

## Retention and Classification Report

**Agency:** Logan School District (Utah) (595)

101 West Center Street  
Logan, UT 84321  
435-755-2301

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

22313	Audit reports
29511	Budget and finance
27240	Personnel records
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25519	Special education student files
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**AGENCY:** Logan School District (Utah)

**SERIES:** 22313

3

**TITLE:** Audit reports

**DATES:** 1917-

**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:**

Permanent. Retain until administrative need ends

**DISPOSITION:**

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 State Archives permanently with authority to weed.

**AGENCY:** Logan School District (Utah)

**SERIES:** 22313

**TITLE:** Audit reports

(continued)

**APPRAISAL:**

These records have administrative, fiscal, and/or historical value(s).  
Audit reports may be used during the next audit cycle to monitor compliance with internal control program recommendations. They document agency functions and have research value.

**PRIMARY DESIGNATION:**

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

**AGENCY:** Logan School District (Utah)

**SERIES:** 29511

1

**TITLE:** Budget and finance

**DATES:** 2014-

**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 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 fiscal value(s).

**AGENCY:** Logan School District (Utah)

**SERIES:** 27240

3

**TITLE:** Personnel records

**DATES:** 1930-

**ARRANGEMENT:** Chronological by estimated last year of employment, thereunder alphabetical

**ANNUAL ACCUMULATION:** 4.00 cubic feet.

**DESCRIPTION:**

These are the personnel files for all district employees. They are used to document employment. The files include the employment applications, authorizations for hire forms, placement records, employee history card, copies of school transcripts, pay and leave history, work performance, in-service training completion certificates and credits, evaluation records, teaching certificates, previous teaching experience, contracts, lane change requests, and related correspondence. May also include fingerprints and verification of the criminal background check.

**RETENTION:**

Retain for 65 year(s)

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Performance plans and evaluations, GRS-1966.

**AUTHORIZED:** 06-01-2017

**FORMAT MANAGEMENT:**

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

**APPRAISAL:**

These records have administrative value(s).  
Personnel files are kept for administrative purposes.

**AGENCY:** Logan School District (Utah)

**SERIES:** 27240

**TITLE:** Personnel records

(continued)

**PRIMARY DESIGNATION:**

Private

**AGENCY:** Logan School District (Utah)

**SERIES:** 29538

1

**TITLE:** Policy and procedure

**DATES:** 1991-

**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, fiscal, and/or legal value(s).

**AGENCY:** Logan School District (Utah)

**SERIES:** 22312

3

**TITLE:** School board minutes

**DATES:** 1872-

**ARRANGEMENT:** Chronological

**ANNUAL ACCUMULATION:** 0.40 cubic feet.

**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:** Logan School District (Utah)

**SERIES:** 22312

**TITLE:** School board minutes

(continued)

**PRIMARY DESIGNATION:**

Public

**AGENCY:** Logan School District (Utah)

**SERIES:** 25519

3

**TITLE:** Special education student files

**DATES:** 1997-

**ARRANGEMENT:** Chronological by student's last date of service, thereunder alphabetical by student's surname

**DESCRIPTION:**

These files document students enrolled in the district's special education programs in accordance with the provisions of 34 CFR 300.560-300.577 (2003). The records are required to receive federal and state special education funding. Services can be discontinued when student is reclassified as no longer needing special education services, the student moves, or refuses the services. They contain various reports and completed forms including individual education program records (IEPs), inspection logs, evaluation and re-evaluation forms, parental approval forms, test protocols, parent surveys, parent information, third party information, placement documents, refusal of services forms, and other legal documents required by federal regulations and state rules to verify a student's disability and need for special education services.

**RETENTION:**

Retain for 6 year(s) after separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Special education student records, GRS-1476.

**AUTHORIZED:** 11-05-2019

**FORMAT MANAGEMENT:**

Paper: Retain in Office for 1 year after last date of special education received and then transfer to State Records Center. Retain in State Records Center for 5 years and then destroy.

**AGENCY:** Logan School District (Utah)

**SERIES:** 25519

**TITLE:** Special education student files

(continued)

**APPRAISAL:**

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

This disposition is based on the legal requirements specified in 34 CFR 300.562 (2004) and the recommendations of the State Office of Education. A student can receive special education services until the age of twenty-one.

**PRIMARY DESIGNATION:**

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

**AGENCY:** Logan School District (Utah)

**SERIES:** 26563

3

**TITLE:** Student cumulative files

**DATES:** 2002-

**ARRANGEMENT:** Alphabetical by name.

**DESCRIPTION:**

These student files contain information on students attending school in the district. They are used to document student's attendance. They contain the copies of achievement test scores, the official transcript, copies of report cards, health records, and immunization cards. They are also called student cumulative cards.

**RETENTION:**

Retain for 3 year(s) after separation

**DISPOSITION:**

Destroy.

**RETENTION AND DISPOSITION AUTHORIZATION:**

Retention and disposition for this series is authorized by Archives general schedule Education performance and testing, GRS-1503.

**AUTHORIZED:** 08-01-2013

**FORMAT MANAGEMENT:**

Paper: Retain in Office until administrative need ends and then transfer to State Records Center. Retain in State Records Center for 4 years and then destroy provided official transcript has been pulled and retained.

**APPRAISAL:**

These records have administrative value(s).

**AGENCY:** Logan School District (Utah)

**SERIES:** 26563

**TITLE:** Student cumulative files

(continued)

**PRIMARY DESIGNATION:**

Exempt

Family Educational Rights and Privacy Act 20 U.S.C.1232g (2008); 34 CFR part 99 (2008)