

Retention and Classification Report

Agency: Navigator Pointe Academy (Utah) (3446)

6844 South Navigator Road
West Jordan, UT 84088-4405
801-840-1210

Records Officer: _____

28134	Accounts payable, vendors and procurement files
28204	Bank, Facility and Risk Management
28096	Board Governance Financial Records
28205	Board Minutes and Policies
28142	Human resource and payroll related records
28143	Student records

AGENCY: Navigator Pointe Academy (Utah)

SERIES: 28134

3

TITLE: Accounts payable, vendors and procurement files

DATES: 2004-

ARRANGEMENT: Alphabetical by name

DESCRIPTION:

These records are used to pay school district bills. They include copies of checks, invoices, purchase orders, and receiving reports. May also include correspondence with vendors and computer printouts.

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

AGENCY: Navigator Pointe Academy (Utah)

SERIES: 28204

3

TITLE: Bank, Facility and Risk Management

DATES: 2005-

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 school facility, budget and expenditures.

PRIMARY DESIGNATION:

Public

AGENCY: Navigator Pointe Academy (Utah)

SERIES: 28096

3

TITLE: Board Governance Financial Records

DATES: 2005-

ARRANGEMENT: Chronological then alphabetical

DESCRIPTION:

These are financial use by the school board in governing the financial affairs of the school. These records are used to monitor the financial compliance of the school in relation to board policies, state and federal laws, and the school's charter. The records include audited financial statements, tax returns, state and federal program reports, Annual Financial Reports, and Annual Program Reports.

RETENTION:

Permanent. Retain for 3 year(s)

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

APPRAISAL:

These records have administrative, fiscal, and/or historical value(s). These are financial use by the school board in governing the financial affairs of the school. They document the history of the school's activities and finances. UCA 51-2-3(3) (2008)

AGENCY: Navigator Pointe Academy (Utah)

SERIES: 28096

TITLE: Board Goveranance Financial Records

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Navigator Pointe Academy (Utah)

SERIES: 28205

3

TITLE: Board Minutes and Policies

DATES: 2005-

ARRANGEMENT: Chronological, then alphabetical

DESCRIPTION:

These are board meeting minutes. They may include organizational files and policies.

RETENTION:

Permanent. Retain for 5 year(s)

DISPOSITION:

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 for 5 years and then transfer to State Records Center. Retain in State Records Center permanently.

APPRAISAL:

These records have administrative, historical, and/or legal value(s). Minutes, organizational files and the policies document the history of the school

AGENCY: Navigator Pointe Academy (Utah)

SERIES: 28142

3

TITLE: Human resource and payroll related records

DATES: 2004-

ARRANGEMENT: Alphabetical by name thereunder chronological for payroll

ANNUAL ACCUMULATION: 1.00 cubic foot.

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 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 Performance plans and evaluations, GRS-1966.

AUTHORIZED: 06-01-2017

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).

AGENCY: Navigator Pointe Academy (Utah)

SERIES: 28143

3

TITLE: Student records

DATES: 2004-

ARRANGEMENT: alphabetical

ANNUAL ACCUMULATION: 1.00 cubic foot.

DESCRIPTION:

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."

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 Non-transferred student files, GRS-1497.

AUTHORIZED: 10-01-1999

FORMAT MANAGEMENT:

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

APPRAISAL:

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

PRIMARY DESIGNATION:

Exempt FERPA