



UTAH RAMP

UTAH EDUCATION RECORDS RETENTION SCHEDULE

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UTAH RAMP – RETENTION SCHEDULE

Utah Records Appraisal & Management Program

THIS SCHEDULE APPLIES TO: LOCAL EDUCATION AGENCIES (LEA’S) AND THE UTAH STATE BOARD OF EDUCATION (SEA).

Scope of records retention schedule

This records retention schedule authorizes the destruction/transfer of records of LEA’s relating to the function of pre-kindergarten through grade 12 education.

Disposition of public records

Records covered by records series within this records retention schedule must be retained for the minimum retention period as specified in this schedule. Division of Archives and Records Service strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of local resources.

Public records designated as Archival (Permanent Retention) or Non-Archival (with a retention period of "Life of the Agency" or "Permanent") must not be destroyed. Records designated as Archival (Appraisal Required) must be appraised by the Division of Archives and Records Service before disposition. Records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such records must be managed in accordance with the agency's policies and procedures for legal holds.

In addition to the minimum retention requirements specified in this schedule, there may be additional (longer) retention requirements mandated by federal, state and/or local statute, grant agreement, and/or other contractual obligations.

Revocation of previously issued records retention schedules

All previously approved disposition authorities for records that are covered by this retention schedule are revoked, including those listed in all general and agency unique retention schedules. Local government agencies should take measures to ensure that the retention and disposition of public records is in accordance with current approved records retention schedules.

INTRODUCTION

School districts accumulate thousands of pages of records every year— records that soon become obsolete. Questions arise frequently regarding records retention, destruction, and the interpretation of statutes relating to transfer of records. In response to requests for assistance, the Utah State Board of Education has revamped this document to examine the issues of records retention and development of strategies for handling records common to all school districts.

The retention periods listed cover both hard copy and electronic records.

All records are required to be maintained and disposed of by state agencies in accordance with the provisions of [Utah Code 63G-2-604](#):

Effective 5/14/2019

63G-2-604. Retention and disposition of records.

- (1) (a) *Except for a governmental entity that is permitted to maintain the governmental entity's own retention schedules under [Part 7, Applicability to Political Subdivisions, the Judiciary, and the Legislature](#), each governmental entity shall file with the Records Management Committee created in Section [63A-12-112](#) a proposed schedule for the retention and disposition of each type of material that is defined as a record under this chapter.*
- (b) *After a retention schedule is reviewed and approved by the Records Management Committee under Subsection [63A-12-113\(1\)\(b\)](#), the governmental entity shall maintain and destroy records in accordance with the retention schedule.*
- (c) *If a governmental entity subject to the provisions of this section has not received an approved retention schedule from the Records Management Committee for a specific type of material that is classified as a record under this chapter, the model retention schedule maintained by the state archivist shall govern the retention and destruction of that type of material.*
- (2) *A retention schedule that is filed with or approved by the Records Management Committee under the requirements of this section is a public record.*

Amended by Chapter [254](#), 2019 General Session

Adoption of the UTAH R.A.M.P. will:

- Provide guidance regarding records that should be preserved locally or are of interest to the Division of Archives and Records Service; and
- Eliminate paperwork for both the education agency and the Division of Archives and Records Service.

District Options for Adoption

The Schedule serves as a guidepost against which to check the individual needs of each school district. A school district may adopt the entire Schedule, individual sections, or a modified version. Division of Archives and Records Service along with the Utah State Board of Education recommends that school districts adopt the UTAH R.A.M.P. School districts are advised to adopt the Schedule even though they may not have all the records listed in it. A school district may adopt the entire schedule, individual sections, or a modified version. A school district may develop a Schedule with different retention periods from those listed. For records to be retained less than seven years, the school district may not adopt a retention period shorter than that indicated in the Schedule without the approval of the State Records Management Committee. A new Schedule, or list of modifications, must be sent with the Notification Form. An adopted Schedule becomes the district's policy on record retention, destruction, and local preservation and/or transfer of records to the Division of Archives and Records Service.

GLOSSARY

ACTIVE RECORDS

Records that are referenced more than once per month per file drawer are considered active. Active records should be maintained in the office.

ADMINISTRATIVE FILES

Records documenting the operation, management, and administration of an office; usually distinguished from program records that relate to the office's primary function. Generally, eighty percent of the references made to a record occur within one year from the date it is created. The administrative value of most records is exhausted within two years.

ADMINISTRATIVE VALUE

The usefulness of a specific records series for the administration of current or future business.

ARCHIVAL RECORDS

Records which the State Archivist deems worthy of continued preservation based on historical value for reference and research purposes and which have been selected for transfer to the custody of the State Archives.

ARCHIVES

See Division of Archives and Records Service.

CASE FILES

See Project Files.

CFR

Code of Federal Regulations

CORRESPONDENCE

Letters, memorandums, notes, telecommunications, and any other form of addressed, written communications that are sent and received.

CUSTODY (OF RECORDS)

The guardianship of records that includes both physical possession and legal title.

CUT-OFF

The date or event which begins the retention period for a records series. Examples may include: Date of Document, Fiscal Year, School Year, When Superseded, Date of Report, etc.

DISPOSITION

Any manner or method of changing the custody, location, or physical state of records. Includes transfer, microfilming, duplication and destruction.

DISPOSITION AUTHORITY NUMBER (DAN)

The control number assigned to general records retention schedules and unique records retention schedules approved by the State Records Committee.

DIVISION OF ARCHIVES AND RECORDS SERVICE

Division of Archives and Records Service, a division of the Department of Administrative Services, was established by [Utah Code 63A-12-101](#).

DOCUMENT SCANNING

The process of converting paper, photographs or microfilm to a machine-readable format.

E-MAIL

E-mail is a means of sending or receiving information electronically, not a type of record. Information generated or received on an e-mail system needs to be managed according to the informational content of the message.

ELECTRONIC IMAGING SYSTEM (EIS)

An electronic document imaging system is a computer-based configuration of equipment and software that stores machine-readable document images and their associated character-coded index data for on-demand retrieval. Electronic images can be computer generated or created through document scanning.

ELECTRONIC RECORDS

Data or information that has been captured and fixed for storage and manipulation in an automated system and that requires the use of the system to render it intelligible by a person.

ESSENTIAL RECORDS

Public records, which are needed to protect assets, obligations and resources of state agencies, and are necessary to provide for the continuity, preservation and operation of state government.

FERPA

Family Educational Rights and Privacy Act

FISCAL VALUE

The usefulness of a specific records series for the documentation of an agency's financial transactions and obligations. Examples of records with primary fiscal value include budgets, allotments, ledgers, periodic accounting reports, vouchers, and warrants.

FOIA

Freedom of Information Act

GENERAL RETENTION SCHEDULE (GRS)

A schedule listing and assigning minimum retention periods to individual records series, which is approved for all state government agencies, or particular types of agencies, by the State Records Committee. General retention schedules provide the agencies they cover with continuing blanket authority for the disposition of commonly held records according to their assigned retention periods.

HIPAA

Health Insurance Portability and Accountability Act

HISTORICAL VALUE

Some records have long-term research value because they provide significant documentation concerning the development of the agency's mission, policies, programs, and the area(s) it serves through time. Once the agency's administrative, legal, and fiscal needs for such records have been exhausted they should be transferred to the State Archives for long-term preservation and public research use.

IDEA

Individuals with Disabilities Education Act

IMAGING

See Document Scanning.

INACTIVE RECORDS

Records with a reference rate of less than one search per file drawer per month. Such records may be transferred to an inactive records storage center.

INTERNET

A data communication network that -- is logically linked together by a globally unique address space based on the Internet Protocol (IP) or its subsequent extensions/follow-ons; -- is able to support communications using the Transmission Control Protocol/Internet Protocol (TCP/IP) suite or its subsequent extensions/follow-ons, and/or other IP-compatible protocols; and -- provides, uses or makes accessible, either publicly or privately, high level services layered on the communications and related infrastructure described herein.

INTRANET

An intranet is a network based on the Internet TCP/IP open standard. An intranet belongs to an organization and is designed to be accessible only by the organization's members, employees, or others with authorization. An intranet website looks and acts just like other websites, but has a firewall surrounding it to block unauthorized users. Intranets are used to share information.

INVENTORY

- A descriptive listing of records series held by an office or file station, including such data as title, inclusive dates, quantity, arrangement, relationships to other series, and description of significant subject content.
- A survey of records conducted prior to disposition or the development of a records retention schedule.

LEGAL VALUE

The usefulness of specific records series as documentation of an agency's legally enforceable rights and obligations.

MACHINE-READABLE RECORDS

Records in a medium or format that requires a mechanical and/or electronic device to make it intelligible to humans.

MICROFILM

A high-resolution photographic film used to record reduced-size images from original records.

PERMANENT RECORDS

Archival records that, because of their legal and/or historical value, should be retained without purging or sampling.

PRIMARY FILING CLASSIFICATION

The most general category under which records can be sorted and arranged for filing. Primary filing classifications should be defined by the function and retention requirements of the records.

PRIMARY RECORD COPY

The original or official copy of a record.

PROJECT (CASE) FILES

Groups of documents that pertain to a particular action, event, person, or place. May consist of correspondence, form records, memoranda, reports, or a combination of such records.

PROPRIETARY RECORDS

Records containing information of a confidential or highly sensitive nature requiring destruction by shredding, to eliminate the possibility of illegal or undesirable disclosure.

RECORD DUPLICATES

Records which are duplicates or have no administrative value and are authorized by the general schedule to be destroyed when no longer needed.

RECORDS

Records are recorded information, regardless of physical form. The term applies to any paper, correspondence, form, bound volume, film, magnetic medium, drawing or other document, regardless of form or physical characteristics, that has been created or received by any state agency during the course of business. All records are required to be maintained and disposed of by state agencies in accordance with the provisions of [Utah Code 63G-2-604](#).

- [63G-2-301, Public records](#)
- [63G-2-302, Private records](#)
- [63G-2-304, Controlled records](#)
- [63G-2-305, Protected records](#)

All records maintained in electronic format are included in this definition of a record and are governed under the terms of the Uniform Electronic Transactions Act. [Utah Code 46-4-301](#).

RECORDS CENTER

A centralized facility for the organized and controlled storage, maintenance, retrieval, and disposition of inactive or non-current records.

RECORDS MANAGEMENT

The management function concerned with the efficient, systematic control of records from their creation to their ultimate disposition.

RECORDS OFFICER

The individual responsible for an agency's records management procedures, including retention scheduling, files organization, records storage, and destruction.

RECORDS SERIES

A group of records, performing a specific function, which is used as a unit, filed as a unit and may be transferred or disposed of as a unit. A records series may consist of a single type of document or several different types of documents that are filed together as related to a specific function.

RECORDS SPECIALIST

Agency staff who assist the agency records officer with the records management duties of their department or division.

REFERENCE FILES

Publications, books, periodicals, catalogs, bulletins, reports, maps, thesis, tapes, films, photographs, and other materials that are needed as informational resources but are not part of the main body of files.

RETENTION PERIOD

The minimum amount of time required for the retention of a records series on an agency unique records retention schedule or state general records retention schedule approved by the State Records Management Committee.

SAMPLING

The documented archival process of selecting records from a collection to represent the collection as a whole and disposing of the remainder of the records.

SCANNING

See Document Scanning.

SCREENING

The process of reviewing records that are restricted, or may be restricted, because they contain information which is classified, confidential, or exempt from public disclosure.

SECONDARY FILING CLASSIFICATION

The second most general class of filing category under which records can be sorted or arranged for filing, subsidiary to primary classification.

SERIES SPECIFIC RETENTION SCHEDULE

A schedule, listing and assigning minimum retention periods to individual records series, which is approved for a specific agency by the State Records Committee. A records retention schedule provides the agency for which it is approved continuing records disposition authority.

STATE RECORDS MANAGEMENT COMMITTEE

- [Utah Code 63A-12-112](#)

STATUTE

A law enacted by the Legislature.

SUBJECT FILE

A file in which documents are arranged alphabetically by general subject or topic.

TRANSACTIONAL FILES

Records documenting the unique daily transactions or activities of an office that distinguish its primary functions.

TRANSITORY FILE

A file of routine correspondence and other records with short-term value. Its retention period is limited to the interval required for completion of specific actions covered by individual pieces of correspondence.

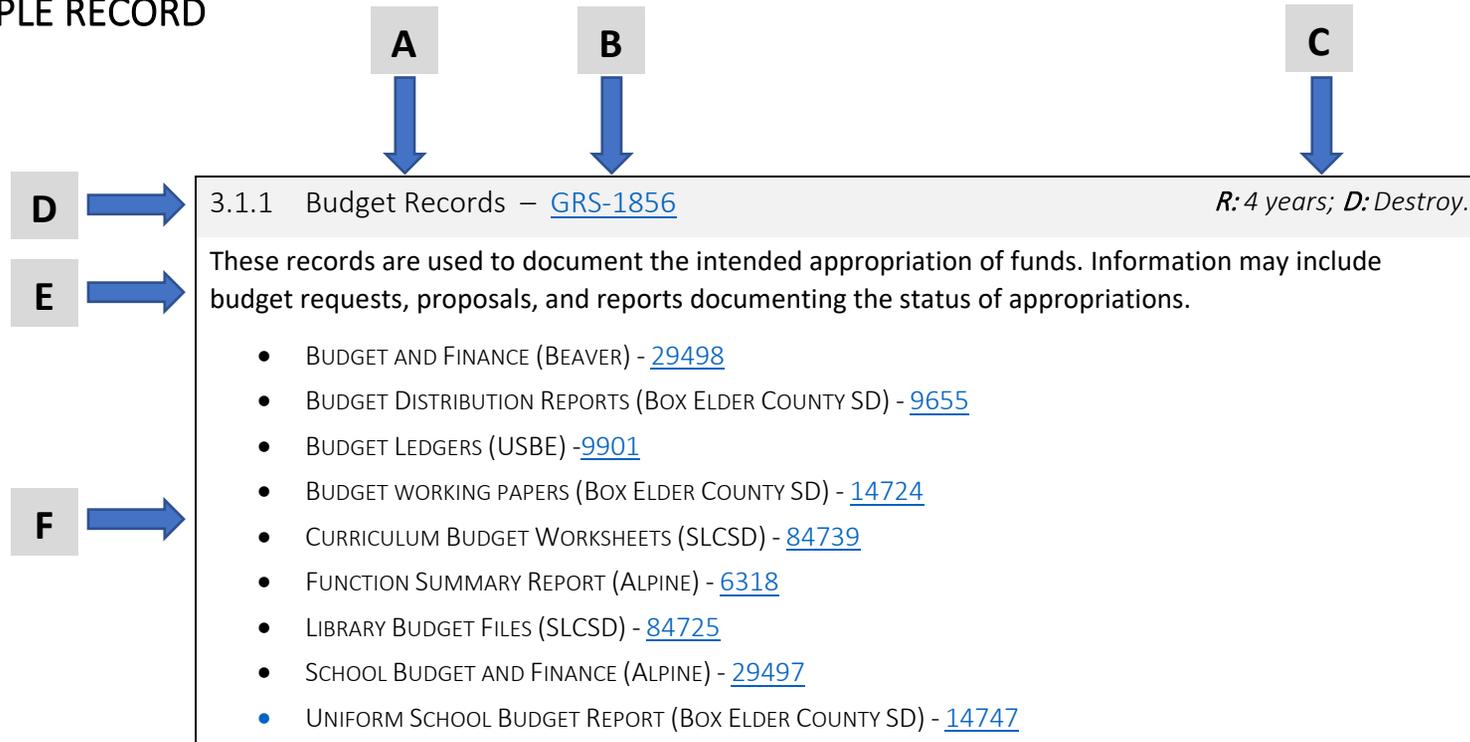
TRANSMITTAL

Documentation authorizing the disposal, transfers to inactive storage, or transfers to archival storage of public records.

WORKING FILE

A file of rough notes, calculations, or preliminary drafts that are assembled and used in the preparation or analysis of other documents; usually retained in desk files or filed separately until project is completed. Non-Record: Material that does not need to be filed or that can be destroyed after a short retention. This includes drafts, worksheets, routine replies, telephone messages, blank forms, publications, and extra copies of documents created for convenience or public distribution. (Example: Working File - A file of rough notes, calculations, or preliminary drafts that is assembled and used in the preparation or analysis of other documents. A working file is usually retained in desk files or filed separately until project completion.)

SAMPLE RECORD



3.1.1 Budget Records – [GRS-1856](#) *R: 4 years; D: Destroy.*

These records are used to document the intended appropriation of funds. Information may include budget requests, proposals, and reports documenting the status of appropriations.

- BUDGET AND FINANCE (BEAVER) - [29498](#)
- BUDGET DISTRIBUTION REPORTS (BOX ELDER COUNTY SD) - [9655](#)
- BUDGET LEDGERS (USBE) - [9901](#)
- BUDGET WORKING PAPERS (BOX ELDER COUNTY SD) - [14724](#)
- CURRICULUM BUDGET WORKSHEETS (SLCSD) - [84739](#)
- FUNCTION SUMMARY REPORT (ALPINE) - [6318](#)
- LIBRARY BUDGET FILES (SLCSD) - [84725](#)
- SCHOOL BUDGET AND FINANCE (ALPINE) - [29497](#)
- UNIFORM SCHOOL BUDGET REPORT (BOX ELDER COUNTY SD) - [14747](#)

A- Record- Recorded information, regardless of physical form. The term record applies to any paper, correspondence, form, bound volume, film, magnetic medium, drawing or other document, regardless of form or physical characteristics, that has been created or received by any state agency during the course of business.

B- General Record Series (GRS) - A schedule listing and assigning minimum retention periods to individual records series, which is approved for all state government agencies, or types of agencies, by the State Records Committee. General retention schedules provide the agencies they cover with continuing blanket authority for the disposition of commonly held records according to their assigned retention periods.

R: Retention; The minimum amount of time required for the retention of a records series on an agency unique records retention schedule or state general records retention schedule.

C- D: Disposition; Any manner or method of changing the custody, location, or physical state of records. Includes transfer, microfilming, duplication and destruction.

T: Transmittal; Documentation authorizing the disposal, transfers to inactive storage, or transfers to archival storage of public records.

D- Index Number- Records are indexed into a three-tier hierarchy. *First*, Primary Filing. *Second*, Secondary Filing. *Third*, Public Record Name.

E- Record Description- Description of the types of documents, instances, and guidance for a specific record series.

F- USBE/LEA Series Examples- [BUDGET WORKING PAPERS \(BOX ELDER COUNTY SD\) - 14724](#)

<i>Series Name</i>	<i>(LEA/SEA)</i>	<i>Series #</i>
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RECORDS APPRAISAL & MANAGEMENT PROGRAM

1. ADMINISTRATION MANAGEMENT

1.1 ADMINISTRATIVE RECORDS

1.1.1 Constitution and Bylaws – [GRS-43](#)

R: Permanently; T: Archives.

These are the charters, and constitution and bylaws of governing bodies. They establish the organization and operational procedures for the board. They usually include date of adoption and amendments, description and purpose of board, membership, description and responsibilities of board's positions, meeting frequency, voting procedures, explanation of what constitutes a quorum, and the establishment of procedural rules.

1.1.2 Oaths of Office – [GRS-1023](#)

R: Permanently; T: Archives.

These files contain copies of signed oaths required of all officials, whether elected or appointed, before entering the duties of their respective offices.

1.1.3 School Compliance Certification Forms – [GRS-1489](#)

R: 5 years; D: Destroy.

These records are submitted to the State Office of Education (USBE) in accordance with UCA 53A-3-403(4) (2004). Individual school principals submit information to the District which is then compiled and submitted to the USBE on school fee waivers. The forms include names of superintendent and school board president, district's fee schedule, fee policy, fee waiver policy, and community service policy.

- SCHOOL FEES COMPLIANCE CERTIFICATES (USBE) - [29864](#)

1.1.4 Administrative Hearing Records – [GRS-1655](#)

R: 5 years; D: Permanent; T: Archives.

Records of hearings held for various reasons including to regulate processes, change rules and policies, address the denial and revocation of licenses at the request of the public, or to discuss issues at the request of an executive body. Records may include meeting notices, proofs of publications, meeting minutes, the conclusions reached, and related correspondence.

- ADMINISTRATIVE SUBJECT RECORDS (DAVIS SD) - [10122](#)

1.1.5 Working Files – [GRS-1684](#)

R: 1 year; D: Destroy.

These records contain unique information in rough notes or drafts assembled or created and used to prepare or analyze other documents. The information adds proper understanding to the formulation and execution of policies, decisions, actions, or responsibilities.

- INVESTIGATION CASE FILES (SOUTH SUMMIT COUNTY SD) - [26738](#)

1.1.6 Proposed Legislation Records – [GRS-1690](#)*R: 5 years; D: Permanent; T: Archives.*

Records created by governmental agencies for the purpose of proposing legislation. They contain correspondence, memoranda, research information on proposed legislation, fiscal notes, summaries, estimated cost reports, impact statements, and other information documenting the proposed legislation.

- LEGISLATIVE PROGRAM MANUALS (USBE) - [84436](#)

1.1.7 Administrative Rule Records – [GRS-1692](#)*R: 6 years; D: Destroy.*

Information an agency relies upon when making a rule under the Utah Administrative Rulemaking Act, Title 63G, Chapter 3, including copies of "(a) the proposed rule, change in the proposed rule, and the rule analysis form; (b) the public comment received and recorded by the agency during the public comment period; (c) the agency's response to the public comment; (d) the agency's analysis of the public comment; and (e) the agency's report of its decision making process." (Subsection 63G-3-102(1)) Also may include records and other information used by agencies to support rulemaking decisions.

1.1.8 Information Governance Records – [GRS-1713](#)*R: Superseded or final action; D: Destroy.*

Records used in establishing and implementing records management policies, practices, and procedures. Included are inventories, finding aids, technological system data, and related information. Record destruction files, including destruction logs, are not included in this schedule.

- GRANT CONTROL FILES [GRS-1744](#)

1.1.9 Records Access Requests and Appeals – [GRS-1711](#)*R: 2 years after final action; D: Destroy.*

These records are access requests as provided under the Government Records Access and Management Act (GRAMA) (Utah Code 63G-2-204(2011)) or in accordance with a subpoena. Included with the access requests are any notices of denial, appeals or any other records related to the request.

1.1.10 Government Records Access and Management Act (GRAMA) Appeals Board Case Files – [GRS-1715](#)*R: Permanently; D: Archives.*

These files document all appeals submitted to records appeals boards. These case files include requests, denials, appeals, decisions, and any other documentation concerning the appeals process.

1.1.11 Legal Counsel Records – [GRS-1721](#)*R: Resolution; D: Destroy.*

These are legal interpretations given by attorneys at the request of governmental entities asking for guidance in enforcing, obeying, and/or interpretation of the law.

1.1.12 Formal Opinion Records – [GRS-1722](#)*R: Permanently; D: Archives.*

These are the formal legal opinions researched, written and published by attorneys. They are necessary to maintain consistency of opinion in related matters.

1.1.13 Petition Signature Records – [GRS-1729](#)*R: 22 months; D: Destroy.*

These records are petition signature sheets signed by individuals wishing to add a candidate or initiatives to the election ballot. Signatures are verified to determine whether petitioners are registered voters.

1.1.14 Submitted Petition Record – [GRS-1730](#)*R: 5 years after final action; D: Permanent; T: Archives.*

These records are formal petitions submitted to the legislative body proposing action. The legislative body submits the petition to legal voters in general or special election. Information may include a statement of purpose on proposed action, signatures and addresses of petitioners, designated sponsors, actions of the legislative body, and related records.

1.1.15 Investigation Records – [GRS-1733](#)*R: 7 years after case is closed; D: Destroy.*

These records contain information necessary to undertake a complete investigation and are used to identify patterns of behavior, investigate claims, conduct internal investigations, and for other investigative purposes. Records may relate to the initiation, investigation, and disposition of cases, but do not include investigations of employees, criminal activities, or worker's compensation, which have separate retention schedules.

- INVESTIGATIONS OF EDUCATORS OR EDUCATION ENTITIES CASE FILES (USBE) - [84370](#)
- LEGAL CASE FILES (DAVIS SD) - [11284](#)

1.1.16 Liability Risk Management Case Files – [GRS-2013](#)*R: 20 years; D: Destroy.*

Case files of the reporting, investigation, and settlement of liability claims filed against the governmental agency.

1.2 COMMITTEE - RECORDS, MEETING MINUTES & CORRESPONDANCE

1.2.1 State Government Routine Administrative Correspondence – [GRS-48](#)*R: 7 years; D: Destroy.*

Incoming and outgoing business-related correspondence, regardless of format or mode of transmission, created in the course of administering agency functions and programs. Administrative correspondence documents work accomplished, transactions made, or actions taken. This correspondence documents the implementation of agency functions rather than the creation of functions or policies. Business-related correspondence that is related to a core function with an associated retention schedule should follow the associated schedule.

1.2.2 Open Meeting Minutes and Public Materials – [GRS-1709](#)*R: Permanently; T: Archives.*

Approved minutes of an open meeting are the official record of the meeting of a public body. Contained in or with the minutes shall be the substance of all matters proposed, discussed or decided and votes taken (Utah Code 52-4-203(2014)). This includes the agenda, notices, and any public materials distributed at the meeting.

- ADMINISTRATIVE COUNCIL MINUTES (USBE) - [12980](#)
- BOARD GOVERNANCE RECORDS (GATEWAY PREP) - [29565](#)
- BOARD MINUTES AND POLICIES (NAVIGATOR PT.) - [28205](#)
- BOARD MOTIONS CARD FILE (SLCSD) - [84703](#)
- COMMITTEE MINUTES (SLCSD) - [3523](#)
- EXECUTIVE COMMITTEE MEETING MINUTES (USBE) - [12979](#)
- MINUTES AND SUPPORTING DOCUMENTS (USBE) - [1368](#)
- SCHOOL BOARD AGENDA (SLCSD) - [84769](#)
- SCHOOL ELECTION PROCEEDINGS TRANSCRIPTS (SLCSD) - [3381](#)
- SCHOOL LAND APPLICATIONS REGISTER (CARBON SD) - [3736](#)
- UTAH STATE EDUCATION STRATEGIC PLANNING COMMITTEE FILES (USBE) - [12954](#)

1.2.3 Closed Meeting Records – [GRS-1710](#)*R: Permanently; T: Archives.*

Recordings are required for the closed portion of meetings of a public body, except as provided by statute. The recording is the official record of a closed meeting (Utah Code 52-4-206(1)(a) and (2)(2014)).

1.2.4 Open Meeting Recordings – [GRS-1712](#)*R: 3 years after approval of written minutes; D: Destroy.*

Audio or video recordings document what transpired in open meetings of public bodies and are the official record of the meeting until and unless written meeting minutes are approved. Recordings used in place of written minutes in accordance with Utah Code 52-4-203(2)(b) are meeting minutes and are subject to the general retention schedule for open meeting minutes and public materials (GRS-1709), per Utah Code 52-4-203(6)(2018).

1.2.5 Transitory Tracking Records – [GRS-1720](#)

These records document transitory transactions. Information tracks services rendered, movement of people, materials, and includes internet website visitor information.

- ABSENTEE TALLY (DAVIS SD) - [10121](#)
- COMPUTER INVENTORY POSTING SUMMARY (SLCSD) - [84805](#)
- FOOD PRODUCT INFORMATION RECORDS (SLCSD) - [84814](#)
- MONTH END REPORTS (OGDEN SD) - [3850](#)
- MONTHLY RETIREMENT REPORT (MURRAY SD) - [692](#)
- MONTHLY SCHOOL REPORT (DAVIS COUNTY SD) - [85203](#)
- PROBLEM REQUISITIONS (SLCSD) - [84806](#)
- QUARTERLY PAYROLL REPORT (ALPINE SD) - [4214](#)
- SUBSTITUTION RECORD(SLCSD) - [84823](#)
- TEXTBOOK ORDERING RECORDS (DAVIS SD) - [10176](#)
- TREASURER'S OFFICE SUBJECT FILES (SLCSD) - [84914](#)
- WITHDRAWAL FILES (SLCSD) - [84721](#)

1.2.6 Executive Internal Committee Records – [GRS-1726](#)*R: Permanently; T: Archives.*

These records document meetings of boards, committees, or teams that have no statutory authority to make public policy decisions but do have authority to make internal policy decisions. Information includes the determinations and actions of the meeting.

1.2.7 Internal Committee Records – [GRS-1725](#)*R: Resolution of issue; D: Destroy.*

These records document meetings of boards, committees, or teams that have no statutory authority to make public policy decisions. Information includes implementation of projects, programs or operational matters.

- COMMITTEE FILES (SLCSD) - [84837](#)
- EQUAL EMPLOYMENT OPPORTUNITY FILES(DAVIS SD) - [11283](#)
- TEXTBOOK ADOPTION CONTROL NOTEBOOKS (SLCSD) - [84787](#)

1.2.8 State Agency Executive Correspondence – [GRS-1758](#)*R: 5 years after separation; D: Permanent; T: Archives.*

Incoming and outgoing business-related correspondence, regardless of format or mode of transmission, that provides unique information relating to the functions, policies, procedures or programs of a state agency. These records document executive decisions made regarding agency interests. Executive decision makers may include the Director, Chief Administrative Officer, Public Information Officer or other internal administrators as identified by the executive office.

- SUPERINTENDENT'S FILES (OGDEN SD) - [28849](#)

1.2.9 Transitory Correspondence – [GRS-1759](#)

Incoming and outgoing correspondence, regardless of format or mode of transmission, related to matters of short-term interest. Transmittal correspondence, including email, is transitory unless part of another process. This correspondence does not impact agency functions. When resolved, there is no further use or purpose.

- CORRESPONDENCE FILES (SLCSD) - [84835](#)
- SCHOOL DISTRICT CORRESPONDENCE (USBE) - [1334](#)
- TELEPHONE CALLING TAPES (SLCSD) - [84574](#)

1.2.10 Local Government Routine Administrative Correspondence – [GRS-1760](#)*R: 3 years; D: Destroy.*

Incoming and outgoing business-related correspondence, regardless of format or mode of transmission, created in the course of administering agency functions and programs. Administrative correspondence documents work accomplished, transactions made, or actions taken. This correspondence documents the implementation of agency functions rather than the creation of functions or policies. Business-related correspondence, including email, that is related to a core function with an associated retention schedule should follow that associated schedule.

- SUPERINTENDENT'S EXECUTIVE CORRESPONDENCE (USBE) - [12981](#)

1.3 PROGRAM APPLICATIONS, EVALUATIONS & STATISTICAL RECORDS

1.3.1 Project Management Records – [GRS-21](#)*R: 1 year; D: Destroy.*

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

1.3.2 Feasibility Studies – [GRS-746](#)*R: 5 years after completion of report; D: Destroy.*

These records are created and used in the development, redesign, modification of, or migration of data from, a technological system or application. Information includes project management records, status records, status reports, scope of work, analyses, and related records.

1.3.3 Block History Monthly Reports – [GRS-1390](#)*R: Superseded; D: Destroy.*

These monthly reports provide geographic projections on student enrollment. They are printed as needed and are used for future planning. The reports contain the number of people living on each block (or grid) within city or county and the number of school age per block (or grid).

- BLOCK HISTORY MONTHLY REPORTS (SLCSD) - [84641](#)

1.3.4 Program and Policy Development Records – [GRS-1717](#)*R: 3 years after final action; T: Archives.*

These records are created by executive decision-makers to document the establishment and dissemination of agency programs, policies, and procedures. Executive decision-makers may include the Chair, Director, Chief Administrative Officer, Public Information Officer, Commissioner, Mayor, or other internal administrators as identified by the executive office. Related correspondence and email are included.

- POLICIES AND PROCEDURES (BEAVER SD) - [29526](#)
- SCHOOL EVALUATIVE CRITERIA MANUALS (USBE) - [84422](#)
- SCHOOL TRANSPORTATION REPORTS (USBE) - [84424](#)

1.3.5 Miscellaneous Series

R: Permanent; T: Archives.

- SCHOOL FINANCE STUDY RECORDS (USBE) - [1960](#)
- SCHOOL COST STUDY DATA (USBE) - [1896](#)
- UTAH SOCIAL SERVICE QUESTIONNAIRES (USBE) - [1827](#)

1.4 PUBLICATIONS, REPORTS, & COMMUNITY RELATIONS

1.4.1 Public Relations Records – [GRS-1716](#)*R: Permanent; T: Archives.*

These records, regardless of format or mode of transmission, are created for distribution to the news media or public. Records include speeches, press releases, public announcements or similar records.

- PUBLIC RELATIONS RECORDS (SLCSD) - [84658](#)

1.4.2 Public Information Files – [GRS-2001](#)*R: 1 year after end of project or program; D: Destroy.*

These are files of information which an agency collects on a particular topic and which relate to the agency's interaction with the public. Contents may include newspaper clippings, public opinion polls, studies and reports, or any other materials collected topically to assist the agency.

- PUBLIC INFORMATION RECORDS (SLCSD) - [84781](#)

1.4.3 Higher Education Sponsored Research Records – [GRS-2040](#)*R: 6 years after final action; D: Destroy.*

These record document sponsored research conducted by staff and student body. The educational institution ensures the work is managed and financed, consistent with applicable laws and regulations, and findings are disseminated.

1.4.4 Annual or Official Reports – [GRS-3](#)

These are official reports summarizing activities and accomplishments of a governmental entity or program which are produced and distributed. They may include statistics, narrative reports, graphics, and diagrams.

- ACCREDITATION REPORTS (OGDEN SD) - [28852](#)
- ANNUAL STATISTICAL REPORT (BOX ELDER SD) - [14750](#)
- CRITICAL ISSUES AFFECTING EDUCATION REPORTS (USBE) - [10631](#)
- CURRICULUM REPORTS (USBE) - [4969](#)
- DESIGNING EDUCATION FOR THE FUTURE PROJECT REPORTS (USBE) - [84398](#)
- EDUCATION CONFERENCE REPORTS (USBE) - [10679](#)
- EDUCATIONAL RESEARCH BULLETINS (USBE) - [84850](#)
- MINORITY EDUCATION REPORTS (USBE) - [3349](#)
- SCHOOL DISTRICT EVALUATION REPORTS (USBE) - [84629](#)
- SCHOOL FINANCE REFERENCE MANUALS (USBE) - [10816](#)
- SCHOOL LEARNING AND NURTURING DEVELOPMENT TRUST PROGRAM ANNUAL REPORTS (USBE) - [29911](#)
- SPECIAL REPORTS (SLCSD) - [84665](#)
- STATEWIDE EDUCATIONAL ASSESSMENT REPORT (USBE) - [10886](#)
- SUPERINTENDENT'S ITEMS HANDBOOK (USBE) - [84854](#)
- TITLE I REPORTS - ELEMENTARY AND SECONDARY EDUCATION ACT OF 1965 (USBE) - [85317](#)
- TITLE III REPORTS - ELEMENTARY AND SECONDARY EDUCATION ACT OF 1965 (USBE) - [85315](#)
- WEEKLY BULLETIN (DAVIS COUNTY SD) - [10178](#)

1.4.5 Publications – [GRS-1678](#)

Any record of enduring value, regardless of format or platform, that is disseminated by a governmental entity for public distribution. These may include website content, printed publications, newsletters, social media posts, and similar records.

See Utah Code Section 9-7-101(7)(2017) and 9-7-208(4)(2006).

- ALCOHOL, TOBACCO, AND DRUG REPORTS (USBE) - [10657](#)
- ANNUAL REPORT (USBE) - [29609](#)
- BULLETINS (USBE) - [84405](#)
- CAREER AND TECHNICAL EDUCATION ANNUAL EVALUATION REPORTS (USBE) - [10656](#)
- CIRCULAR OF PUBLIC SCHOOLS (SLCSD) - [24987](#)
- CONTRACT AGREEMENT PAMPHLETS (SLCSD) - [84788](#)
- CORE CURRICULUM STANDARDS REPORTS (USBE) - [10728](#)
- DINÉ LANGUAGE MATERIALS CATALOG (SAN JUAN COUNTY SD) - [28790](#)
- DIRECTORIES (BOX ELDER SD) - [14730](#)
- FEDERAL AND STATE PROGRAM FUNDS FOR PUBLIC EDUCATION CATALOGS (USBE) - [84377](#)
- INSCRIPTIONS (SLCSD) - [84982](#)
- LITERACY AND ENGLISH AS A SECOND LANGUAGE RESOURCE DIRECTORY (USBE) - [84393](#)
- NEWSLETTERS (SLCSD) - [23510](#)
- OPTIONAL PROGRAM INFORMATION PAMPHLETS (SLCSD) - [84650](#)
- PUBLICATIONS (USBE) - [1348](#)
- RESOURCE UNIT MANUALS (WEBER SD) - [1313](#)
- SCHOOL BUILDING CONSTRUCTION AND INSPECTION RESOURCE MANUALS (USBE) - [23943](#)
- SCHOOL BUILDINGS IN UTAH REPORTS AND SUPPLEMENTS (USBE) - [84439](#)
- SCHOOL DISTRICT CONSOLIDATION AND BOUNDARY CHANGE FEASIBILITY STUDIES (USBE) - [84421](#)
- SCHOOL DISTRICT PERFORMANCE REPORTS PREPARATION HANDBOOKS (USBE) - [19989](#)
- STATEWIDE TESTING PROGRAM REPORTS (USBE) - [20377](#)
- SUPERINTENDENT'S OPINIONS (USBE) - [412](#)
- TITLE V REPORTS - HIGHER EDUCATION ACT OF 1965 (USBE) - [85311](#)

2. ASSET MANAGEMENT

2.1 OPERATIONS, BUILDINGS, GROUNDS & MAINTENANCE

2.1.1 Property Maintenance and Repair Records – [GRS-111](#)

R: 2 years; D: Destroy.

These records document service repair and maintenance of government property. Information includes the request, work order, authorization, work logs, verification of work done, and related records.

2.1.2 School Building Inspection Records – [GRS-598](#)

R: 6 years; D: Destroy.

These files document the inspections conducted by the local health agency to ensure that the school buildings and premises are safe for use by the students and school personnel. This is part of the local health agencies duties as set out in UCA?? 26A-1-114(3) (2011). These inspection forms include school district's name, school type, school's name, enrollment statistics, number of class and work rooms, inspection date, inspector's name, inspector's remarks, and the results of the inspection of the grounds, school rooms, floors, walls, ceilings, chalkboards, heating, ventilation, lighting, seating, water supply, hand washing facilities, toilet facilities, locker facilities, shower rooms, and waste disposal.

2.1.3 Contract and Lease Records – [GRS-1731](#)

R: 7 years after expiration of contractual agreement; D: Destroy.

These records document contractual agreements for property use, products or services. Records may include requirements and terms, and the signed contract. Contractor payroll records are included.

- NEGOTIATION FILES (DAVIS SD) - [11285](#)
- RENTAL AGREEMENT FILES (OGDEN SD) - [84188](#)
- SALARY NEGOTIATION RECORDS (SLCSD) - [84663](#)
- SCHOOL FACILITIES REQUESTS (DAVIS COUNTY SD) - [10142](#).

2.1.4 Operational Procedure and Guideline Records – [GRS-1732](#)

R: 2 years after superseded; D: Destroy.

These records document actions taken to achieve objectives and implement policies through day to day operations. They govern routine business activities that do not impact the rights of an individual.

- PROCEDURES MANUAL (SLCSD) - [84679](#)
- SCHOOL BOARD GUIDELINES AND INDEXES (SLCSD) - [84672](#)

2.1.5 Disaster Plan Records – [GRS-2022](#)

R: Superseded; D: Destroy.

Disaster plans for records and office operations ensure that essential government functions continue to be performed following natural disasters, accidents, technical, or attack related emergencies. Information includes plans for restoring operations and protecting facilities and resources. Disaster recovery training materials may be included.

2.1.6 Cartographic Records – [GRS-1747](#)*R: Permanent; T: Archives.*

Cartographic records which contain the officially designated record copy of maps created by an agency. These records document unique cartographic information about the state of Utah. They may include maps, charts, geospatial data sets, aerial photographs, globes, models, and raised relief maps. These are a graphic representation of the earth's surface drawn to scale.

- SCHOOL DISTRICT MAPS (USBE) - [5848](#)

2.1.7 Government Construction As-Built Plans and Specifications – [GRS-1789](#)*R: Final action; D: Permanent; T: Archives.*

Final plans and specifications for approved and constructed buildings, facilities, roads, and bridges. Documents construction of new buildings, facilities, and infrastructure as well as renovation of owned buildings and rented buildings.

2.1.8 Deed Records – [GRS-735](#)*R: Permanent; T: Archives.*

These records are deeds and conveyances of real estate owned by governmental entities. Included are the original deeds, titles, insurance and tax information.

- DEEDS AND ABSTRACTS OF TITLES (BOX ELDER COUNTY SD) - [14731](#)

2.2 AUDITING, EQUIPMENT & INVENTORY

2.2.1 Fixed Asset Records – [GRS-73](#)*R: 10 years after disposition of asset; D: Destroy.*

These records relate to tangible assets such as property and equipment owned by a governmental entity. Information includes substantiation, purchases, depreciation, inventories, and related records.

- FIXED ASSET REPORT (MURRAY CITY SD) - [707](#)

2.2.2 Shelf List – [GRS-520](#)*R: Final action; D: Destroy.*

This is the master inventory of all library holdings currently in the library collection. Traditionally the record was a card file which was arranged by shelf or classification number but has now largely been computerized. This master inventory is constantly being changed as materials are added and withdrawn from the collection. It includes classification number (or call number), author, title, and number of copies.

- ELEMENTARY SCHOOL LIBRARY LIST (USBE) - [84618](#).

2.2.3 Program and Project Analysis Records – [GRS-1277](#)*R: 10 years; D: Destroy.*

These records document research studies, program analyses, project assessments, etc. conducted by or on behalf of governmental entities in order to inform decisions regarding proposed or existing programs or projects. Information includes working papers, correspondence, findings, recommendations, and related records. The final reports are not included in this schedule.

2.2.4 Equipment Inventories Files – [GRS-1302](#)*R: 1 year; D: Destroy.*

These files contain the annual inventory of equipment, supplies and other items owned or administered by the governmental entity.

- INVENTORY CARDS (SLCSD) - [84804](#)

2.2.5 Inventory Records – [GRS-1360](#)*R: 1 year; D: Destroy.*

These records are used to maintain an inventory of supplies and equipment previously purchased by the district and their suppliers. Information includes item number, item description, names of suppliers, stock on hand, and ordering information.

2.2.6 Audit Records – [GRS-1727](#)*R: 10 years; D: Permanent; T: Archives.*

These are studies and reports prepared and produced as a result of an internal or external performance audit of an entity. Performance audit records summarize an entity's programs, operations, productivity, and compliance with applicable rules and laws.

- ANNUAL AUDIT (KANE COUNTY SD) - [24258](#)
- INTERNAL AUDIT REPORTS (USBE) - [28861](#)

2.2.7 Audit Work Papers – [GRS-1728](#)*R: 10 years; D: Destroy.*

These records contain the audit results and evidence supporting the final report and provide a link between the field work and the auditor's report. Work papers collected during the course of the audit include financial statements, client-prepared documents, analysis, data, and correspondence which documents the performance of audits and their conclusions.

- INTERNAL AUDIT WORK PAPERS (USBE) - [22660](#)
- PUBLIC LAW 874 FILES (SLCSD) - [84654](#).

2.2.8 Audited Financial Statements – [GRS-1857](#)*R: 4 years; D: Permanent; T: Archives.*

The budget is a plan for financial operations for a fiscal year. It documents the actual spending of a governmental entity and may be certified by a budget officer and filed with the state auditor.

- ANNUAL BUDGET (BOX ELDER COUNTY SD) - [14723](#)
- BUDGET AND APPROPRIATION REQUESTS (USBE) - [3269](#)
- UTAH SCIENCE TECHNOLOGY AND RESEARCH PROGRAM BUDGET REPORTS (USBE) - [28512](#)

2.2.9 Supply Management Files – [GRS-1987](#)*R: 2 years; D: Destroy.*

Files of reports on supply requirements and procurement matters submitted for supply management purposes (other than those incorporated in case files or other files of a general nature).

2.2.10 Insurance Claim Records – [GRS-2010](#)*R: 12 years; D: Destroy*

These records document coverage or compensation for a covered loss. Records may include validated claims and payments issued.

2.3 TRANSPORTATION

2.3.1 Vehicle Usage Report – [GRS-109](#) *R: 3 years; D: Destroy.*

This is a report of private and government vehicle usage. It is used for both maintenance and planning purposes. Information includes date, list of repairs needed and action taken, miles traveled, problems, and driver's name.

2.3.2 Fuel Records – [GRS-112](#) *R: 2 years; D: Destroy.*

These are logs, reports, or similar records documenting mileage and gasoline, oil, and diesel fuel purchased or used.

2.3.3 Vehicle Assignment Records – [GRS-116](#) *R: 1 year; D: Destroy.*

These are assignment logs, reports, authorizations, and similar records relating to the assignment and use of vehicles by employees or officials. .

2.3.4 Bus Transportation Request – [GRS-1516](#) *R: 2 years; D: Destroy.*

This form is used to request buses for special activities and school trips. The school retains a copy of the form and submits a copy to the district's Transportation Department. These requests are submitted prior to the activity (per district policy) for bus scheduling and driver's assignment. The form includes date, requesting school, destination, date needed, projected departure and return times, nature of trip, and approval signatures.

2.3.5 Bus Transportation Rules and Regulations – [GRS-1517](#) *R: 1 year; D: Destroy.*

These rules and regulations document parents'/guardian's receipt and approval of acceptable student behavior on school buses. They are sent home at the beginning of each school year to inform parents of the district policies. One copy is retained by the parents for reference while a signed copy is returned to the school where it is retained on file. They include the rules and regulations, parents' and students' signatures, and date.

2.3.6 Vehicle Maintenance Records – [GRS-1873](#) *R: 3 years after disposition of asset; D: Destroy.*

These records document the inspection, repair and maintenance of government-owned vehicles. Information includes vehicle identification, usage, and related records. .

3. FINANCIAL MANAGEMENT

3.1 BUDGET & ACCOUNTING

3.1.2 Local Government Accounts Payable and Receivable Records – [GRS-106](#)

R: 4 years; D: Destroy.

These are records related to monies collected, paid, or invested in the conduct of business. Information may include bank records, invoices, revenue, expenses, and related accounting records. Trust records are not included.

- ACCOUNTS PAYABLE (PROVO CITY SD) - [7423](#)
- BALANCE SHEET REPORT (ALPINE SD) - [6316](#)
- CHECK STUBS (SLCSD) - [84991](#)
- DAILY SALES REPORT (DAVIS COUNTY SD) - [10129](#)
- GENERAL JOURNAL REPORT (MURRAY CITY SD) - [705](#)
- INVOICE REPORT (ALPINE) - [4185](#)
- JOURNAL ENTRY REPORT (BOX ELDER COUNTY SD) - [9658](#)
- MONTHLY ACCOUNTING PRINTOUTS (SLCSD) - [84664](#)
- MONTHLY FINANCIAL REPORTS (MURRAY CITY SD) - [688](#)
- MONTHLY LUNCH REPORT (DAVIS COUNTY SD) - [10134](#)
- MONTHLY RECEIPT LISTING REPORT (DAVIS COUNTY SD) - [10135](#)
- OBJECT REPORT (ALPINE) - [6317](#)
- PAYROLL MONTHLY PAYROLL DEDUCTION BILLINGS (BOX ELDER SD) - [14759](#)
- PETTY CASH CHECKS (SLCSD) - [84811](#)
- PROGRAM OBJECT REPORT (ALPINE SD) - [4224](#)
- RECEIPT BOOKS (SLCSD) - [84929](#)
- RECEIPT REPORTS (OGDEN SD) - [3995](#)
- SCHOOL FOOD SERVICES MONTHLY MEALS PAYMENT REPORT (BOX ELDER COUNTY SD) - [14736](#)
- TRANSACTION SUMMARY REPORT BY PROGRAM (MURRAY CITY SD) - [689](#)
- VOCATIONAL TEACHER ACCOUNT FILES (SLCSD) - [84973](#)
- VOIDED CHECKS REPORT (OGDEN SD) - [4030](#)

3.1.3 Notary Bond Files – [GRS-35](#)*R: 1 year after final action; D: Destroy.*

These files document employees providing service to county agencies as notaries public. They include valid certificates, copies of bonds, and any related correspondence.

3.1.4 General Obligation Bonds – [GRS-57](#)*R: 1 year after resolution of issue; D: Destroy.*

These issued bonds are not payable solely from revenues other than those derived from ad valorem taxes. They constitute a full general obligation of the governmental entity for the prompt and punctual payment of principal and interest. The revenue derived from the sale of bonds shall be applied only to the purpose specified in the order of the legislative body (Utah Code 17-17-1 (2019)).

- GENERAL OBLIGATION BONDS (BOX ELDER COUNTY SD) - [14726](#)

3.1.5 Bond Anticipation Notes – [GRS-782](#)*R: 1 year; D: Destroy.*

These are notes used by local government agencies pursuant to an appropriation resolution for bonds in anticipation of payable ad valorem taxes and constitute a full obligation of the entity.

3.1.6 Bond Redemption and Destruction Certificates – [GRS-787](#)*R: 3 years after final action; D: Destroy.*

These are certificates sent to the municipality by the paying agent which track pay and destruction of bond coupons.

3.1.7 Surety Bonds – [GRS-789](#)*R: 4 years after final action; D: Destroy.*

These are fidelity bonds or proof of insurance payable to the governmental entity conditioned for the faithful performance of the duties of the respective officers. Bonds are placed at such amounts as may be determined by the governing body (Utah Code 10-3-819 (1987) and Utah Code 17-16-11(2007)).

3.1.8 School Bond Issue Files – [GRS-1285](#)*R: 10 years after final action; D: Destroy.*

These files document the implementation of significant school district bonds. These files include authorizations supporting financial data, contracts or sales agreements, destruction certificates, and sample copies of bonds sold as evidence of school district indebtedness.

3.1.9 Bond Registration Files – [GRS-1288](#)*R: 3 years after final action; D: Destroy.*

These are the issuing agent's copies of bond registration stubs.

3.1.10 Tax Rate Summary Sheets – [GRS-1298](#)*R: 2 years; D: Destroy.*

These report forms are submitted to the county auditor reporting on desired tax levies for property taxes. They include proposed tax rate worksheet, tax rate summary, a certified tax rate worksheet, and a budget affidavit.

- TAX RATE SUMMARY SHEETS (BOX ELDER COUNTY SD) - [14725](#)

3.1.11 School General Ledgers – [GRS-1316](#)*R: 10 years; D: Destroy.*

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

- GENERAL LEDGERS (ALPINE) - [4183](#)
- YEAR-END REPORTS (ALPINE)- [26505](#)

3.1.12 Real Property Files – [GRS-1403](#)*R: Permanently; T: Archives.*

These records document the transfer of ownership of real estate to or from a governmental entity whether by trade, sale, acquisition, transfer, donation, or other means.

- SCHOOL REAL PROPERTY RECORDS (SLCSD) - [84503](#)

3.1.13 Bond Official Transcripts – [GRS-1799](#)*R: 5 years after final action; D: Permanent; T: Archives.*

Official files regarding authority to issue bonds (general obligation or revenue). Records may include Indenture of Trust, leases, authorizing resolutions, offering documents, certificates, specimen bonds, etc.

3.1.14 Bonds, Notes & Interest Payments – [GRS-1801](#)*R: 3 years after final action; D: Destroy.*

These are critical bond documents that are used for the life of bills, notes, debt securities, debt obligations, or bonds. Included are book entries, statements and payment confirmations, application and certificate for eligibility, and related records.

- BOND STATEMENTS (SUMMIT ACADEMY) - [28534](#)

3.1.15 State Performance Bonds – [GRS-1819](#)*R: 7 years after resolution of issue; D: Destroy.*

Bonds made payable to the state conditional to the performance of all activity requirements and state and federal law.

3.1.16 Refund Requests – [GRS-1824](#)*R: 3 years; D: Destroy.*

These are forms signed by customers requesting a refund of monies paid to the entity.

3.1.17 Reimbursement Files – [GRS-1833](#)*R: 3 years; D: Destroy.*

These records document payments made for the purpose of reimbursing travel, transportation, equipment, service, training, tax abatement, and other reimbursable costs. Records may include correspondence, forms, travel reservations, travel authorizations, per diem vouchers, transportation requests, hotel reservations, invoices, itemized expenses, participation verification, and other supporting records used to validate reimbursable expenses.

- REIMBURSEMENT INFORMATION FILES (SLCSD) - [84720](#)
- SCHOOL FOOD SERVICES MONTHLY REIMBURSEMENT CLAIM (BOX ELDER COUNTY SD) - [15201](#)

3.1.18 Trust Financial Records – [GRS-1858](#)*R: 7 years after final action; D: Destroy.*

These are records related to monies handled under the terms of a trust. Information may include property taxes, insurance premiums, mortgage and related records.

3.1.19 State Government Accounts Payable and Receivable Records – [GRS-1854](#)*R: 7 years; D: Destroy.*

These are records related to monies collected or paid in the conduct of business. Information may include bank records, invoices, revenue, expenses, and related accounting records. Trust records are not included.

- BANK, FACILITY, AND RISK MANAGEMENT (LAKEVIEW ACADEMY) - [29751](#)
- BANK, FACILITY, AND RISK MANAGEMENT RECORDS (MOAB CHARTER) - [28215](#)
- DETAIL BY DIVISION REPORT (USBE) - [83743](#)
- MONTHLY FEE COLLECTION REPORT (DAVIS COUNTY SD) - [10137](#)
- PROJECT REPORT (USBE) - [83741](#)
- RECIPIENT REPORT (USBE) - [83740](#)

3.1.20 Budget Records – [GRS-1856](#)*R: 4 years; D: Destroy.*

These records are used to document the intended appropriation of funds. Information may include budget requests, proposals, and reports documenting the status of appropriations.

- BUDGET AND FINANCE (BEAVER) - [29498](#)
- BUDGET DISTRIBUTION REPORTS (BOX ELDER COUNTY SD) - [9655](#)
- BUDGET LEDGERS (USBE) - [9901](#)
- BUDGET WORKING PAPERS (BOX ELDER COUNTY SD) - [14724](#)
- CURRICULUM BUDGET WORKSHEETS (SLCSD) - [84739](#)
- FUNCTION SUMMARY REPORT (ALPINE) - [6318](#)
- LIBRARY BUDGET FILES (SLCSD) - [84725](#)
- SCHOOL BUDGET AND FINANCE (ALPINE) - [29497](#)
- UNIFORM SCHOOL BUDGET REPORT (BOX ELDER COUNTY SD) - [14747](#)

3.1.21 Miscellaneous Series

R: 4 years; D: Destroy.

- ACCOUNTS RECEIVABLE (ALPINE) - [27530](#)
- RECEIPT DISTRIBUTION REPORT (CARBON COUNTY SD) - [24199](#)

3.2 PURCHASING3.2.1 Vendor List – [GRS-190](#)*R: Superseded; D: Destroy.*

This is a list of vendors providing goods and services to the governmental entity. It usually includes names of vendors, addresses, phone numbers, and descriptions of goods or services provided.

- VENDOR LIST (BOX ELDER COUNTY SD) - [14685](#)

3.2.2 Equipment Standards Guide – [GRS-1253](#)*R: 1 year; D: Destroy.*

These are standards developed for equipment purchases. They are used to ensure the most efficient expenditure of district funds. The standards are normally organized by subject and include an item-by-item description, estimated or guaranteed price, and quantity allowed.

- EQUIPMENT STANDARDS AND PLANNING GUIDELINES (SLCSD) - [84695](#)

3.2.3 Prior Payment Report – [GRS-1364](#)*R: 3 years; D: Destroy.*

This report lists all payments made to individual vendors. The report includes vendor number and name, 1099 flag (for purchases over \$600 which require an Internal Revenue Service form), purchase order number, invoice number, account number, check number, and check date.

3.2.4 Purchase Orders and Requisition Records – [GRS-1544](#)*R: 4 years; D: Destroy.*

These records document the purchase of equipment and other materials made by a governmental entity. They are used as a planning tool and for verification purposes. Information includes a description of the item being ordered, requesting agency, name of vendor, delivery and payment details.

- PRICE QUOTATION RECORDS(SLCSD) - [84813](#)
- PURCHASE ORDER (BOX ELDER SD) - [14686](#)
- PURCHASE ORDERS AND REQUISITION RECORDS (DAVIS COUNTY SD) - [10140](#)
- PURCHASING RECORDS (OGDEN PREPARATORY ACADEMY) - [28462](#)
- REQUISITIONS (BOX ELDER COUNTY SD) - [14688](#)
- TEXTBOOK CATALOGS AND ORDER FORMS (SLCSD) - [84713](#)
- WAREHOUSE PURCHASE REQUISITIONS (DAVIS SD) - [11292](#)

3.2.5 Approved Vendor List – [GRS-1975](#)*R: 1 year after superseded; D: Destroy.*

Lists of vendors and consultants who are eligible for contracting with the governmental entity to provide products or services.

3.2.6 Request for Proposal Records – [GRS-1991](#)*R: 6 years after end of project or program; D: Destroy.*

These records are bids and proposals to provide products or services for a governmental entity. Information includes preliminary requirements for procurement of a commodity or service.

- BID FILES (SLCSD) - [84767](#)

3.3 PAYROLL

3.3.1 Timekeeping Records – [GRS-1902](#)*R: 3 years; D: Destroy.*

Description Information regarding hours worked, paid or unpaid permitted absence from work for family emergency, sickness, personal time, vacation, or other reasons as outlined by policy are included in this schedule.

- EMERGENCY AND OTHER PERSONAL LEAVE FILES [GRS-889](#)
- HOURLY PAY RECORDS (SLCSD) - [84718](#)
- LEAVE OF ABSENCE REQUESTS (DAVIS SD) - [11289](#)
- PAYROLL ABSENCE REPORT RECORD (BOX ELDER COUNTY SD) - [14676](#)
- PAYROLL FIVE YEAR LEAVE DATA SHEET (BOX ELDER COUNTY SD) - [14677](#)
- TIMESHEET CARDS (DAVIS COUNTY SD) - [85208](#)

3.3.2 Payroll Processing Records – [GRS-1903](#)*R: 3 years; D: Destroy.*

These records verify compensation data for each employee, including salary, hourly rate and type of pay. Deductions are confirmed in processing payroll before employees are paid.

- ADMINISTRATIVE PAYROLL REPORTS (HAWTHORN ACADEMY) - [28634](#)
- CLEANUP REPORT (OGDEN SD) - [83514](#)
- DEDUCTION REGISTER (ALPINE) - [27496](#)
- DISTRIBUTION REPORTS (MURRAY CITY SD) - [690](#)
- EMPLOYEE CHECK DETAIL LISTING REPORT (ALPINE SD) - [6319](#)
- FICA REPORT (OGDEN SD) - [3889](#)
- LOCATION PAYROLL REGISTER (OGDEN SD) - [83512](#)
- MONTHLY CERTIFIED EMPLOYEES PAYROLL REPORT (OGDEN SD) - [3807](#)
- PAYROLL ABSENCE SUMMARY REPORT (BOX ELDER COUNTY SD) - [14672](#)
- PAYROLL DATA RECORD (OGDEN SD) - [83508](#)
- PAYROLL DEDUCTION ANNUITY AUTHORIZATION FILE (BOX ELDER COUNTY SD) - [14678](#)
- PAYROLL DEDUCTION REPORTS (DUCHESNE COUNTY SD) - [10540](#)
- PAYROLL DISTRIBUTION REPORT (DUCHESNE COUNTY SD) - [10572](#)
- PAYROLL GARNISHMENTS (BOX ELDER COUNTY SD) - [14680](#)
- PAYROLL INCOME TAX EXEMPTIONS AND WITHHOLDING FILES (BOX ELDER COUNTY SD) - [14746](#)
- PAYROLL RETIREMENT REPORTS (BOX ELDER COUNTY SD) - [14751](#)
- PAYROLL SHEET (DAVIS COUNTY SD) - [10138](#)
- PAYROLL TAX REPORT (DUCHESNE COUNTY SD) - [10541](#)
- PAYROLL TAX WAGE AND EARNING REPORTS (BOX ELDER COUNTY SD) - [14755](#)
- PAYROLL VOUCHER (BOX ELDER COUNTY SD) - [14673](#)
- PERSONNEL ACTION RECORDS (BOX ELDER COUNTY SD) - [14671](#)
- RETIREMENT EXCEPTIONS REPORT (CACHE COUNTY SD) - [11968](#)
- STATE AND FEDERAL TAX WITHHOLDING REPORT (ALPINE SD) - [4190](#)
- SUPPLEMENTAL PAYROLL REPORT (OGDEN SD) - [3830](#)

3.3.3 Wage Survey Files – [GRS-142](#)

R: Superseded; D: Destroy.

These files contain wage survey reports and data, working papers and related correspondence pertaining to area wages paid for each employee class; background papers establishing need, authorization, direction, and analysis of wage surveys; development and implementation of wage schedules; and development of specific rates (excluding authorized wage schedules and wage survey recapitulation sheets).

3.3.4 Summary Time Report – [GRS-1878](#)

R: 3 years; D: Destroy.

This report provides information on the regular and overtime hours paid. It also includes all other earnings and the labor distribution.

3.3.5 Leave Category Changes – [GRS-1885](#)*R: 3 years; D: Destroy.*

Report showing changes made if an employee does not have enough leave and payroll program must adjust from another category.

3.3.6 State Employee Benefit Matching Money Report – [GRS-1877](#)*R: 3 years; D: Destroy.*

Listing of state matching funds paid to employee retirement and referenced by low organization number.

- RETIREMENT AND DISTRIBUTION REPORT (CARBON COUNTY SD) - 9654

3.3.7 Preliminary Payroll Files – [GRS-1889](#)*R: 1 year; D: Destroy.*

Computer-produced, two-part documents sent by Finance to agencies to record final corrections or adjustments regarding employees' pay. They are made before the master payroll file is run and checks are issued. Preliminary payroll files do not serve as time and attendance records.

3.3.8 Payroll Post Processing Records – [GRS-1904](#)*R: 7 years; D: Destroy.*

This schedule is for payroll reporting. Each payroll period is closed out when disbursement information is verified using payroll reports.

- EMPLOYEE ABSENCE AND LEAVE REPORT (ALPINE) - [13232](#)
- EMPLOYEE ACCOUNT DISTRIBUTION REPORT (ALPINE) - [4192](#)
- MINI-RUN PROFORMA REPORTS (ALPINE) - [26513](#)
- PAYROLL HISTORY YEAR-END REPORT (OGDEN SD) - 83769

3.3.9 Miscellaneous Series

Varies.

- MONTHLY INSURANCE REPORTS (SLCSD) - [84825](#) Retain for 1 year(s) Destroy.
- PAYROLL PRINTOUTS (DAVIS COUNTY SD) - [85209](#) Retain for 3 year(s) Destroy.

3.4 REVENUE, GRANTS & PROGRAMS

3.4.1 Sales and Use Tax Records – [GRS-193](#)*R: 4 years; D: Destroy.*

These records document sales taxes collected and remitted, as well as eligibility for exemption. Applicable sales tax forms, exemption certificates, and related records are included.

3.4.2 Title I Records – [GRS-1480](#)*R: 5 years after final action; D: Destroy.*

These files document participation in the federally funded Title I program in accordance with 34 CFR 200 (1997). Title I is designed to be a supplemental funding source which provides additional, or supplemental educational opportunities to students from "low-income or economically disadvantaged families." These funds cannot be substituted for, or used in place of, other monies such as state and local funds to pay for student's basic education. Title I funds go to a district's poorest schools but excess funds may be used to help any low-achieving student, not just those from economically disadvantaged families. Title I funds are designed to assist with school reform and to improve the quality of student educational opportunities.

3.4.3 Unsuccessful Grant Application Files – [GRS-1746](#)*R: 1 year after resolution of issue; D: Destroy.*

Rejected or withdrawn grant applications, memoranda, correspondence, and other records relating to the decision to reject the grant proposal.

3.4.4 Grant Records – [GRS-1859](#)*R: 7 years after final action; D: Destroy.*

These records document grants received or awarded by governmental entities, which may contain applications, notice of award, reports, correspondence, and related records.

- FELLOWSHIP GRANT LEAVE FILES (SLCSD) - [84851](#)

3.5 CHILD NUTRITION

3.5.1 Annual School Lunch and Breakfast Statistical Report – [GRS-1413](#)*R: 3 years; D: Destroy.*

This is the annual statistical report on the school lunch, special milk, and breakfast programs submitted to the State Child Nutrition Section. It is used to create the state annual report and to comply with federal requirements. Includes district number; period covered; number of institutions in lunch and breakfast programs; average number of days lunch served; variations in number of days schools served lunch; reduced price charged to students for lunch; total number of reimbursable student lunches claimed (free, reduced, paid); average number of days breakfasts served; variations in number of days schools served breakfast; reduced price charge to student for breakfast; total number of reimbursable student breakfasts claimed for regular and severe need (free, reduced, paid); title and the reporter's signature. The Schedule A form is submitted with the annual policy indicating each school's percent of free and reduced-price lunch participation in the second preceding year. If the school served at least forty percent free and reduced meals, then that school qualifies for severe need breakfast reimbursement. Qualifying schools are entitled to additional breakfast program disbursement federal funding. Summer programs qualify if the percentage of free and reduced lunches are at least fifty percent of lunches served. The State Child Nutrition's copy is retained for "3 years after final status report is filed with the U.S. Department of Agriculture" in accordance with 7 CFR 210.23 (1995).

- ANNUAL SCHOOL LUNCH AND BREAKFAST STATISTICAL REPORT (BOX ELDER COUNTY SD) - [15202](#)

3.5.2 Department of Agriculture Food Usage and Inventory Report – [GRS-1414](#)*R: 3 years; D: Destroy.*

This is a report submitted in June and December to the Child Nutrition Section, Utah State Office of Education. The report is used to verify usage of U.S. Department of Agriculture (USDA) food indicating what and how fast it is being used. This report includes program, report closing date, USDA food received, units on hand, transfers out of the School Food Authority (SFA), total available for use, amount used, adjustment, and new inventory. The state maintains their copy for 3 years after close of fiscal year to which records pertain and then destroy.

- UNITED STATES DEPARTMENT OF AGRICULTURE COMMODITY FOOD ACCEPTANCE SHEET (MORGAN COUNTY SD) - [10218](#)

3.5.3 Free and Reduced Meals Annual Policy Agreement – [GRS-1416](#)*R: 3 years; D: Destroy.*

This agreement policy is a legal contract between the state and local districts participating in the Child Nutrition Programs. After 1997 a permanent agreement would be initially made, followed by an annual extension document updating current signatures and information. It includes the prototype free and reduced-price policy, changes, and current benefit application. Copies of the free and reduced-price meal policies must also be maintained at each school. The state's copy is maintained for 3 years after formal status report is filed with U.S. Department of Agriculture in accordance with 7 CFR 210.23(c) (1995).

- SCHOOL FOOD SERVICES SCHOOL LUNCH AGREEMENTS (BOX ELDER COUNTY SD) - [14734](#)
- SCHOOL FOOD SERVICES FREE AND REDUCED MEALS POLICY (BOX ELDER COUNTY SD) - [14735](#)

3.5.4 Meals and Milk Count Reports – [GRS-1417](#)

R: 3 years; D: Destroy.

These are reports submitted by each elementary and secondary school on milk and meals served daily. They are used to generate reimbursements for meals meeting regulating requirements. The report includes the date, school, total meals served, number of paid, reduced, free, paid, and adults served.

- SCHOOL FOOD SERVICES MEAL COUNT REPORTS (BOX ELDER COUNTY SD) - [14740](#)

3.5.5 Monthly Reimbursement Claim Report – [GRS-1418](#)

R: 3 years; D: Destroy.

This is a monthly claim report on the National School Lunch, Milk, and Breakfast programs submitted to the State Child Nutrition Section of the Utah State Office of Education. It is used to request reimbursements for free, reduced price, and paid lunches and breakfasts provided to all school children according to eligible status. The report includes program name, agreement number, beginning and ending dates of report; number of sites; attendance factor; statistics for children approved; potentially eligible; public school meals actually served and meals served to non-public school children for free, reduced, paid and totals; explanations of change from current and previous months for free, reduced, paid, and totals; statement certifying accuracy of report; authorizing signature; date; and report preparer's name. The State's copy is maintained for 3 years after final status report is filed with the U.S. Department of Agriculture in accordance with 7 CFR 210.23 (1995).

3.5.6 Verification Report – [GRS-1420](#)

R: 3 years; D: Destroy.

This is an annual report submitted to the Office of Education's Child Nutrition Programs to verify accuracy of income levels and number of children served with free and reduced meals. The report includes district name, date, total number of free/reduced price applications on file as of October 31, the percent sample of children selected (depending on the type of verification used), how selection was made (computer or random number table), total applications needed for verification purposes, total applications actually verified, total applications with no change in status, total applications changed category, total applications terminated because applicants failed to respond to survey, whether verification completed by December 15, and signature. The summary tracking verification form from each school includes application number, head of household selected for verification, whether free or reduced, number of children, indication of any change, date, any comments, totals, signature of verifying official, and dates report completed and submitted to State.

- SCHOOL FOOD SERVICES VERIFICATION REPORT (BOX ELDER COUNTY SD) - [14739](#)

3.5.7 Student Daily Meal Payment Report – [GRS-1520](#)

R: 1 year; D: Destroy.

These reports document the daily collection of payments for meal service. This report records deposits made to the lunch and breakfast funds. It includes the student's name, identification number, amount received, account balance, and total student sales.

- DAILY LUNCH, BREAKFAST, AND DEPOSIT REPORTS (OGDEN SD) - [11670](#)

3.5.8 Daily School Food Service Report – [GRS-1521](#)

R: 1 year; D: Destroy.

This daily computer report records individual participation in the school's meals program. The information is retained on-line for one month and then a summary report is printed. The monthly report contains a summary of all meals served daily during the month and is broken down by adult meals, students paid, and reduced and free meals.

3.5.9 School Food Production Record Sheet – [GRS-1525](#)*R: 3 years; D: Destroy.*

This sheet is prepared daily by the school food service for all meals served. It is used to plan meals and to determine menu items needed for meal preparation. The sheet contains the menu items, portion sizes, meal compliance, planned amount and actual amount of food used, vitamin and iron usage, number planned for and number actually served, and tray count.

3.5.10 Free and Reduced Meals Applications – [GRS-1526](#)*R: 3 years; D: Destroy.*

These application forms are completed by families requesting free or reduced-price meals. They list all household members, give a breakdown of monthly household income, and require the signature and social security number of the adult household members applying. A section is completed by the school/district, which identifies the approved meal type (free/reduced) and is signed and dated by the approving official.

3.5.11 Lunchroom Summary of Meals Served Report – [GRS-1534](#)*R: 3 years; D: Destroy.*

This monthly sheet records all meals served. It is used to create quarterly and annual reports. It contains a breakdown of a la carte items, milk and meals served by category (free, reduced, paid, adult).

- DAILY MEALS RECORDS (SUMMIT ACADEMY) - [28533](#)

3.5.12 Lunch Tally – [GRS-1535](#)*R: Superseded; D: Destroy.*

This records the anticipated lunch count for the noon meal. IT is used for food preparation purposes. This form includes the number of students and adults planning to have lunch as well as the milk count.

- LUNCH TALLY (DAVIS COUNTY SD) - [10132](#)

3.5.13 Monthly Department of Agriculture Food Usage Sheet – [GRS-1538](#)*R: 1 year; D: Destroy.*

This monthly sheet serves as an on-going inventory on the usage of U.S. Department of Agriculture (USDA) food. The sheet is provided to the elementary school and lists food totals. The school maintains the inventory and submits it to the district office at the end of each month listing all USDA food received, amounts used, and inventories on hand. It is used to compile reports.

- SCHOOL FOOD SERVICES MONTHLY DEPARTMENT OF AGRICULTURE FOOD USAGE SHEET (BOX ELDER COUNTY SD) - [14738](#)

3.5.14 School Monthly Meals Served Report – [GRS-1540](#)*R: 1 year; D: Destroy.*

This is a monthly report of all meals served. Copies of the report are submitted to the district's food service manager. The reports include date, daily number of meals paid, number of reduced meals served, number of free meals served, total meals served to children, number of meals served to adults, paid meals, total meals, total enrollment, monthly totals, and total dollar values.

3.5.15 School Monthly Meals Payment Report – [GRS-1541](#)*R: 1 year; D: Destroy.*

This report is submitted monthly with bank deposit slips to the district's business administrator. It reports monies collected for school meals served during the month and is used by the district to reconcile bank deposits. It includes amounts collected from teachers and staff, students with reduced costs, regular students, other adults, and daily and monthly totals.

4. HR MANAGEMENT

4.1 PERSONNEL

4.1.1 Equal Employment Opportunity (EEO) Compliance Case Files – [GRS-153](#) *R: 3 years; D: Destroy.*

These are compliance files containing background papers and correspondence relating to contractor employment practices.

4.1.2 Equal Employment Opportunity (EEO) Discrimination Complaint Case Files – [GRS-154](#) *R: 4 years after case is closed; D: Destroy.*

These files document official discrimination complaints received and resolved. The files contain complaints, related correspondence, reports, exhibits, withdrawal notices, copies of decisions, records of hearings and meetings, and other records as described in 29 CFR 1602.14 (2012) 29 CFR 1602.31 (2012).

4.1.3 Labor-Management Relations Files – [GRS-161](#) *R: 5 years; D: Destroy.*

These files document the relationship between management and employee unions or associations. They include correspondence, memoranda, and reports.

4.1.4 Position Analysis Records – [GRS-167](#) *R: 3 years after superseded; D: Destroy.*

These records are used to create new job positions or update existing positions. Information includes job description and analysis, salary, justification, and related records.

- SALARY SCHEDULE FILES (SLCSD) - [84849](#)
- SCHOOL REPORTS (SLCSD) - [84833](#)

4.1.5 Temporary Employees' Personnel Files – [GRS-172](#) *R: 1 year after separation; D: Destroy.*

These are files maintained on temporary employees which were provided no benefits by the governmental entity. They include copies of correspondence and employment forms. They do not include personnel records created for specific federal programs.

4.1.6 Pre-Employment Health Records – [GRS-180](#) *R: 30 years; D: Destroy.*

These health records document preemployment physicals for county positions providing the baseline health data on county employees who qualified for specific positions particularly for the sheriff's office and the fire department positions. These records are used to limit liability in deployment of workers, to establish the health status of potential workers, and to limit the effect of occupational related diseases and conditions that might limit an employee's ability to perform assigned duties. These records include chest and back x-rays, hypertension screenings, blood series, and medical histories.

4.1.7 Exempt Employee Performance-Related Records – [GRS-891](#) *R: 5 years; D: Destroy.*

These files document the performance of exempt employees. They may include performance records superseded through an administrative, judicial, or quasi-judicial procedure; performance appraisals along with job elements and standards upon which they are based; and supporting documentation.

4.1.8 Insurance Policy Contracts – [GRS-942](#) *R: 15 years; D: Destroy.*

These are insurance policy contracts between a government entity and private insurers.

4.1.9 Student and Patron Injury Records – [GRS-1386](#)*R: 7 years; D: Destroy.*

These records document incidents on government agency property where a student or patron suffers significant injuries that are required to be reported.

- DISTRICT INJURY REPORT (PROVO CITY SD) - [26647](#)
- STUDENT INJURY REPORT (DAVIS COUNTY SD) - [10147](#)

4.1.10 Americans With Disabilities Act (ADA) Accommodation Requests – [GRS-1434](#)*R: 5 years after separation; D: Destroy.*

These requests are made by individuals for disability accommodations. They include medical data about the person, accommodations made, denials, appeals, and other information about accommodation requests from service, program, or activity recipients, including applicants, employees and volunteers.

4.1.11 Substitute Teacher Files – [GRS-1436](#)*R: 3 years after separation; D: Destroy.*

These files document persons eligible to be hired as substitute teachers. They include an application form, fingerprints and criminal history check, some transcripts (or other verification of credit hours), and a record of previous substitute teaching.

- SUBSTITUTE TEACHER FILES (DAVIS SD) - [11290](#)

4.1.12 Student Employee Files – [GRS-1437](#)*R: 1 year after separation; D: Destroy.*

These files document students temporarily hired by the school district for groundskeeping, building maintenance, answering telephones, and office assistance. They include application, evaluation, work schedule and related correspondence.

4.1.13 Lane Change Records – [GRS-1440](#)*R: 5 years; D: Destroy.*

These records document requests for lane changes for additional training received. Guidelines have been established providing specific criteria for course acceptance. Prior approval is required for unauthorized classes or seminars. The requests are reviewed by a district committee and are either approved, denied or request additional information. The records include the request, the committee review and decision, and if approved date training completed. These records may be filed in the personnel file.

- LANE CHANGE WORKING FILES (DAVIS SD) - [11287](#)

4.1.14 Personnel Report – [GRS-1443](#)*R: 1 year; D: Destroy.*

It is used to update and inform the board members on the status of employment. It includes the names of individuals being hired, as well as their position and location of work. The report also gives the names of people who have left as well as their position, school, and reason for leaving.

4.1.15 Annual Career Ladder Reports – [GRS-1462](#)*R: Permanent; T: Archives.*

This report is completed once a year by each district. Plans for the Career Ladder program and funds are reported and approved by the State Board of Education in the summer and fall and end-of-year reports made in June. The databases compiled from these reports record district comparisons on both district plans and end of year report.

4.1.16 New Hire Registry Report – [GRS-1464](#)*R: 1 year; D: Destroy.*

This report is required to be submitted to the Utah State Department of Workforce Services on all district new hires in accordance with the Personal Responsibility and Work Opportunity Act. This information is used to create a State New Hire Registry to match against existing child support records to locate parents, establish an order or enforce an existing order. Once these matches are made, the State will transmit the New Hire reports to the National Directory of New Hires (NDDH) which allows the Office of Child Support Enforcement to be able to assist States in locating parents on a national level. The reports include employee name, social security number, mailing address; employer name, federal employer identification number, mailing number; employee date of hire or rehire; employee occupational title; and full-time or part-time employment status. The report is submitted with the employee's W-4 form within twenty days of new employment. The report may be submitted by paper or electronic medium.

4.1.17 Employee and Program Productivity Records – [GRS-1698](#)*R: 2 years after resolution of issue; D: Destroy.*

Reports documenting work productivity of employees or an office. Includes weekly activity or production reports, monthly activity reports, etc.

- ACTIVITIES REPORT FILES (SLCSD) - [84915](#)
- HUMAN RESOURCES WORKING FILES (DAVIS SD) - [11293](#)

4.1.18 W-4 Income Tax Withholdings Certificates – [GRS-1881](#)*R: 4 years; D: Destroy.*

Records of withholding tax allowances completed by state employees which certify the withholding tax status of the employee and any additional withholding from his paycheck.

4.1.19 Employee Wage History Records – [GRS-1905](#)*R: 65 years; D: Destroy.*

These records document employee cumulative salary for employees needed for retirement purposes. Information includes employee details, department and position information, earnings, deductions, and related records.

- EMPLOYEE W-2'S (ALPINE) - [26506](#)
- EMPLOYEE'S WITHHOLDING ALLOWANCE CERTIFICATES (SLCSD) - [84819](#)
- PAYROLL CHECK HISTORY REPORT (ALPINE) - [6206](#)
- PAYROLL CORRESPONDENCE FILE (BOX ELDER COUNTY SD) - [14674](#)
- SALARY DATA BOOKS (OGDEN SD) - [84190](#)
- SPECIAL EDUCATION PAYROLL RECORDS (DAVIS SD) - [28562](#)

4.1.20 Conflict of Interest Files – [GRS-1911](#)*R: Final action; D: Destroy.*

Conflict of interest documentation concerning any employment or activity outside State of Utah employment that may or may not present a conflict of interest.

4.1.21 Employee Assistance Program Files – [GRS-1913](#)*R: 1 year; D: Destroy.*

Records documenting the frequency and other statistical information relating to the number of employees using the Employee Assistance Program (EAP) vendor. This record contains statistical reports submitted by the vendor but does not contain names or other personal information on individual employees.

4.1.22 Employee Training Records – [GRS-1916](#)*R: Separation; D: Destroy.*

These records document employee participation in training programs sponsored by governmental agencies or non-governmental institutions. Information may include correspondence, memoranda, reports, and other records relating to course availability and participation.

4.1.23 Notification of Personnel Actions – [GRS-1937](#)*R: 4 years; D: Destroy.*

These records document initial employment, promotion, transfers to or from agency, separation, and all other individual personnel actions.

4.1.24 Worker's Compensation Case Files – [GRS-1938](#)*R: 75 years OR 10 years after case is closed; D: Destroy.*

Records include forms, first report of injury, reports, correspondence, and related medical and investigative records regarding on-the-job injuries, whether or not a claim for compensation was made. See Utah Code 34A-2 for Worker's Compensation Act.

- DAVIS SCHOOL DISTRICT WORKERS' COMPENSATION FILES (DAVIS SD) - [28245](#)
- WORKER'S COMPENSATION WORK FILES (ALPINE) - [28686](#)

4.1.25 Drug Test Positive Results – [GRS-1958](#)*R: 5 years; D: Destroy.*

These are records of employee drug or alcohol tests which were found to be positive and any records that demonstrate rehabilitation. Information may include the functions performed by each employee who failed the test, the prohibited drugs used, the disposition of the employees (e.g. separation or rehabilitation), the person or entity performing the test, and the date and location of test.

4.1.26 Drug Test Negative Results – [GRS-1959](#)*R: 1 year; D: Destroy.*

These are records of employee drug or alcohol tests, the results of which were found to be negative. Information may include the identity of the person performing the test and the date and location of the test.

4.1.27 Fitness for Duty Evaluations – [GRS-1962](#)*R: 5 years; D: Destroy.*

Records which contain any medical or psychological information used to determine an employee's fitness for duty.

4.1.28 Volunteer Files – [GRS-1963](#)*R: 5 years after separation; D: Destroy.*

These records are used to verify background information on volunteers prior to and during employment. These files often contain volunteer applications, letters of commendation, photos of the volunteer, background investigations, and other information relating to volunteer service activities.

4.1.29 Staff Acquisition Records – [GRS-1964](#)*R: 2 years after final action; D: Destroy.*

Records related to the recruiting and hiring of employees, including candidates not hired. The resume and application of hired individuals are part of the Employee History Records.

- APPLICANT DATA SYSTEM (DAVIS SD) - [11280](#)
- EMPLOYMENT APPLICATIONS (DAVIS SD) - [11282](#)
- JOB DESCRIPTIONS (DAVIS SD) - [11288](#)
- TEACHER APPLICATION UNIVERSITY FILES (SLCSD) - [85193](#)
- UNHIRED EMPLOYMENT APPLICATIONS (SLCSD) - [84822](#)
- UNIVERSITY TEACHER RECOMMENDATION PACKETS (PROVO CITY SD) - [84791](#)

4.1.30 Employment History Records – [GRS-1965](#)

R: 65 years after date of hire OR 3 years after retirement or death; D: Destroy.

Employment history documents the application, hiring, and employment with a governmental entity of all personnel, including all records necessary to calculate benefits. Final actions taken as a result of disciplinary action are included in this schedule.

- ACTIVE CLASSIFIED PERSONNEL FILES (ALPINE) - [29744](#)
- CLASSIFIED PERSONNEL DISCIPLINARY FILES (ALPINE) - [20090](#)
- CLASSIFIED PERSONNEL RECORDS (ALPINE) - [20088](#)
- CLASSIFIED PERSONNEL RECORDS (JORDAN SD) - [27220](#)
- EMPLOYEE HISTORY CARDS (SLCSD) - [84815](#)
- EMPLOYEE SALARY BREAKDOWN REPORT (ALPINE) - [4216](#)
- HOURLY TERMINATIONS (ALPINE) - [27268](#)
- PAY RECORD (MURRAY CITY SD) - [593](#)
- PERMANENT EMPLOYEE CARD (OGDEN SD) - [84191](#)
- PERSONNEL DATA SYSTEM (DAVIS SD) - [11277](#)
- PERSONNEL RECORDS (CARBON COUNTY SD) - [15318](#)
- TEACHERS' PERSONNEL FILES (PROVO CITY SD) - [84790](#)

4.1.31 Performance Plans and Evaluations – [GRS-1966](#)

R: 3 years after separation; D: Destroy.

This information documents an employee's performance, including awards, performance plans, and evaluations.

- EDUCATOR PERSONNEL FILES (ALPINE) - [20087](#) (65-YEAR RETENTION)
- EMPLOYEE RECORDS (NORTH DAVIS PREPARATORY ACADEMY) - [28144](#) (65-YEAR RETENTION)
- HUMAN RESOURCE AND PAYROLL RELATED RECORDS (NAVIGATOR POINTE ACADEMY) - [28142](#)

4.1.32 Employee Health and Medical Records – [GRS-1968](#)

R: 7 years after separation; D: Destroy.

These records document an employee's fitness for duty. Documentation for health-related leave is included.

- INSURANCE DATA SYSTEM (DAVIS SD) - [11279](#)

4.1.33 Complaint Investigation Files – [GRS-1969](#)*R: 7 years after separation or after case is closed; D: Destroy.*

Initial documentation of complaints that result in an investigation of an employee but do not result in disciplinary action.

4.1.34 Verification Of Employment Eligibility – [GRS-1970](#)*R: Varies; D: Destroy.*

This background documentation is used to verify employment eligibility. Information may include background checks, fingerprints and requirements under the Immigration Reform and Control Act. The resume and application of hired individuals are part of the Employee History Records.

4.1.35 Faculty History Records – [GRS-2036](#)*R: 65 years; D: Permanent; T: Archives.*

This information includes each teacher's name, department, and classes taught.

4.1.36 Student Employee Records – [GRS-2038](#)*R: 1 year after end of employment; D: Destroy.*

These records document students temporarily employed by the educational institution. Information includes application, evaluation, work schedule, and related records.

4.1.37 Miscellaneous Series

R: 1 years; D: Destroy.

- INSURANCE RECORDS (CACHE COUNTY SD) - 11969
- MILITARY LEAVE REQUEST (DAVIS COUNTY SD) - [10133](#)

4.2 TEACHER CERTIFICATION, STAFF DEVELOPMENT & TRAINING

4.2.1 Training and Outreach Records – [GRS-150](#)*R: 6 years; D: Destroy.*

These records document agency development, planning, and operation of training and outreach courses and events. Information may include curriculum requirements and objectives, program assessments, participation and evaluations, and documents relating to the facilitation of events.

4.2.2 Teacher Certification System – [GRS-1441](#)*R: Superseded; D: Destroy.*

This computer system documents all teachers certified to teach in the State of Utah. The Utah State Office of Education (USBE) adds basic information on certified teachers including degrees, state in-service training, certificates, and endorsements while the district is responsible for keeping employment information current. The district adds current assignments including an accurate specific percentage breakdown (e.g., 50 percent physical education, 25 percent teaching history, 25 percent teaching English), salary, lane and step, number of days working, and credit summary. The information is updated monthly and is audited by the USBE. When the teacher moves from one district to another, the employee must be terminated before the new district can add current information. The system includes demographic data (i.e., name, social security number, date of birth, home address), certificates and endorsements, criminal history (if any), in-service training received, and a listing of professional teaching experience.

4.2.3 Teacher Career Ladder Files – [GRS-1519](#)*R: 3 years; D: Destroy.*

These files document the career ladder process at the elementary school. They are used by the school principal to review the teachers' goals and accomplishments and to evaluate their teaching abilities. The school principal meets with each teacher on a regular basis to discuss their career ladder and

teaching goals. These files include: the results of inventories taken on prerequisite skills, goals for the teachers and the school, various test results (including the California Achievement Test), teaching and observation results. The district normally maintains the official copies of all career ladder records.

- CAREER LADDER FILES (SLCSD) - [84710](#)

4.2.4 Conference Sponsorship Files – [GRS-1700](#)

R: Permanent; T: Archives.

Records created by an agency sponsoring a conference, workshop, or seminar. Information may include copies of conference agenda, programs, brochures, reports, advertising information for the conference, presentations, speeches, significant correspondence, and related material.

4.2.5 Training Aids – [GRS-1951](#)

R: End of project or program; D: Permanent; T: Archives.

One copy of each syllabus, manual, textbook, videos, and any other training materials created by the agency.

- DINÉ LANGUAGE AND CULTURAL CURRICULUM RECORDS (SAN JUAN COUNTY SD) - [28910](#)
- DINÉ LANGUAGE AND CULTURAL LEARNING AIDS (SAN JUAN COUNTY SD) - [28789](#)
- UTE LANGUAGE LEARNING AIDS (SAN JUAN COUNTY SD) - [28883](#)

4.3 MISCONDUCT, DISCIPLINE & GRIEVANCE

4.3.1 Grievance Records – [GRS-1967](#)

R: 3 years; D: Destroy.

Initial documentation responding to working condition grievances that result in any type of investigation for possible personnel or administrative action.

4.3.2 Civil Case Files – [GRS-2034](#)

R: 10 years after case is closed; D: Destroy.

These case files document civil court cases. Records include court filings, attorney's notes, various court pleadings and related records.

5. STUDENT LEARNING & ADMINISTRATION

5.1 STUDENT RECORDS

5.1.1 Attendance Rolls – [GRS-1036](#)

R: 1 year; D: Destroy.

These are created by instructors to track class or activity attendance.

- MONTHLY ABSENCE FILES (SLCSD) - [84717](#)
- OFFICE REPORTS (CANYONS SD) - [27965](#)
- STUDENT CLASS SCHEDULES (SLCSD) - [84932](#)
- WEEKLY ROLL SHEETS (OGDEN SD) - [11679](#)

5.1.2 Student Visa Case Files – [GRS-1487](#)

R: 4 years; D: Destroy.

These files document foreign students attending district schools. Students must be certified eligible to attend an authorized school in the United States and have a valid student visa. All fees must be paid before admission. These files include student's name, local address, Form I-20 (school copy), home country, admission number, Immigration and Naturalization (INS) number, district information, school attendance, type of study, cost to the United States, payment schedule, visa information, immunization information, payment agreement, student form, school transcripts, affidavit of financial support from family, application for admission, and host family agreement.

5.1.3 Early Graduation Certificates – [GRS-1490](#)

R: 1 year; D: Destroy.

These records document the issuance of certificates to students graduating early from high school in accordance with UCA 53A-15-102 (1997). This program allows flexibility in high school graduation to appropriately meet individual student's needs. If a student graduates any time following the eleventh-grade year and enters a Utah post-secondary institution, the district shall receive a reimbursement designated for the public high school from which the student graduated early. The post-secondary institution receives an Early Graduation Centennial Scholarship Certificate signed by the high school principal entitling the early graduate to a partial tuition scholarship following the date of graduation according to the schedule established by, Utah Administrative Code, Rule 277-703-2 (2013). These records include school district; high school name; telephone number; student's name, social security number, address, and telephone number.

5.1.4 Non-Resident Student Report – [GRS-1493](#)

R: 3 years; D: Destroy.

This report documents non-resident students attending schools within the district and is submitted to the State Office of Education. "Resident districts pay nonresident district one-half the amount by which the resident district's per student expenditure exceeds the value of the state's contribution" to district in accordance with UCA 53A-2-210(2) (2008). The report is separated by school and includes district, number of days nonresident students enrolled, and grade level of nonresident students.

5.1.5 Homeless Student Report – [GRS-1494](#)

R: 2 years; D: Destroy.

This report documents homeless students attending schools within the district. UCA 53A-11-101 (2007) requires minors between the ages of six and eighteen to attend school during the school year while UCA 53A-2-201(3) (1997) makes each school district responsible for providing education services for all school age children within the district. The State Office of Education distributes monies from the federal Homeless Children and Youth program (34 CFR 74) to ensure that

a child's education is not needlessly disrupted because of homelessness. The report includes Student's name, reasons for homelessness, date, month, and student's address.

5.1.6 Monthly Homeless Children and Youth Statistical Report – [GRS-1495](#)

R: 2 years; D: Destroy.

This monthly report is submitted to the State Office of Education (USBE) on homeless children and youth served by the district. It is used to document the utilization of federal Education for Homeless Children and Youth Grants distributed by USBE. The report includes number of homeless children and youth served and how homeless funds were being used.

5.1.7 Non-Transferred Student Files – [GRS-1497](#)

R: 3 years after separation; D: Destroy.

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

5.1.8 Student History – [GRS-1499](#)

R: 40 years after separation; D: Permanent; T: Archives.

This information includes each student's name, date of birth, parents or guardians; date student entered and exited the school and the number of days in attendance.

- ADULT EDUCATION RECORDS (BEAVER COUNTY SD) - [29800](#)
- CENTRAL UTAH VOCATIONAL STUDENT RECORDS (USBE) - [17699](#)
- EVENING HIGH SCHOOL STUDENT RECORDS (USBE) - [14062](#)
- STUDENT HISTORY RECORDS (DAVIS SD) - [18581](#)

5.1.9 Student Enrollment and Registration – [GRS-1501](#)

R: Superseded OR Retain for 4 years; D: Destroy.

These records capture the necessary information to enroll a student in a particular school and document their attendance and course of study. The application process of those seeking to home school or participate in alternative programs is included in this schedule.

- ANNUAL PUBLIC-SCHOOL ENROLLMENT REPORT (BOX ELDER COUNTY SD) - [14729](#)
- CLASS REGISTRATION GUIDE (SLCSD) - [84999](#)
- STUDENT HEALTH CARDS (JORDAN SD) - [26803](#)

5.1.10 Education Performance and Testing – [GRS-1503](#)

R: 3 years after separation; D: Destroy.

These records document student performance and educational history. They include test scores, grades, and any other progress or performance measures.

- CHAPTER I PROGRAM STUDENT RECORDS (SLCSD) - [84723](#)
- ELEMENTARY AND MIDDLE SCHOOL NON-TRANSFERRED STUDENT FILES (PROVO CITY SD) - [84449](#)
- GIFTED STUDENT TEST RESULTS (CANYONS SD) - [28340](#) (15-YEAR RETENTION)
- GRADE ROLL BOOKS (CANYONS SD) - [27967](#)
- INDIAN HILLS MIDDLE SCHOOL STUDENT TEST RESULTS (CANYONS SD) - [28371](#)
- NATIONAL JUNIOR HONOR SOCIETY AND NATIONAL HONOR SOCIETY STUDENT RATING/EVALUATION RECORDS (JORDAN SD) - [21956](#)
- OFFICE OF STUDENT SERVICES ELEMENTARY AND MIDDLE SCHOOL NON-TRANSFERRED STUDENT FILES (JORDAN SD) - [82449](#)
- OFFICE OF STUDENT SERVICES STUDENT CUMULATIVE RECORDS (JORDAN SD) - [82448](#)
- STUDENT CARDS (OGDEN SD) - [28889](#)
- VOCATIONAL EDUCATION FILES (SLCSD) - [84967](#)

5.1.11 Student Permission and Passes – [GRS-1505](#)

R: 1 year; D: Destroy.

These records document parent or guardian consent for their student to participate in an activity or leave school during school hours.

- HOME EXCUSE FILES (SLCSD) - [84942](#)

5.1.12 Graduation And Transcripts – [GRS-1506](#)

R: 40 years after separation; D: Permanent; T: Archives.

Official transcripts document students' graduation from high school and verify classes attended and credits earned. Transcripts should note suspension and expulsion from school. Transcripts of students who did not graduate are included in this schedule.

- HIGH SCHOOL GRADUATES' RECORDS (SLCSD) - [17871](#)
- WITHDRAWN STUDENT RECORDS (CARBON COUNTY SD) - [15317](#)

5.1.13 Student Fee Waiver Records – [GRS-1522](#)

R: 4 years after separation; D: Destroy.

These records document the application and receipt of a waiver for the payment of student fees in accordance with UCA?? 53A-12-103??(2008). The application is sent to all students with a statement of fees owed as part of the registration process. They are completed annually. Parents complete the application and submit it to the school. All fees are suspended until the school determines student's eligibility for fee waiver. If waiver is granted, then a fee waiver statement is signed. The records include the application and the fee waiver statement. The application includes the student's name, date, parent's or guardian's name, reason for waiver; and indication of fees being requested to be waived (fee description and amount). The fee statement includes parent's or guardian's name, address, and telephone number; date; student's name and grade; fees being waived; total fees waived; parent's or guardian's signature; and administrator's signature.

5.1.14 Graduation Programs – [GRS-1529](#)

R: Permanent; T: Archives.

These are programs for graduations. The programs include high school or college, date, time and location of the commencement ceremonies, scheduled program, lists of honor graduates, and listing of all graduates.

5.1.15 Student Membership Summary Records – [GRS-1559](#)*R: 3 years; D: Destroy.*

This report is completed on student enrollment and dropouts as of October 1. It is used to qualify for state funding. Individual schools directly update the State computer system. The report is printed, signed and audited by district external auditors and sent to the State Office of Education. The report includes student enrollment by school, by grade, and ethnic group. The report also includes the dropout report.

- STUDENT DROPOUTS ANNUAL REPORT (SLCSD) - [84651](#)
- STUDENT MEMBERSHIP REPORT (MURRAY SD) - [13747](#)

5.1.16 Higher Education Admitted Student Application Records – [GRS-2041](#)*R: 5 years after graduation or separation; D: Destroy.*

These records document admitted students' applications to the educational institution. Information may include visas, admission test, and proofs of financial support, high school transcripts, and related records.

5.1.17 Educational Advising Records – [GRS-2042](#)*R: 5 years after separation; D: Destroy.*

Typically associated with Higher Education- These records document the interactions between students and advisors regarding education requirements and planning.

5.1.18 Military and Veteran's Student Records – [GRS-2046](#)*R: 5 years after separation; D: Destroy.*

These records document the academic and enrollment status of students in the military or receiving veterans' benefits. Information includes certificates of release or discharge from active duty, changes of program or location of training, benefits received, tuition details, and related records.

5.1.19 Student Academic Records – [GRS-2048](#)*R: 20 years after graduation; D: Permanent; T: Archives.*

Typically associated with Higher Education- These records document students' academic performance. Information includes final grades, supplemental grade changes, Master's theses and Ph.D. dissertations, graduation, and related records.

5.1.20 Section 504 Student Records – [GRS-16548](#)*R: 3 years after separation; D: Destroy.*

These records document the progress and participation of students under Section 504 of the Rehabilitation Act. Records may include 504 plans, manifestation review records, parental information and correspondence, financial assistance, assessments and related records.

5.1.21 Miscellaneous Series

R: Permanent; T: Archives.

- GRADUATES' LISTS (SLCSD) - [84657](#)
- HIGH SCHOOL GRADUATE'S FOLLOW-UP STUDY DATA (USB) - [1879](#)
- STUDENT CARD INDEXES (SLCSD) - [84637](#)

5.1.22 Miscellaneous Series

R: Final action; D: Destroy.

- CHAPTER I STUDENT RECORDS (DAVIS COUNTY SD) - [10128](#)
- STUDENT RECORDS (DAVIS COUNTY SD) - [10144](#)

5.1.23 Miscellaneous Series

R: 1 year; D: Destroy.

- DAILY ABSENCE REPORTS (SLCSD) - [84696](#)
- LOCATOR CARDS (SLCSD) - [84908](#)
- MONTHLY MEMBERSHIP REPORTS (SLCSD) - [84715](#)
- REGISTRATION SURVEY PRINTOUTS (SLCSD) - [84643](#)
- STUDENT WITHDRAWAL RECORDS (DAVIS COUNTY SD) - [10179](#)
- TRANSCRIPT REQUEST FORMS (SLCSD) - [84653](#)

5.1.24 Miscellaneous Series

Varies.

- ADULT SCHOOL TRANSFER CARDS (SLCSD) - [84638](#) - Retain for 20 year(s). Destroy
- DAILY ATTENDANCE REPORT (OGDEN SD) - [11671](#) - Retain for 3 year(s). Destroy
- FAMILY HISTORY CARDS (SLCSD) - [84649](#) - Permanent. Retain for 75 year(s). Archives
- GRADE SHEETS (SLCSD) - [84907](#) - Retain for 3 year(s). Destroy
- INITIAL REGISTRATION CARDS (SLCSD) - [84714](#) - Retain for 5 year(s). Destroy
- MEMBERSHIP ROSTERS (SLCSD) - [84647](#) - Retain for 4 year(s). Destroy
- OFFICIAL STUDENT TRANSCRIPTS (CANYONS SD) - [5530](#) - Permanent. Retain for 40 year(s) after separation. Archives
- STUDENT CUMULATIVE RECORDS (MURRAY CITY SD) - [12674](#) - Permanent. Retain for 1 year(s). Archives
- STUDENT REGISTRATION CARDS (DAVIS COUNTY SD) - [10174](#) - Retain for 2 month(s) after resolution of issue. Destroy
- STUDENT TRANSFER FORMS (SLCSD) - [84655](#) - Retain for 9 year(s). Destroy

5.2 SPECIAL EDUCATION PROGRAM/ STUDENT HEALTH & BEHAVIOR5.2.1 School Student's Immunization Assessment Annual Report – [GRS-599](#)*R: 2 years; D: Destroy.*

These forms document surveys taken by schools or local health departments of children entering kindergarten and childcare to determine immunization status. Copies of the forms are sent to the State Department of Health. The forms include name of facility and responsible party, number enrolled in kindergarten or

day care, number of children with immunization cards or records turned in to the school, number of children with no record, number of children adequately immunized, number of exemptions (medical, religious, personal), and total number of exemptions. These records are also called Preschool immunization survey sheets.

5.2.2 Special Education Records – [GRS-1476](#)

R: 3 years after separation OR Retain for 5 years after separation; D: Destroy.

A student with a disability under the age of 22 who has not graduated from high school with a regular diploma may participate in a public-school program or extracurricular activity. (Utah Code 53G-6-709) These records document the progress and participation of students or clients enrolled in special education programs. Information includes individualized education program records (IEPs), evaluations, parental information and correspondence, assessments and related records.

- SPECIAL EDUCATION RECORDS (WEBER SD) - [28982](#) (5-YEAR DISPOSITION)
- STATE DEVELOPMENTAL CENTER ACADEMIC RECORDS (ALPINE) - [13113](#)

5.2.3 Student Medical Log Records – [GRS-1502](#)

R: 3 years after separation; D: Destroy.

These records are maintained to ensure that students meet mandated health requirements to attend school and to ensure that, as appropriate, medical needs are met during school hours.

- MEDICATION ADMINISTRATION AUTHORIZATIONS (DAVIS COUNTY SD) - [10126](#)
- PRESCRIBED MEDICATION RECORD (DAVIS COUNTY SD) - [10139](#)

5.2.4 Student Discipline – [GRS-1504](#)

R: Until resolution of issue; D: Destroy.

Student misconduct may be the subject of disciplinary action if the conduct disrupts the educational environment, threatens or harms persons or property, or disrupt school activities. Any record or information that is created or used to address student misconduct is included.

- DISCIPLINE FILES (SLCSD) - [84941](#)
- STUDENT DISCIPLINE FILES (SLCSD) - [85000](#)

5.2.5 Miscellaneous Series

R: Varies; D: Destroy.

- CARSON SMITH SCHOLARSHIP RECORDS (USBE) – [28860](#)
- COUNSELOR'S STUDENT FILES (SLCSD) - [84966](#)
- PETTS PROGRAM RECORDS (USBE) – [29778](#)
- SCHOOL COUNSELOR'S SUBJECT FILES (SLCSD) - [84994](#)
- SOCIAL WORKER SUBJECT FILES (SLCSD) - [84996](#)

5.3 SCHOOL ARTIFACTS, HISTORIES & PUBLICATIONS

5.3.1 Historian's Books – [GRS-1530](#)*R: Permanent; T: Archives.*

These books document the events of the year. They are compiled by the school's historian. There is a separate book for each school year. The books contain photographs; newspaper articles; programs for special programs and events; the school newspaper; and short written descriptions of special school activities.

5.3.2 School Histories – [GRS-1551](#)*R: Permanent; T: Archives.*

These histories are compiled by the schools. They describe the school's beginnings and developments and include yearbooks and other publications of activities.

- CLASS SCHEDULES AND TEACHER LISTS (USBE) - [1435](#)
- HISTORIAN'S BOOKS (SLCSD) - [84943](#)

5.3.3 Agency History Records – [GRS-1723](#)*R: Permanent; T: Archives.*

These records document the organization and reorganization of governmental entities. Information includes history, functional information, geographical boundaries, organizational files and related records.

5.3.4 Public Presentations Files – [GRS-2004](#)*R: 7 years; D: Permanent; T: Archives.*

Speeches, addresses, and comments. Remarks made at formal ceremonies and during interviews by heads of agencies or their senior assistants concerning the programs of their agencies.

5.3.5 Artifacts – [GRS-2049](#)*R: Permanent; T: Archives.*

These artifacts are objects that have special historical significance because of their historic or evidentiary value and their association with the function and activity of a governmental entity. Governmental entities work with the Division of Archives to ensure that these historical objects are properly documented and preserved. (Utah Code 63A-12-103(10)(2016))

5.3.6 Museum Catalog Records – [GRS-2050](#)*R: Permanent; T: Archives.*

These records document the planning, preservation, and contents of collections and exhibitions. Included are inventories, finding aids, loans and donations, and related information.

5.3.7 Scrapbooks – [GRS-2051](#)*R: Permanent; T: Archives.*

These records are created by governmental entities compiling various items together to tell the story of their office. They include photographs, newspaper clippings, and other items pertaining to government activities, and Surveillance Recordings actions and reactions of citizens.

- PHOTOGRAPH ALBUMS (DAVIS COUNTY SD) - [10141](#)

5.4 SCHOOL MISCELLANEOUS

5.4.1 Sports Teams Records – [GRS-650](#)*R: Permanent; T: Archives.*

These records document the sponsorship of adult and/or youth team sport activities (e.g., baseball, basketball, volleyball, soccer, softball). They include information on teams, participants, and sponsors; assignment of umpires; regular play schedules; tournament schedules; and awards and prizes.

5.4.2 Surveillance Recordings – [GRS-2021](#)*R: Resolution of issue; D: Destroy.*

These records consist of surveillance used to record activity on government property. Incidents requiring further evaluation are not included.

Student Surveillance and Incident Records [25866](#)

5.4.3 Financial Aid Records – [GRS-2043](#)*R: 5 years after separation; D: Destroy.*

These records document students' applications and awards of financial aid. Information necessary to support the borrower's eligibility and participation is included.

5.4.4 Student Athletic Records – [GRS-2044](#)*R: 5 years after separation; D: Destroy.*

Typically associated with Higher Education - These records document student eligibility and participation in athletic clubs and teams. They are used to monitor student athletes' medical histories during their association with the college or university athletic program.

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