

RECORDS RETENTION SCHEDULE

<u>TYPE OF RECORD</u>	<u>LOCAL</u>	<u>STATE</u>	<u>FEDERAL</u>
-----------------------	--------------	--------------	----------------

Business Records:

Accident Reports:

Employee	6 yrs.	6 yrs.	---
Student	6 yrs (after age of maturity for suit)	---	---

Annual Audit	6 yrs.	6 yrs.	6 yrs.
Annual Report (District)	Permanent	---	---
Application for Fed Grants	---	---	---
Bank Deposit Slips	6 yrs.	---	---
BLS Labor – monthly	---	---	1 yr.
Bond Issue Materials	Permanent	Permanent	---

Budgets:

District	6 yrs.	6 yrs.	---
SAU	6 yrs.	6 yrs.	---
Worksheets	1 yr.	1 yr.	---
Child Labor Permits	---	1 yr.	---
Class Observation Forms	1 year	---	---

Contracts: (should keep a sample permanently)

Aids	1 yr.	---	---
Custodial	1 yr.	---	---
Extra-Curricular	1 yr.	---	---
Rental Agreements	1 yr.	---	---
Secretarial	1 yr.	---	---
Teacher	1 yr.	---	---
SAU Office	1 yr.	---	---
Correspondence for Business	4 yrs.	1 yr.	---
Credit Union Applications	1 yr.	4 yrs.	4 yrs.
Deeds	Permanent	---	---
District Mtg. Minutes & Warrant	Permanent	---	---
Dues Authorization	1 yr.	---	---

Enrollment Reports:

Res. Pupil Member Form	Permanent	---	---
Fall Reports A-12-A	Permanent	---	---
Pupil Registers	Permanent	---	---
School Opening Reports	Permanent	---	---
Statistical Report A-3	Permanent	---	---
FICA Reports – Monthly	---	---	6 yrs.
Form C-2 Unemployment Wage Report (DES 100)	---	6 yrs.	---
Invoices	1 yr.	---	---

DATE:

Adopted: November 2, 2006

1st Reading

Reviewed:

Revised:

Cancellation:

RECORDS RETENTION SCHEDULE
 (continued)

TYPE OF RECORD	LOCAL	STATE	FEDERAL
Business Records: cont'd			
Form 2 Federal Funds:			(6 years)
Job Orders	1 yr.	---	---
Ledger/Journals	6 yrs.	---	6 yrs.
MS-22 Budget Form	6 yrs.	6 yrs.	---
MS-23 Budget Form	6 yrs.	6 yrs.	---
MS-25 Financial Report	Permanent	Permanent	---
Medical Benefits Application	1 yr.	---	---
Monthly Reconciliations	1 yr.	---	---
Monthly Financial Status (Reports by Building)	1 yr.	---	---
Minutes of Board Mtgs.	Permanent	---	---
Property Inventories & Record Cards	6 yrs.	---	---
Purchase Orders	1 yr.	---	---
Form 2 Federal Programs:			(6 years)
Request for Payment Vouch	1 yr.	---	---
Requisitions	1 yr.	---	---
Retirement Applications	1 yr.	1 yr.	---
Retirement Rpts – Monthly	1 yr.	1 yr.	---
School District Warrants	1 yr.	1 yr.	---
Special Trip Requests	1 yr.	1 yr.	---
Special Trip Confirmations	1 yr.	1 yr.	---
Supply Orders	1 yr.	1 yr.	---
Sub Teachers' Pay Slips	1 yr.	1 yr.	---
Student Activities Records	6 yrs.	6 yrs.	---
Telephone Log Sheets	1 yr.	1 yr.	---
Time Cards:			
Bus Drivers	6 yrs.	---	---
Custodial	6 yrs.	---	---
Secretarial	6 yrs.	---	---
Other	6 yrs.	---	---
Transportation Records	1 yr.	1 yr.	---
Travel Reimbursements	1 yr.	1 yr.	1 yr.
Form 2 Federal Funds:			(6 years)
Treasurer's Receipts- Cancelled Checks	6 yrs.	---	---
Treasurer's Report	6 yrs.	6 yrs.	---
Voucher Manifests	1 yr.	1 yr.	---
Work Orders	1 yr.	---	---
W-2's Yearly	---	---	6 yrs.
W-4 Withholding Certif.	---	---	6 yrs.
941-E Quarterly Taxes	---	---	6 yrs.

DATE: November 2, 2006 **1st Reading**
Adopted:
Reviewed:
Revised:
Cancellation:

RECORDS RETENTION SCHEDULE

(continued)

<u>TYPE OF RECORD</u>	<u>LOCAL</u>	<u>STATE</u>	<u>FEDERAL</u>
Federal Projects Papers:			
Forms 1, 1A, 2, 3, 3A, and 4 (quarterly)	5 years after submission of final expenditure report and documentation for expenditures, unless there is an ongoing audit taking place in which case all records will be maintained until final resolution (see 20U.S.C. 1232 34CFR 80.42(b)(4).		
Personnel Records:			
Applications:			
Employment	3 yrs or if employed, term of employment	---	---
Not Employed	3 yrs or if employed, term of employment	---	---
Interview Document	3 yrs or if employed, term of employment	---	---
Recommendation Letters	3 yrs or if employed, term of employment	---	---
Transcripts	3 yrs or if employed, term of employment	---	---
Attendance Records:			
Leaves	1 yr.	---	---
Request for Leave	1 yr.	---	---
Civil Rights Forms	---	---	6 yrs.
Evaluations	Term of Employment	---	---
Medical Examinations	1 yr.	---	---
Misc. Corresp. for Personnel	4 yrs.	---	---
Record of Leave—Supts.	1 yr.	---	---
Re-employment Letter of Assurance to Employees	1 yr.	---	---
Staff Development Plan	Term of Plan	---	---
Substitute Lists	6 years	---	---
Teachers' Record Cards	Term of Employment	---	---
Teachers' Mater Contracts	Length of Contract (suggest you keep 1 copy permanently)		
Termination Forms	6 years.	---	---
Student Records:			
Early Release Forms	1 yr.	---	---
Emergency Procedure Form	1 yr.	---	---
Examples of Student's Work	1 yr.	---	---
Health & Physical	Term of Enrollment	---	---
Shot Records	Term of Enrollment	---	---
National Honor Society:			
Applications	1 yr.	---	---
Awards	1 yr.	---	---
Permanent Record Cards:			
Progress	Permanent	---	---
Attendance	Permanent	---	---
Test Scores (standardized)	Permanent	---	---
Academic	Permanent	---	---

Adopted: November 2, 2006
Reviewed:
Revised:
Cancellation:

1st Reading

RECORDS RETENTION SCHEDULE
 (continued)

TYPE OF RECORD	LOCAL	STATE	FEDERAL
Student Records: cont'd			
Misc. Evaluation Material	Term of Enrollment	---	---
Co- & Extra Curricular Activities	Term of Enrollment	---	---
Anecdotal Records:			
Disciplinary Reports	Term of Enrollment	---	---
Medical Reports (doctor)	Term of Enrollment	---	---
Excuses (parental)	Term of Enrollment	---	---
Insurance Forms	Term of Enrollment	---	---
Post High School Placement:			
Information & Follow-up	6 yrs.	---	---
Registration Form	1 yr.	---	---
Application—Free Lunch	---	3 yrs. plus current fiscal year	
Application—Reduced Lunch	---	3 yrs. plus current fiscal year	
Special Needs Student Records:		(As a minimum, these records for special needs students should be kept as long as the student is in a program and there is district liability for the education of the student. Given court decisions that are retroactive, you might be prudent to preserve for at least six (6) years after termination or program completion)	
<ul style="list-style-type: none"> - Index of Documents - Log of People who have reviewed material in ea. folder - Notification to Parent of mtg. to discuss student's program w/ placement team - Permission to Test Form - Student Referral Form - Diagnostic Form: <ul style="list-style-type: none"> o Accumulation of Data o Psychological Exams o Learning Disabilities Tests - Team Meeting Notes - Spedis Forms - IEP's - Teacher/Student Comments - Correspondence - Out-of-District Progress Rpts. 			
Vocational Education:			
AVI Forms	1 yr.	---	---
Center Regional Contracts	20 yrs.	---	---
Equipment Inventories	5 yrs.	---	---
Federal Forms	---	---	6 years

Adopted: DATE: November 2, 2006 **1st Reading**
Reviewed:
Revised:
Cancellation: