

## Retention and Classification Report

**Agency:** Duchesne County School District (Utah) (310)

1010 East 200 North  
Roosevelt, UT 84066  
435-738-1240

**Records Officer:** \_\_\_\_\_

25614	Annual audits
29503	Budget and finance
10543	FICA reports
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10572	Payroll distribution report
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29556	Policies and procedures
10542	Retirement reports
09879	School board minutes

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 25614

3

**TITLE:** Annual audits

**DATES:** 1928-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are reports prepared by external auditors examining and verifying the school district's financial activities for the year. "The audit required for any fiscal year shall be completed within six calendar months after the close of the fiscal year" (UCA 51-2-2 (1995)). The audit is required to include "the financial statements; the auditor's opinion on the financial statements; a statement by the auditor expressing positive assurance of compliance with state fiscal laws identified by the state auditor; a copy of the auditor's letter to management that identified any material weaknesses in internal controls discovered by the auditor and other financial issues related to the expenditure of funds received from federal, state, or local governments to be considered by management; and management's response to the specific recommendations" (UCA 51-2-3(1) (1995)).

**RETENTION:**

Retain permanently

**DISPOSITION:**

May Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Audit records, GRS-1727.

**AUTHORIZED:** 10-23-2019

**FORMAT MANAGEMENT:**

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

Microfilm master: Retain in State Archives permanently.

Microfilm duplicate: Retain in Office permanently.

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 25614

**TITLE:** Annual audits

(continued)

**PRIMARY DESIGNATION:**

Public

UCA 51-2-3(3) (2008)

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 29503

3

**TITLE:** Budget and finance

**DATES:** 2016-

**ARRANGEMENT:** Chronological.

**DESCRIPTION:**

The tentative budget is prepared by the superintendent and filed with the school board prior to June 1. "Prior to June 22 of each year, each local school board shall adopt a budget and make appropriations for the next fiscal year" (Utah Code 53A-19-102 (1995). According to Utah Code 53A-19-101(1995), "the budget and its supporting documents are required to include: the revenues and expenditures of the current fiscal year, estimate of revenues for the succeeding fiscal based upon the lowest tax levy that will raise the required revenue, using the current year's taxable value as the basis for this calculation; and a detailed estimate of the essential expenditures for the purposes for the succeeding fiscal year." The school board is required to file a copy of the adopted budget with the state auditor and the State Board of Education.

**RETENTION:**

Retain for 10 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Budget records, GRS-1856.

**AUTHORIZED:** 12-17-2018

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

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

**REVIEW AND UPDATE STATUS:**

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 29503

**TITLE:** Budget and finance

(continued)

This report was reviewed and updated on 11/2019.

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10543

3

**TITLE:** FICA reports

**DATES:** 1986-

**ARRANGEMENT:** Chronological, thereunder numerical by social security number

**DESCRIPTION:**

These files contain records on individual employee's deductions concerning social security number. Include reports relating to income and social security taxes.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Payroll processing records, GRS-1903.

**AUTHORIZED:** 07-01-2015

**FORMAT MANAGEMENT:**

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

Microfilm master: Retain in Office for 3 years and then destroy.

Microfilm duplicate: Retain in Office for 3 years and then destroy.

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10540

3

**TITLE:** Payroll deduction reports

**DATES:** 1983-

**ARRANGEMENT:** Chronological, thereunder alphabetical by name

**DESCRIPTION:**

These registers record by department code amounts deducted from employees payroll checks. They are used for reference in retirement and other miscellaneous deductions.

**RETENTION:**

Retain for 10 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Payroll processing records, GRS-1903.

**AUTHORIZED:** 07-01-2015

**FORMAT MANAGEMENT:**

Paper: For records beginning in 1983 through 1992. Retain in Office until microfilmed and then destroy provided microfilm has passed inspection.

Microfilm master: For records beginning in 1983 through 1992. Retain in State Records Center for 10 years and then destroy.

Microfilm duplicate: For records beginning in 1983 through 1992. Retain in Office for 10 years and then destroy.

Computer output microfilm master: For records beginning in 1992 and continuing to the present. Retain in State Records Center for 3 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).

This disposition is based on the administrative needs expressed by the Business Administrator.

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10540

**TITLE:** Payroll deduction reports

(continued)

**PRIMARY DESIGNATION:**

Private



**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10572

1

**TITLE:** Payroll distribution report

**DATES:** 1974-

**ARRANGEMENT:** Chronological, thereunder alphabetical by employee surname

**DESCRIPTION:**

This monthly computer report is used to monitor program budgets. The report includes employee names, social security numbers, account numbers, current amount paid, quarter-to-date amount paid, calendar year-to-date amount and fiscal year-to-date amount paid. This report is received in paper in two sorts by employee name and by program code. The program report is only used for reference purposes and then is destroyed. Since the payroll register is arranged by location code the distribution report by employee name is the only alphabetical payroll listing and is used extensively by the office. In 1992, it began to be received on Computer Output Microfiche.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**FORMAT MANAGEMENT:**

Paper: For records beginning in 1974 through 1992. Retain in Office for 3 years or until microfilmed and then destroy provided microfilm has passed inspection.

Microfilm master: For records beginning in 1974 through 1992. Retain in State Records Center for 3 years and then destroy.

Microfilm duplicate: For records beginning in 1974 through 1992. Retain in Office for 3 years and then destroy.

Computer output microfilm master: For records beginning in 1992 and continuing to the present. Retain in State Records Center for 3 years and then destroy.

Computer output microfilm duplicate: For records beginning in 1992 and continuing to the present. Retain in Office for 3 years

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10572

**TITLE:** Payroll distribution report

(continued)

and then destroy.

**APPRAISAL:**

These records have administrative value(s).

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

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 9878

1

**TITLE:** Payroll register

**DATES:** 1971-

**ARRANGEMENT:** Chronological, thereunder alphabetical by employee's name

**DESCRIPTION:**

This register is a numerical listing by check number and agency codes of all payroll checks issued by the county. It includes code, date, warrant number, name of employee, social security number, types and amounts of individual deductions, and may include hourly rate, and number of hours worked. Though this register is frequently used to reference specific payroll checks, it might be the only record of employee salaries and would then serve the same retirement purpose as the Employee earnings history files.

**RETENTION:**

Retain for 65 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**FORMAT MANAGEMENT:**

Paper: For records beginning in 1971 through 1992. Retain in Office until microfilmed and then destroy provided microfilm has passed inspection.

Microfilm master: For records beginning in 1971 through 1992. Retain in Archives for 65 years and then destroy.

Microfilm duplicate: For records beginning in 1971 through 1992. Retain in Archives for 65 years and then destroy.

Paper: For records beginning in 1992 and continuing to the present. Retain in Office for 1 year or until administrative need ends and then destroy.

Computer output microfilm master: For records beginning in 1992 and continuing to the present. Retain in State Records Center for 65 years and then destroy.

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 9878

**TITLE:** Payroll register

(continued)

Computer output microfilm duplicate: For records beginning in 1992 and continuing to the present. Retain in Office for 65 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).

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

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10541

3

**TITLE:** Payroll tax report

**DATES:** 1983-

**ARRANGEMENT:** Chronological, thereunder alphabetical by name

**ANNUAL ACCUMULATION:** 1.00 cubic foot.

**DESCRIPTION:**

This is a monthly report submitted to State Retirement on amounts contributed to retirement system. It is used for verification purposes. The Office of Education sends monthly the information on magnetic tape to State Retirement and prints a paper copy for the school district, later the Retirement Office sends the district worksheets to check data. Includes social security number, member name, fund agency, period covered, amount contributed, earnings, and amounts employee and employer paid.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Payroll processing records, GRS-1903.

**AUTHORIZED:** 07-01-2015

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after being microfilmed or until administrative need ends whichever comes first and then destroy provided microfilm has passed inspection.

Microfilm master: Retain in State Records Center for 3 years and then destroy.

Microfilm duplicate: For records beginning in 1983 through 1992. Retain in Office for 3 years and then destroy.

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10541

**TITLE:** Payroll tax report

(continued)

**APPRAISAL:**

These records have administrative value(s).

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

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 29556

1

**TITLE:** Policies and procedures

**DATES:** 2016-

**ARRANGEMENT:** none

**DESCRIPTION:**

These files contain records related to the issuance of policies and procedures and document their formulation. Includes narrative or statistical reports and studies regarding district or office operations, and related correspondence.

**RETENTION:**

Retain until administrative need ends

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

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

**FORMAT MANAGEMENT:**

**APPRAISAL:**

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

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10542

3

**TITLE:** Retirement reports

**DATES:** 1982-

**ARRANGEMENT:** Chronological, thereunder numerical by social security number

**DESCRIPTION:**

This is a monthly report submitted to State Retirement on amounts contributed to retirement system. It is used for verification purposes. The Office of Education sends monthly the information on magnetic tape to State Retirement and prints a paper copy for the school district, later the Retirement Office sends the district worksheets to check data. Includes social security number, member name, fund agency, period covered, amount contributed, earnings, and amounts employee and employer paid.

**RETENTION:**

Retain for 3 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Payroll processing records, GRS-1903.

**AUTHORIZED:** 07-01-2015

**FORMAT MANAGEMENT:**

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

Microfilm master: Retain in State Records Center for 3 years and then destroy.

Microfilm duplicate: Retain in Office for 3 years and then destroy.

**APPRAISAL:**

These records have administrative value(s).

This disposition is based on the administrative needs of the district's business administrator.



**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 10542

**TITLE:** Retirement reports

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 9879

3

**TITLE:** School board minutes

**DATES:** 1920-

**ARRANGEMENT:** Chronological

**DESCRIPTION:**

These are minutes of regular and special meetings of the Board of Education. They are used to document the actions and decisions of the Board. School board minutes record the adoption of annual budgets; the approval of expenditures; discussions of district policies. These minute books include the time and place of meeting, board members absent and present, summary of proceedings and decisions made by the board.

**RETENTION:**

Retain permanently

**DISPOSITION:**

May Transfer to Archives.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Open meeting minutes & supplementary materials, GRS-1709.

**AUTHORIZED:** 10-28-2020

**FORMAT MANAGEMENT:**

Paper: Retain in Office permanently after being microfilmed.

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

Microfilm duplicate: Retain in Office permanently.

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

**AGENCY:** Duchesne County School District (Utah)

**SERIES:** 9879

**TITLE:** School board minutes

(continued)

**PRIMARY DESIGNATION:**

Public