Retention and Classification Report

Agency: Mountain West Montessori Academy (Utah) (3640)

4125 West Foxview Drive
South Jordan, UT 84095
801-566-6962

Records Officer: _____

28616	Accounts payable
29188	Bank statements
29187	Personnel records

AGENCY: Mountain West Montessori Academy (Utah)

SERIES: 28616 3
TITLE: Accounts payable
DATES: 2014-
ARRANGEMENT: Chronological by date
DESCRIPTION:

These records support the agency's administrative function to audit the use of all public funds (Utah Code 51-2a-201 (2014)). These records document money transfers that are used to pay school district bills. Information includes check numbers, invoices, purchase orders, receiving reports, and related records.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

Paper: Retain in Office until scanned and then destroy.

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

These records have fiscal value(s).

AGENCY: Mountain West Montessori Academy (Utah)

SERIES: 28616
TITLE: Accounts payable

(continued)

PRIMARY DESIGNATION:

Public

AGENCY: Mountain West Montessori Academy (Utah)

SERIES: 29188 3
TITLE: Bank statements
DATES: 2013-
ARRANGEMENT: Chronological.
DESCRIPTION:

These records support the agency's administrative function to audit the use of all public funds (Utah Code 51-2a-201 (1)(2017)). These records are monthly financial statements showing the money received into and paid out of agency bank accounts. Information includes the bank name, total deposits and withdrawals, credit and cash balances, and related records.

RETENTION:

Retain for 4 year(s)

DISPOSITION:

Destroy.

RETENTION AND DISPOSITION AUTHORIZATION:

Retention and disposition for this series is authorized by Archives general schedule Local government accounts payable and receivable records, GRS-106.

AUTHORIZED: 08-27-2018

FORMAT MANAGEMENT:

Paper: Retain in Office for 4 years and then destroy.

Computer data files: Retain in Office for 4 years and then delete.

APPRAISAL:

These records have fiscal value(s).

AGENCY: Mountain West Montessori Academy (Utah)

SERIES: 29188
TITLE: Bank statements

(continued)

PRIMARY DESIGNATION:

Public

SECONDARY DESIGNATION(S):

Private. Utah Code 63G-2-301(3)(e)(2014)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2017.

AGENCY: Mountain West Montessori Academy (Utah)

SERIES: 29187 3
TITLE: Personnel records
DATES: 2013-
ARRANGEMENT: Alphabetical.
DESCRIPTION:

These are the personnel files for all school employees. They are used to document employment, continuing education, and career development. The files include the employment applications, authorization 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 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 1 year and then transfer to State Records Center. Retain in State Records Center for 64 years and then destroy.

APPRAISAL:

These records have administrative value(s).

These records contain the complete work history of an individual while employed (excluding medical/psychological information) and have legal value as they verify employment and/or eligibility for benefits for the employee or for any heirs as a result of such employment.

AGENCY: Mountain West Montessori Academy (Utah)

SERIES: 29187
TITLE: Personnel records

(continued)

PRIMARY DESIGNATION:

Private Utah Code 63G-2-302(1)(g)(2017)

REVIEW AND UPDATE STATUS:

This report was reviewed and updated on 07/2017.