Retention and Classification Report

Agency: Lakeview Academy (Utah) (3438)

527 West 400 North
Saratoga Springs, UT 84043
801-331-6788

Records Officer: _____

29750	Accounts payable, vendors and procurement files
29751	Bank, facility, and risk management
29752	Human resource and payroll related records
29914	Special education records
29753	Student records

AGENCY: Lakeview Academy (Utah)

SERIES: 29750 3
TITLE: Accounts payable, vendors and procurement files
DATES: 2006-
ARRANGEMENT: Alphabetical by name.
DESCRIPTION:

These records are used to pay school bills. They include copies of checks, invoices, purchase orders, and receiving reports.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Lakeview Academy (Utah)

SERIES: 29751 3
TITLE: Bank, facility, and risk management
DATES: 2006-
ARRANGEMENT: Chronological, then alphabetical.
DESCRIPTION:

These are administrative financial records. Records may include bank records, bond records, risk management and any expenses related to maintenance and improvement. They document administrative procedure and activities.

RETENTION:

Retain for 7 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

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

AUTHORIZED: 02-11-2019

FORMAT MANAGEMENT:

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

APPRAISAL:

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

These records are not permanent financial records. They document the school facility, budget, and expenditures.

PRIMARY DESIGNATION:

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Lakeview Academy (Utah)

SERIES: 29752 3
TITLE: Human resource and payroll related records
DATES: 2006-
ARRANGEMENT: Alphabetical, thereunder chronological.
DESCRIPTION:

These are the personnel files for all school employees, along with all other records related to the human resource and payroll functions. They are used to document employment, wages, benefits, and other human resource and payroll related information. The files include the employment applications, employee history, pay and leave history, work performance, evaluation records, teaching certificates, and related correspondence. Records may also include fingerprints and verification of the criminal background check. These files also include the history of benefits offered and taken, contracts with brokers and providers, and payroll reports including time cards.

RETENTION:

Retain for 65 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Employment history records, GRS-1965.

AUTHORIZED: 01-26-2023

FORMAT MANAGEMENT:

Paper: Retain in Office for 2 years and then transfer to State Records Center. Retain in State Records Center for 63 years and then destroy.

APPRAISAL:

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

These records have legal value as they document employment and eligibility for benefits as a result of such employment for the employee or for the employee's heir per Utah Code 49-11-602(2019).

AGENCY: Lakeview Academy (Utah)

SERIES: 29752
TITLE: Human resource and payroll related records

(continued)

PRIMARY DESIGNATION:

Private

SECONDARY DESIGNATION(S):

Public

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.

AGENCY: Lakeview Academy (Utah)

SERIES: 29914 3
TITLE: Special education records
DATES: 2012-
ARRANGEMENT: Chronological, thereunder alphabetical by surname.
DESCRIPTION:

These records support the agency's function to provide an environment where students with disabilities can master essential learning skills, demonstrate civic responsibility, and engage in positive personal development. Records document eligibility of students for special education services, as well as the provision of services to students. Information may include Individual Education Plans (IEPs), testing, and assessment records.

RETENTION:

Retain for 5 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: 05-22-2023

FORMAT MANAGEMENT:

Paper: Retain in Office until separation and then transfer to State Records Center. Retain in State Records Center for 5 years.

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

APPRAISAL:

These records have administrative value(s).

AGENCY: Lakeview Academy (Utah)

SERIES: 29914
TITLE: Special education records

(continued)

PRIMARY DESIGNATION:

Exempt — Exempt. 34 CFR Part 99.30,31 (2020); Utah Code 63G-2-201(3)(b)(2020)

SECONDARY DESIGNATION(S):

Protected. — Utah Code 63G-2-305(5)(2020)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 01/2020.

AGENCY: Lakeview Academy (Utah)

SERIES: 29753 3
TITLE: Student records
DATES: 2006-
ARRANGEMENT: Chronological, thereunder by student's 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.

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 separation and then transfer to State Records Center. Retain in State Records Center for 3 years and then destroy.

APPRAISAL:

These records have administrative value(s).

PRIMARY DESIGNATION:

Exempt 34 CFR 99

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 02/2019.