1284
801-321-7170

Records Officer: Dean Cox

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AGENCY: Board of Regents

SERIES: 12666

3

TITLE: Academic technical reference files

DATES: 1985-2015.

ARRANGEMENT: Alphabetical by subject/organization

DESCRIPTION:

These are documents retained strictly for reference and informational purposes which are not part of any other official files. They include copies of reports, studies, special compilations of data, drawings, periodicals, books, clippings, extra (non-record) copies of policy and procedure files, brochures, catalogs, vendor price lists, and publications prepared internally and externally.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12749

3

TITLE: Access Committee files

DATES: 1993-

ARRANGEMENT:

DESCRIPTION:

Records created by a committee or conference, including advisory committee's relating to executive establishment, organization, membership, and policy. Includes agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-01-2014

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Archives with authority to weed.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 9034

3

TITLE: Accounts distribution of personnel earnings

DATES: 1967-

ARRANGEMENT: Chronological

DESCRIPTION:

This is the personnel earning list by social security number.

RETENTION:

Retain Permanently

DISPOSITION:

Permanent. May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1976

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years after being microfilmed and then microfilm.

Microfilm master: Retain in Office permanently.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(h)(2008)

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 11577

3

TITLE: Administrative records

DATES: 1958-1977.

ARRANGEMENT: None

DESCRIPTION:

This series contains reports, memos, budget requests, history, policies, etc.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

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

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have administrative value(s).

Disposition based on value of records in documenting Board's achievements, policies, programs and functions over a 20 year period.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 19531

3

TITLE: Annual reports

DATES: 1959-

ARRANGEMENT: Chronological

DESCRIPTION:

The annual report of the Board of Regents contains information pertaining to academic affairs, budgets, finance, planning, capital facilities and profiles of member institutions. These reports serve as the official report of the activities for the preceding year. The reports contain information pertaining to planning, programs, policies, coordination with other state agencies, Western Interstate Commission for Higher Education (WICHE), federally funded activities and special activities.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have historical value(s).
The annual reports document this history and functions of the agency.

AGENCY: Board of Regents

SERIES: 19531

TITLE: Annual reports

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 11976

3

TITLE: Audit review subcommittee agenda

DATES: 1978-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

Records created by a committee or conference, including advisory committee's relating to executive establishment, organization, membership, and policy. Includes agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees. This committee reviews audits and makes recommendations concerning operations of the institutions. Information includes audit reports, reports on assignments made by the committee, and information reports on the audit status at each institution. There is an index or finding aid for this record series.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-01-2014

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then transfer to State Archives with authority to weed.

APPRAISAL:

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

AGENCY: Board of Regents

SERIES: 11976

TITLE: Audit review subcommittee agenda

(continued)

PRIMARY DESIGNATION:

Public

UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 11973

3

TITLE: Audit work papers

DATES: 1972-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 2.50 cubic feet.

DESCRIPTION:

Papers which have a short-term use and comprise the background records, such as preliminary studies, drafts, analyses, notes, interim reports regarding a particular case file, and financial performance audits. These files document the work used to generate audit reports. Information includes financial and administrative records, detailed transactions of receipts and disbursements, and records and transactions relating to employee payroll.

RETENTION:

Retain for 1 year(s) after end of project or program

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 06-01-2013

FORMAT MANAGEMENT:

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

APPRAISAL:

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

AGENCY: Board of Regents

SERIES: 11973

TITLE: Audit work papers

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 12651

3

TITLE: Board of Trustees minutes

DATES: 1969-

ARRANGEMENT: Chronological

DESCRIPTION:

Records created by a committee or conference, including advisory committee's relating to executive establishment, organization, membership, and policy. Includes agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees. These records are used for office reference and contain the minutes of all actions taken at Utah System Higher Education institutions. The originals are held in the respective archives/libraries of the various institutions.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-01-2014

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12760

3

TITLE: Budget and Finance Committee files

DATES: 1969-

ARRANGEMENT: Alphabetical by subject, thereunder Chronological

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Records created by a committee or conference, including advisory committee's relating to executive establishment, organization, membership, and policy. Includes agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees. These files document the Budget and Finance Committee's minutes and agendas of their meetings. Includes information regarding Business Affairs Council, budget officers, tuition and fees, Funding Mechanism Task Force, State Board of Regents (SBR) Budget and Finance Committee, Personnel (Higher Education Personnel Advisory Committee - HEPAC), Study Group on Health Benefits, and handouts.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-01-2014

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Archives with authority to weed.

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

AGENCY: Board of Regents

SERIES: 12760

TITLE: Budget and Finance Committee files

(continued)

APPRAISAL:

These records have administrative, and/or historical value(s).
Disposition of records based on value in documenting activities,
achievements, policies and functions of the Committee.

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12667

4

TITLE: Budget background records

DATES: 1969-

ARRANGEMENT: Chronological by fiscal request year, thereunder alphabetical by institution

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Completed budget request forms and miscellaneous notes used to establish a budget request for the Utah System of Higher Education.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1993

FORMAT MANAGEMENT:

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

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

APPRAISAL:

These records have administrative, and/or fiscal value(s). This disposition is based on the administrative and fiscal needs of the agency.

AGENCY: Board of Regents

SERIES: 12667

TITLE: Budget background records

(continued)

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12761

3

TITLE: Budget development files

DATES: 1969-

ARRANGEMENT: Alphabetical by subject, thereunder Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Papers which have a short-term use and comprise the background records, such as preliminary studies, drafts, analyses, notes, interim reports regarding a particular case file, and financial performance audits. The Finance section of the State Board of Regents uses these files to develop budget requests. Information includes forms; guidelines; tuition and fee schedules; correspondence; Board of Regents' recommendations; trend analyses; information on administrative conferences, mineral leases, formula developments, institutional materials; and any other supporting documentation.

RETENTION:

Retain for 1 year(s) after end of project or program

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 06-01-2013

FORMAT MANAGEMENT:

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

APPRAISAL:

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

AGENCY: Board of Regents

SERIES: 12761

TITLE: Budget development files

(continued)

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12763

3

TITLE: Budget requests

DATES: 1969-

ARRANGEMENT: Chronological by, thereunder by institution

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records are created by the state's higher education institutions to assist in the preparation of the budget and to justify budget requests presented to the State Board of Regents for recommendation to the legislature. They may also include work programs. This series is a copy of record series #12667 which has a retention of 10 years and destroy.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 12-01-2016

FORMAT MANAGEMENT:

Paper: Retain in Office for 7 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s). Disposition based on value of records in documenting agency budget requests and supporting statistics for the state's institutions of higher education.

AGENCY: Board of Regents

SERIES: 12763

TITLE: Budget requests

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 11972

3

TITLE: Budget work program files

DATES: 1969-

ARRANGEMENT: Chronological, thereunder by institution

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Monthly or routine reports on the status of agency appropriation accounts and apportionment, excluding Annual Budget Reports. These records are used by the State Board of Regents to control appropriations from the state by institution and by line item. Information includes State Division of Finance work program forms and draw schedules.

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: Retain in Office for 3 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 24146

3

TITLE: Certified Technical Institute records

DATES: 1999.

ARRANGEMENT: Alphabetical by name.

TOTAL VOLUME: 3.00 cubic feet.

DESCRIPTION:

The Certified Technical Institute was a private proprietary school that went bankrupt in 1999. These files include the records of the students who were attending the institute when the school was closed.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/2002

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 10 years and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 13791

3

TITLE: Commission's correspondence

DATES: 1984-

ARRANGEMENT: Alphabetical by subject

DESCRIPTION:

Records not duplicated elsewhere that document how the office is organized and how it functions, its pattern of action, its policies, procedures and achievements.

RETENTION:

Retain for 4 year(s)

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 3 years and then transfer to State Records Center. Retain in State Records Center for 1 year and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). This correspondence provides unique information about agency functions, policies, procedures, or programs.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12742

3

TITLE: Deposit forms

DATES: 1969-

ARRANGEMENT: Chronological by fiscal year, thereunder by the date received

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Multi-copy deposit forms accompanying agency deposits to the State Treasurer's Office. These records also serve as a receipt of deposit.

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 and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12665

4

TITLE: Eisenhower Math/Science Program records

DATES: 1985-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.20 cubic feet.

DESCRIPTION:

Federal grant applications and documentation for grants awarded under the "Education for Economic Security Act" (USCA 20-3901 et seq.)(1984) and the Dwight D. Eisenhower Mathematics and Science Education Act"(USCA 20-2981-2983)(1988).

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1993

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 7 years and then destroy.

APPRAISAL:

These records have administrative, and/or fiscal value(s). This disposition is based on the administrative needs of the agency.

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 11970

3

TITLE: Employment search and interview records

DATES: 1969-

ARRANGEMENT: Chronological by year, thereunder by position

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Applications of those persons qualified to be listed on a register but who were not selected as the candidate for employment. If DHRM has officially delegated a particular state agency as the record copy office then they should retain these applications for three years. These records are collected by this office in the process of filling vacant positions. Materials include letters of application, resume and/or application.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 06-01-2015

FORMAT MANAGEMENT:

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

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

APPRAISAL:

These records have administrative value(s).

AGENCY: Board of Regents

SERIES: 11970

TITLE: Employment search and interview records

(continued)

PRIMARY DESIGNATION:

Protected 63G-2-305(27) (2008)

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 19990

3

TITLE: Enrollment analysis reports

DATES: 1959-1974.

ARRANGEMENT: Chronological by date.

DESCRIPTION:

The purpose of these reports is to present current and projected enrollment data for the institutions in the system of higher education. The reports contain information pertaining to total number enrolled, daytime and nighttime enrollment, male and female enrollment, elementary and secondary school enrollment, out-of-state enrollment, public and private school enrollment and enrollment in each class.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have historical value(s).
Disposition based on the value of these records in documenting agency/program achievements, policies, procedures, and function.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12769

4

TITLE: Enrollment reports

DATES: 1965-

ARRANGEMENT: Chronological by academic year (summer, fall, winter, spring)

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Reports of student enrollments from the state's (public) higher education institutions with statistical analysis by age, residency, and full-time/part-time status.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

RETENTION JUSTIFICATION:

The agency is considering filming these at some future time.

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12752

4

TITLE: External surveys

DATES: 1969-

ARRANGEMENT: Alphabetical by subject

ANNUAL ACCUMULATION: 0.20 cubic feet.

DESCRIPTION:

Responses to surveys sent to the State Board of Regents from outside organizations requesting financial/budget information, kept to check figures and to review previous years when similar surveys are received. Information includes responses to surveys such as Internal Service Funds, High School Intentions, and Occupational Safety and Health Administration.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1993

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs of the agency.

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12752

TITLE: External surveys

(continued)

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 82689

3

TITLE: Financial aids and scholarships files

DATES: ca. 1980-

ARRANGEMENT: none

DESCRIPTION:

These computer tapes document financial aid given to students to complete their education. The files include student name, amounts loaned or given, social security number, eligibility information, and other student data.

RETENTION:

Retain for 25 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

FORMAT MANAGEMENT:

Computer magnetic storage media: Retain in Office until transferred to computer output microfiche and then erase tapes provided this is done immediately.

Microfiche master: Retain in Office for 25 years and then destroy.

Computer magnetic storage media: Retain in Office for 3 years and then erase.

Computer magnetic storage media: Retain in Office until administrative needs end and then erase.

Paper: Retain in Office for 2 months and then transfer to State Records Center. Retain in State Records Center for 298 months and then destroy.

AGENCY: Board of Regents

SERIES: 82689

TITLE: Financial aids and scholarships files

(continued)

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). This retention is based on administrative and audit needs, and 34 CFR 682.408 which stipulates that records involving student loans be maintained for five years after the final payment of the loan or five years after the payment of the loan is determined to be uncollectible. 34 CFR 682.401(b)(9) indicates that there is a maximum repayment period of fifteen years after the loan is made. A twenty-five year retention allows for a possible five year deferment and the stipulated five year retention after the loan has been paid in full.

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(h)(2008)

AGENCY: Board of Regents

SERIES: 12764

3

TITLE: Financial correspondence

DATES: 1969-

ARRANGEMENT: Alphabetical by subject

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

These files include all correspondence related to budget and finance. Information includes correspondence regarding state government, the federal government, Board of Regents, Utah System of Higher Education (USHE) presidents, USHE institutions, Office of the Commissioner of Higher Education, all budget and finance committees, other states, professional organizations, and internal communications. Communications that are important to high level decisions or policy are incorporated into record series #11939 (Monthly agenda and materials) which has a permanent retention.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Transitory correspondence, GRS-1759.

AUTHORIZED: 05-01-2014

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
Disposition based on value of records in documenting all correspondence related to agency budgets and finance.

AGENCY: Board of Regents

SERIES: 12764

TITLE: Financial correspondence

(continued)

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12743 3

TITLE: Financial Information and Resource Management System periodic reports

DATES: 1969-

ARRANGEMENT: Chronological by fiscal year, thereunder by month

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Includes the following: FICAA01T Trail balance monthly. FICAA05P Outstanding encumbrance. FICAA09P Outstanding reservation. FICAA10P Cash deposits. FICAA30P General ledger activity. FICAA85P Revenue and expenditure status by fund. FICAED01 Expenditure detail by sub-account. FICAES01 Expenditure status by sub-account. FICAES02 Work program/expenditure comparison by summary account. FICARD01 Revenue detail by sub-account within organization. FICARS01 Revenue status by sub-account. FICARS02 Estimated revenue/realized revenues. FICAER01 Expenditure/revenue summary by level 2. FICAMP01 Revenue account status by activity other than Department of Transportation. These records are referred to by the State Board of Regents at times to document payments of scholarship money to students and/or payments to/from students who have loans. Loans and scholarships, however are more fully documented in other series.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

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

AGENCY: Board of Regents

SERIES: 12743

TITLE: Financial Information and Resource Management System periodic reports

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. UCA 63G-2-302 (1)(e) (2008) Social Security Number

AGENCY: Board of Regents

SERIES: 12744 3

TITLE: Financial Information and Resource Management System year-end reports

DATES: 1969-1998.

ARRANGEMENT: Chronological by fiscal year

DESCRIPTION:

Yearly or period 13 edition of FIRMS reports. The reports are used by the State Board of Regents to check on payments made to/students regarding scholarships and loans. However, scholarships and loans are documented more fully in other series.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. UCA 63G-2-302 (1)(e) (2008) Social Security Number

AGENCY: Board of Regents

SERIES: 12746

3

TITLE: Fixed asset inventory

DATES: 1969-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records are used to track and control capital outlay such as office equipment (chairs, typewriters, etc.) and other fixed assets including tools, machinery, and other large equipment.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-01-1990

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 19965

TITLE: Focus: A Forum on Teaching and Learning in Utah Community and Technical Colleges magazine

3

DATES: 1982-

ARRANGEMENT: Chronological

DESCRIPTION:

This magazine is produced as a forum and means of dialog and communication for all persons interested in community and technical college education in Utah. The magazine is an annual collection of articles on teaching and learning in these institutions.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have historical value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 82688

3

TITLE: General accounting files

DATES: ca. 1980-1986.

ARRANGEMENT: none

DESCRIPTION:

These computer tapes provide general accounting data for the colleges involved. The files include accounts receivable data, disbursements data, ledger data, and other information relating to college accounts.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

FORMAT MANAGEMENT:

Computer magnetic storage media: Retain in Office until transferred to computer output microfiche and then erase tapes provided this is done immediately.

Microfiche master: Retain in Office for 10 years and then destroy.

Computer magnetic storage media: Retain in Office for 3 years and then erase.

Computer magnetic storage media: Retain in Office until administrative needs end and then erase.

APPRAISAL:

These records have administrative, and/or fiscal value(s). This retention is based on administrative and audit needs and General Schedule 7 Item 2.

AGENCY: Board of Regents

SERIES: 12745

3

TITLE: General ledgers

DATES: 1969-

ARRANGEMENT: Chronological by fiscal year

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

General accounts ledger, showing debit and credit entries, and reflecting expenditures in summary.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule State government accounts payable and receivable records, GRS-1854.

AUTHORIZED: 12-01-2016

FORMAT MANAGEMENT:

Paper: Retain in Office for 7 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 12652

3

TITLE: General reference materials

DATES: 1969-2015.

ARRANGEMENT: Alphabetical by name of publication

DESCRIPTION:

These are documents retained strictly for reference and informational purposes which are not part of any other official files. Records may include copies of reports, studies, special compilations of data, drawings, periodicals, books, clippings, extra (non-record) copies of policy and procedure files, brochures, catalogs, vendor price lists, and publications prepared internally and externally. This series contains academic, fiscal, administrative, and historical data published by the federal, state, and local governments, and private publications regarding higher education housed at the State Board of Regents library.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
Disposition based on value of diverse records not contained elsewhere for information and reference purposes.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 19988

3

TITLE: Higher Education Master Plan reports

DATES: 1966-

ARRANGEMENT: Chronological

DESCRIPTION:

The main objective of the master plan is to ensure that the benefits of high quality higher education are made available to Utah citizens. The reports contain information pertaining to review and prospectus, changing environment, goals and assumptions, projected needs and demands, institutional roles and missions, estimated resource needs, enrollment management, and accountability and quality.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

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

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have administrative, and/or historical value(s). The reports contain information pertaining to review and prospectus, changing environment, goals and assumptions, projected needs and demands, institutional roles and missions, estimated resource needs, enrollment management, and accountability and quality.

AGENCY: Board of Regents

SERIES: 19988

TITLE: Higher Education Master Plan reports

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12654

1

TITLE: Institutional catalogs

DATES: 1969-2015.

ARRANGEMENT: Alphabetical by name of institution

DESCRIPTION:

These records are created by the various institutions of higher education and are the catalogs/bulletins that describe academic programs/requirements; classes; degrees offered; administrative policy; tuition, enrollment, and registration information; add/drop procedures; extracurricular activities; school policies; and so forth. Information also includes faculty and administrative officers data and campus maps.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2015.

AGENCY: Board of Regents

SERIES: 12648

1

TITLE: Institutional internal audits and annual financial reports

DATES: 1995-2015.

ARRANGEMENT: Chronological

DESCRIPTION:

These are documents retained strictly for reference and informational purposes which are not part of any other official files. They include copies of reports, studies, and special compilations of data. These records are created by colleges and universities and are used by the Board of Regents as reference data on the various educational institutions.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

FORMAT MANAGEMENT:

Paper copy: Retain in Office for 5 years or until administrative need ends and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12653

3

TITLE: Institutional policy and procedures manuals

DATES: 1969-

ARRANGEMENT: Alphabetical by name of institution

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Policies and procedures that govern the operation and administration of various programs within the organization. This series consists of the policies and procedures of all higher education institutions and are used for reference.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 02-01-2015

FORMAT MANAGEMENT:

Paper copy: Retain in Office until superseded or until administrative need ends and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 04/2015.

AGENCY: Board of Regents

SERIES: 12649

4

TITLE: Integrated Postsecondary Educational Data System records

DATES: 1967-

ARRANGEMENT: Alphanumerical by survey form subject, thereunder chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Records gathered nationally by the U.S. Department of Education to provide a national database for higher education information, includes data input by the State Board of Regents to generate reports of their own data for statistical analysis. Formerly known as Higher Education General Information Survey (HEGIS) the data base is now called Integrated Postsecondary Education Data System (IPEDS). Information includes a government form completed by Utah's higher education institutions, sent to and edited by the Office of the Commissioner of Higher Education (OCHE), and then forwarded to the federal government. Information includes institutional characteristics, such as size/enrollment, finances, and number of degrees awarded.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

Computer data files: Retain in Office for 10 years and then delete.

APPRAISAL:

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

This disposition is based on the historical use of the records for statistical research.

AGENCY: Board of Regents

SERIES: 12649

TITLE: Integrated Postsecondary Educational Data System records

(continued)

PRIMARY DESIGNATION:

Private UCA 63G-2-302(2)(d) (2015)

AGENCY: Board of Regents

SERIES: 11974

3

TITLE: Internal audit reports

DATES: 1972-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Reports on analysis and implementation of programs and operation of those programs. These records report audit findings and contain recommendations for the State Board of Regents. These records have an index or finding aid to assist access.

RETENTION:

Retain for 5 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-01-2016

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public UCA 63G-2-301(2)(q) (2008)

AGENCY: Board of Regents

SERIES: 3045

3

TITLE: Minutes

DATES: 1850-

ARRANGEMENT: Alphanumerical

DESCRIPTION:

Minutes of the board of regents. These files contain memoranda, preliminary reports, and other records documenting assignments and the progress of projects. These files do not contain the final reports.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in State Archives permanently after microfilming.

Microfilm master: Retain in State Archives permanently with authority to weed.

Microfilm duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public UCA 63G-2-301(1)(e)(2008)

AGENCY: Board of Regents

SERIES: 11975

3

TITLE: Money management reports

DATES: 1973-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Report prepared by internal or external auditors as a result of a financial audit. These records are created in order to comply with UCA 51-7-13(2) (1992) making state agencies accountable to how federal or state grants are invested. They contain financial reports of the money management activities of the various state institutions of higher education.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-01-2016

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 3 years and then transfer to State Archives with authority to weed.

APPRAISAL:

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

AGENCY: Board of Regents

SERIES: 11975

TITLE: Money management reports

(continued)

PRIMARY DESIGNATION:

Public UCA 63G-2-301(2)(q) (2008)

AGENCY: Board of Regents

SERIES: 11939

3

TITLE: Monthly agenda and materials

DATES: 1969-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Records created by a committee or conference, including advisory committee's relating to executive establishment, organization, membership, and policy. May include agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees. These records are generated by the State Board of Regents to document meetings discussing and planning the administration of colleges and universities under their jurisdiction.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-01-2014

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Archives with authority to weed.

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

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

AGENCY: Board of Regents

SERIES: 11939

TITLE: Monthly agenda and materials

(continued)

APPRAISAL:

These records have administrative, and/or historical value(s).
Disposition based on value of records in documenting the meetings
of the Board of Regents, achievements, issues reviewed, and
outcomes.

PRIMARY DESIGNATION:

Public 63G-2-301(2)(a) (2008)

AGENCY: Board of Regents

SERIES: 12762

3

TITLE: Official project files

DATES: 1969-

ARRANGEMENT: Alphabetical by subject

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Papers which have a short-term use and comprise the background records, such as preliminary studies, drafts, analyses, notes, interim reports regarding a particular case file, and financial performance audits. These records are used by the State Board of Regents to improve the efficiency of the Utah System of Higher Education. Information includes annual vehicle report, cost study, fusion, graduate tuition and fees, health and dental plans (1989-1990), president salary survey, strategic planning, vocational maintenance of effort, legislative fiscal notes, and other related documentation.

RETENTION:

Retain for 1 year(s) after end of project or program

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 06-01-2013

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).

AGENCY: Board of Regents

SERIES: 12762

TITLE: Official project files

(continued)

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 19535

3

TITLE: Operating budget requests

DATES: 1970-

ARRANGEMENT: Chronological

DESCRIPTION:

This series contains budget requests to the State Legislature pertaining to the Higher Education institutions within the state. Also includes supplement titled "Data Book".

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have historical value(s).
Disposition based on value of records in documenting budget requests with supporting data for the state's institutions of higher education. The requests are presented to the State Board of Regents.

AGENCY: Board of Regents

SERIES: 19535

TITLE: Operating budget requests

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 9046

3

TITLE: Payroll check register

DATES: 1969-

ARRANGEMENT: Chronological by pay period

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records are used to monitor checks printed each pay period by the University of Utah for payment of the personnel of the State Board of Regents. The University holds the original copies (Record Series #9521) for a longer period of time. Information includes social security number, name, and amount paid.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1993

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs of the agency.

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(h)(2008)

AGENCY: Board of Regents

SERIES: 9046

TITLE: Payroll check register

(continued)

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 82687

3

TITLE: Payroll files

DATES: ca. 1980-1986.

ARRANGEMENT: none

DESCRIPTION:

These computer tapes contain payroll data of individual earnings and service records. They include employee name, withholdings, hours worked, social security number, and other salary data.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

FORMAT MANAGEMENT:

Computer magnetic storage media: Retain in Office until transferred to computer output microfiche and then erase tapes provided this is done immediately.

Microfiche master: Retain in Office for 56 years and then destroy.

Computer magnetic storage media: Retain in Office for 3 years and then erase.

Computer magnetic storage media: Retain in Office until destroyed and then erase provided this is done immediately.

APPRAISAL:

These records have administrative, and/or fiscal value(s). This retention is based on administrative and audit needs and General Schedule 2 Item 1.

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 9047

3

TITLE: Payroll reports

DATES: 1969-

ARRANGEMENT: Chronological by year, thereunder numerical by pay period

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

These records detail salary and benefit payments by individual and by cost code. Information includes social security number, name, amount paid, benefit payments both by pay period and by year to date. The originals are held by the University of Utah for 3 years.

RETENTION:

Retain for 2 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs of the agency.

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(h) (2008)

AGENCY: Board of Regents

SERIES: 9047

TITLE: Payroll reports

(continued)

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 11971

3

TITLE: Personnel files for permanent employees

DATES: 1969-

ARRANGEMENT: Chronological by termination date

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

Complete work history of individual while employed by the State. Refer to UCA 67-18-1, et seq. When an employee transfers to another state agency, the official personnel file must be sent to the new agency. File should include current information on performance evaluations, performance plans, position description, career mobility agreement, insurance benefits notification (ADNT-1), job swap agreement, and overtime agreement where applicable. Also contains application for employment, employees' social security card (copy), Notice of personnel action (DHRM 33), Human resource profile/events (DHRM 34), Termination form (DHRM 35), Employment eligibility verification form, Exit interview form, New employee orientation self-guide, and retirement/deferred compensation plan notification (ADNT-2). May contain documentation on employee withholding, completion of course certificates, conflict of interest letters, incentive award results, letters of commendation, leave records, health records, and leave adjustment reports. The Board of Regents uses these records to maintain salary information, performance evaluations, and miscellaneous correspondence on former and current employees.

RETENTION:

Retain for 65 year(s) after after separation

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 06-01-2017

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year after retirement or separation of employee and then transfer to State Records Center. Retain in State Records Center for 64 years after date of employment or

AGENCY: Board of Regents

SERIES: 11971

TITLE: Personnel files for permanent employees

(continued)

until 3 years after death or retirement and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(e) (2008)

SECONDARY DESIGNATION(S):

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

Exempt. Salary information (UCA 53B-7-205) (2008)

AGENCY: Board of Regents

SERIES: 24147

3

TITLE: Presidential search records

DATES: 1999-

ARRANGEMENT: Chronological by year, thereafter alphabetical by name.

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

These records are compiled when an Institution for Higher Education conducts a search for a new President. Records within these files include such documents as applicants resumes, tables outlining applicants credentials, and interview notes.

RETENTION:

Retain for 11 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/2002

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 10 years and then transfer to State Archives.

APPRAISAL:

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

PRIMARY DESIGNATION:

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

AGENCY: Board of Regents

SERIES: 12753

3

TITLE: Public request forms

DATES: 1980-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Requests for Information forms and other miscellaneous data given to the public by the financial office of the State Board of Regents.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 12/1993

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
This disposition is based on the administrative needs of the agency.

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12753

TITLE: Public request forms

(continued)

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 11945

3

TITLE: Publications

DATES: 1957-

ARRANGEMENT: Chronological

DESCRIPTION:

This series contains publications prepared by the Coordinating Council of Higher Education followed by the current Board of Regents. The publications contain information pertaining to degree program proposals, histories, class size, teaching loads, salary costs, job descriptions, occupational and cultural needs, facilities, personnel analysis, planning, legal issues, and recommendations. Consists mostly of isolated publications not in other series. Any record, regardless of format, that is issued by a governmental entity for public distribution at the total or partial expense of that governmental entity. See Utah Code Section 9-7-101 8(a)(b) (2010) and 9-7-208 (2006)

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

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

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

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

AGENCY: Board of Regents

SERIES: 11945

TITLE: Publications

(continued)

APPRAISAL:

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

Disposition based on value of diverse publications in documenting the issues considered, achievements, policies, programs and functions of the Coordinating Council of Higher Education followed by the current State Board of Regents.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 27390

3

TITLE: Regents' Scholarship files

DATES: 2008-

ARRANGEMENT: Chronological by year, thereunder alphabetical by student surname.

DESCRIPTION:

These files document the selection, qualifications, eligibility, and progress of students in the Regent's Scholarship program. The program was created in 2008 by the Utah State Board of Regents to award scholarships to exceptional Utah high school students. Files are used to track all incoming documentation from participating students, parents, high schools, colleges, and universities. Information includes names; Social Security numbers; addresses; phone numbers; applications; high school, college, and university transcripts; national test scores; class schedules; award letters; correspondence; and other related information.

RETENTION:

Retain for 6 year(s) and 3 month(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/2010

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 months and then transfer to State Records Center. Retain in State Records Center for 6 years and then destroy.

Digital image: Retain in Office until administrative need ends and then delete.

AGENCY: Board of Regents

SERIES: 27390

TITLE: Regents' Scholarship files

(continued)

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). Records are used to administer and evaluate the program. The records have fiscal value as they document the expenditure of public funds. Records have legal value as they may be audited or used in litigation.

PRIMARY DESIGNATION:

Private 63G-2-302(1)(h),(j), and (l); (2)(b),(c), and (d).

SECONDARY DESIGNATION(S):

Public

AGENCY: Board of Regents

SERIES: 12768

3

TITLE: Salary survey data

DATES: 1985-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.50 cubic feet.

DESCRIPTION:

These records compare salary and benefits data for staff and faculty and Utah's higher education institutions to respective comparison groups. Information includes institutional salary and benefits data, marketplace data, Radford/CUPA data.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

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

APPRAISAL:

These records have administrative value(s).
Disposition based on value of these records in documenting daily activities of high level municipal officials.

PRIMARY DESIGNATION:

Private UCA 53B-7-201-205 (1987)

AGENCY: Board of Regents

SERIES: 12754 3

TITLE: State Board of Regents and Council of Presidents financial agenda items

DATES: 1969-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 0.10 cubic feet.

DESCRIPTION:

Records created by a committee or conference, including advisory committee's relating to executive establishment, organization, membership, and policy. Includes agenda, meeting minutes, final reports, and related records documenting the accomplishments of official boards and committees. These files are agenda items from the Finance section that are incorporated into the Board of Regents meeting agenda (record series #12640) which has a permanent retention.

RETENTION:

Retain for 55 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 07-01-2014

FORMAT MANAGEMENT:

Paper copy: Retain in Office for 5 years and then transfer to State Records Center. Retain in State Records Center for 50 years and then transfer to State Archives with authority to weed.

APPRAISAL:

These records have administrative value(s).

AGENCY: Board of Regents

SERIES: 12754

TITLE: State Board of Regents and Council of Presidents financial agenda items

(continued)

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 9053

3

TITLE: Student case files

DATES: 1898-

ARRANGEMENT: None

ANNUAL ACCUMULATION: 10.00 cubic feet.

DESCRIPTION:

Includes application for admission or readmission, acceptance or rejection letters, residency applications, non-matriculation letter, evaluations, test results, and official transcripts.

RETENTION:

Retain Permanently

DISPOSITION:

Permanent. May Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 02/1985

FORMAT MANAGEMENT:

Paper: Retain in Office permanently after being microfilmed and then microfilm on aperture cards.

Aperture cards: Retain in Office permanently.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(a)(2008)

AGENCY: Board of Regents

SERIES: 82686

3

TITLE: Student cumulative files

DATES: ca. 1980-1986.

ARRANGEMENT: none

DESCRIPTION:

These computer tapes contain information which documents the student's activities while enrolled at the college. These files include student name, social security number, address, telephone number, courses taken, grades, honors and awards, class standing, and other information relating to activities and obligations.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 06/1987

FORMAT MANAGEMENT:

Computer magnetic storage media: Retain in Office until transferred to computer output microfiche and then erase tapes provided this is done immediately.

Microfiche master: Retain in Office for 75 years and then destroy.

Computer magnetic storage media: Retain in Office until graduation or withdrawal and then erase.

Computer magnetic storage media: Retain in Office until destroyed and then erase provided this is done immediately.

APPRAISAL:

These records have administrative value(s).
This retention is based on administrative needs and General Schedule 15 Item 1.

AGENCY: Board of Regents

SERIES: 82686

TITLE: Student cumulative files

(continued)

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 83130

3

TITLE: Student loan outstanding bonds

DATES: 1983-

ARRANGEMENT: alphabetical by name

ANNUAL ACCUMULATION: 6.00 cubic feet.

DESCRIPTION:

This is a master list of who covered loans, what account the money was allocated from and how it will be repaid to the account.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 09/1988

FORMAT MANAGEMENT:

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:

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

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 9054

3

TITLE: Student loan records

DATES: 1975-1983.

ARRANGEMENT: None

DESCRIPTION:

Includes application, financial disclosure, payment schedules, evaluations, promissory notes, and collections.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 02/1985

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then microfilm and destroy provided microfilm has passed inspection.

Microfiche master: Retain in Office for 3 years after case is closed and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 24193

3

TITLE: Student services and minority affairs grants and financial awards

DATES: 1990-

ARRANGEMENT: Chronological by year, thereafter alphabetical by name.

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These files include applications for Utah Coalition for the Advancement of Minorities in Higher Education (UCAME), Mathematics Engineering Science Achievement (MESA), Students Serving Utah Network (SUN), and Golden Shield scholarship/grant recipients. Files include such information as the amount of funding received and information on how the grant is being managed.

RETENTION:

Retain for 28 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 07/2002

FORMAT MANAGEMENT:

Paper: Retain in Office for 3 years and then transfer to State Records Center. Retain in State Records Center for 25 years and then destroy.

APPRAISAL:

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

AGENCY: Board of Regents

SERIES: 24193

TITLE: Student services and minority affairs grants and financial awards

(continued)

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 19963

3

TITLE: System Summary newsletter

DATES: 1968-

ARRANGEMENT: Chronological

DESCRIPTION:

This newsletter provides information about the Utah System of Higher Education. The articles pertain to budget, legislative actions, enrollment, Board of Regents actions', and a column by the Commissioner.

RETENTION:

Retain until administrative need ends

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 03-19-2018

FORMAT MANAGEMENT:

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

Microfiche master: Retain in State Archives permanently with authority to weed.

Microfiche duplicate: Retain in State Archives permanently with authority to weed.

APPRAISAL:

These records have historical value(s).

Newsletters help document this history and functions of an agency.

AGENCY: Board of Regents

SERIES: 19963

TITLE: System Summary newsletter

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 14202

3

TITLE: Technical Engineering Institute student records

DATES: 1982-1994.

ARRANGEMENT: Alphabetical by student surname

TOTAL VOLUME: 2.00 cubic feet.

DESCRIPTION:

These records include official documentation listing student's courses, grades, credits earned, and status achieved. Also included are confidential job placement advisory forms, financial records showing payment of tuition, and attendance records.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Academic record files, GRS-2445.

AUTHORIZED: 07-01-1990

FORMAT MANAGEMENT:

Paper: Retain in Office until school closing and then transfer to State Archives with authority to weed.

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 12747

3

TITLE: Telephone bills

DATES: 1969-

ARRANGEMENT: Chronological by fiscal year

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Bills which document calls made from state offices. Bills also include the number called and the length, time, and date of phone call.

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: Retain in Office for 1 year and then transfer to State Records Center. Retain in State Records Center for 2 years and then destroy.

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:

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

AGENCY: Board of Regents

SERIES: 12747

TITLE: Telephone bills

(continued)

PRIMARY DESIGNATION:

Public UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 6123

3

TITLE: Teller Training Institute files

DATES: 1985-1988.

ARRANGEMENT: Chronological by year, thereunder alphabetical

DESCRIPTION:

These files are created by the Teller Training Institute to monitor their students' progress. Individual files are kept on each student. Information includes instructor's evaluation, contact and referral sheet (vita), job search and career counseling policy, student personnel file, mock interview evaluation, student index card, application enrollment agreement, progress sheet, and graduate's confidential data sheet. These files have become the property of the State Board of Regents in accordance with UCA 53B-5-109.

RETENTION:

Retain for 75 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 month and then transfer to State Records Center. Retain in State Records Center for 75 years and then destroy.

APPRAISAL:

These records have administrative value(s).
These records may be destroyed after 75 years because copies of transcripts will no longer be needed after that time.

AGENCY: Board of Regents

SERIES: 6123

TITLE: Teller Training Institute files

(continued)

PRIMARY DESIGNATION:

Private

AGENCY: Board of Regents

SERIES: 6557

3

TITLE: Teller Training Institute student financial records

DATES: 1985-1988.

ARRANGEMENT: Chronological, thereunder alphabetical

TOTAL VOLUME: 1.00 cubic foot.

DESCRIPTION:

These records were created by the Teller Training Institute to monitor students' financial accounts. Records consist of a yearly record of charges and receipts on a day-by-day basis. Information includes student ledger card, bank deposits and receipts, and some contracts.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Financial information network (fi-net) payment records, GRS-1842.

AUTHORIZED: 06-01-1996

FORMAT MANAGEMENT:

Paper: Retain in Office until 1 month has passed and then transfer to State Records Center. Retain in State Records Center for 7 years and then destroy.

APPRAISAL:

These records have fiscal value(s).
These records may be destroyed after 7 years because they will no longer be needed for the purposes of audit by the Internal Revenue Service.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12748

3

TITLE: Travel records

DATES: 1969-

ARRANGEMENT: Chronological by fiscal year

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Records relating to reimbursing individuals, such as travel orders, travel authorizations, per diem vouchers, transportation requests, hotel reservations, and all supporting records documenting official travel by officers, employees, dependents, or others authorized by law to travel. The State Board of Regents handles travel requests, reimbursements, and so forth through the University of Utah rather than the State Division of Finance.

RETENTION:

Retain for 3 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 04-01-2009

FORMAT MANAGEMENT:

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:

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

AGENCY: Board of Regents

SERIES: 12748

TITLE: Travel records

(continued)

PRIMARY DESIGNATION:

Public

UCA 63G-2-301 (2008)

AGENCY: Board of Regents

SERIES: 12741 3

TITLE: University of Utah expenditure forms

DATES: 1969-

ARRANGEMENT: Chronological by fiscal year, thereunder alphabetical by department

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These records are requests from the Board of Regents to the University of Utah to pay vendors for supplies and/or services the vendors have provided to the agencies. They have the same function as warrant requests except that the record copy is held by the University in record series #84282, #84390, #84392, #84394, or #84395.

RETENTION:

Retain for 1 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

AUTHORIZED: 10-01-2001

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12741

TITLE: University of Utah expenditure forms

(continued)

SECONDARY DESIGNATION(S):

Private. UCA 63G-2-302 (1)(e) (2008) Social Security Number

AGENCY: Board of Regents

SERIES: 12697

3

TITLE: University of Utah time and attendance reports

DATES: 1969-

ARRANGEMENT: Chronological by fiscal year, thereunder by pay period

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These are documents sent by University of Utah's department of finance to the State Board of Regents to record final corrections or adjustments regarding employees' pay. They are made before the master payroll file is run and checks are issued. The originals are held by the University of Utah.

RETENTION:

Retain for 1 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 1 year and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(e) (2008) Social Security Number

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 12697

TITLE: University of Utah time and attendance reports

(continued)

Exempt. UCA 53B-7-205 (1987) Salary information

AGENCY: Board of Regents

SERIES: 12655

4

TITLE: Utah Career Teaching Scholarship records

DATES: 1984-

ARRANGEMENT: Alphabetical by student surname

ANNUAL ACCUMULATION: 2.40 cubic feet.

DESCRIPTION:

Records track the recipients of Utah Career Teaching Scholarships (UCTS) (UCA 53B-10(101-103)(1987)), awarded to individuals who meet the criteria and intend to teach in the public schools of this state. They track the student/teacher through the program.

RETENTION:

Retain for 15 year(s) after end of project or program

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

These records are in Archives' permanent custody.

APPROVED: 12/1993

FORMAT MANAGEMENT:

Paper: Retain in Office for 1 year or until recipient has completed program requirements and then transfer to State Records Center. Retain in State Records Center for 14 years and then destroy.

APPRAISAL:

These records have administrative, fiscal, and/or legal value(s). This disposition is based on the administrative needs of the agency.

AGENCY: Board of Regents

SERIES: 12655

TITLE: Utah Career Teaching Scholarship records

(continued)

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(e) (2008)

SECONDARY DESIGNATION(S):

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

AGENCY: Board of Regents

SERIES: 27660

3

TITLE: Utah System of Higher Education--Academic Affairs

DATES: 2010-

ARRANGEMENT: Numerical

ANNUAL ACCUMULATION: 2.00 cubic feet.

DESCRIPTION:

Records in this series contain budgets, reports, histories, proposals, etc., of academics in the Utah Higher Education institutions. The records are used to develop budget reports, budget histories, budget proposals for academic affairs for all Utah System of Higher Education institutions.

RETENTION:

Retain for 10 year(s)

DISPOSITION:

Permanent. Transfer to Archives.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Open meeting recordings, GRS-1712.

AUTHORIZED: 07-01-2014

FORMAT MANAGEMENT:

Paper: Retain in Office for 6 months and then transfer to State Records Center. Retain in State Records Center for 10 years and then transfer to State Archives with authority to weed.

Compact disc: Retain in Office for 6 months and then transfer to State Records Center. Retain in State Records Center for 10 years and then transfer to State Archives with authority to weed.

Digital Versatile Disk - Rewritable: Retain in Office for 6 months and then transfer to State Records Center. Retain in State Records Center for 10 years and then transfer to State Archives with authority to weed.

AGENCY: Board of Regents

SERIES: 27660

TITLE: Utah System of Higher Education--Academic Affairs

(continued)

APPRAISAL:

These records have administrative value(s).

This retention is based on the administrative needs expressed by the agency.

PRIMARY DESIGNATION:

Public

AGENCY: Board of Regents

SERIES: 12740

3

TITLE: Warrant requests and journal entries

DATES: 1969-

ARRANGEMENT: Chronological

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

Requests from state agencies to the Division of Finance to pay vendors for supplies and/or services the vendors have provided to the agencies. Includes warrant requests and journal entries.

RETENTION:

Retain for 2 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 2 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. UCA 63G-2-302 (1)(e) (2008) Social Security Number

AGENCY: Board of Regents

SERIES: 24148

3

TITLE: Western Institute Commission for Higher Education Scholarship files

DATES: 1998-

ARRANGEMENT: Chronological by date, thereafter alphabetical by name.

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

These files contain information on Western Interstate Commission for Higher Education scholarship recipients. These files contain such records as scholarship applications and documents containing applicant financial information.

RETENTION:

Retain for 27 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

APPROVED: 05/2002

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 25 years and then destroy.

APPRAISAL:

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

PRIMARY DESIGNATION:

Private UCA 63G-2-302(1)(h) (2008)