

## Records Management

The district records officer will have the responsibility for the safekeeping of all records according to the retention schedule cited below. The district records officer will have authority to dispose of materials after the recommended retention period.

Official public records have a statutory minimum retention of 6 years. The retention period for office files and memoranda is based on operational requirements for each office. Whenever applicable, the retention period starts with the "cut-off." "Cut-off" is a term used to indicate files or records may be terminated on a predetermined date. "Cut-off" prevents current records from attaining unmanageable size and facilitates the filing of new records. Calendar year records may be "cut-off" on December 31, and a new file established on January 1; all fiscal year records can be "cut-off" only upon the completion of an action or event, such as termination of contract, final payment of a contract, termination of employment, etc. Regardless of the duration of the retention period, records series should be kept in office files after "cut-off" only as long as is necessary to satisfy (1) active reference, (2) audit, when required, and (3) other operational requirements. Once these three factors have been satisfied, the records should be transferred to a records center for the remainder of the retention period.

The retention period shall be as follows:

### Student Records

Student permanent record.....	permanent
Cumulative record.....	5 years after
graduation or withdrawal from high school	
Special services records .....	5 years after
graduation or service has been terminated	
Student discipline records .....	2 years

### Teacher Records

Elementary teacher grade books .....	3 years
Secondary teacher grade books.....	5 years after
graduation	
Lesson plan books .....	1 year
Faculty handbook .....	until superseded

### Individual Schools

Attendance card .....	3 years
Daily attendance report.....	until after audit
Field trip authorization (parent) .....	1 year
Use of private vehicles .....	1 year

### Food Services

Cafeteria receipt books .....	6 years
Daily lunch and milk count report .....	3 years
Free or reduced price lunch applications .....	3 years
Meal ticket log .....	3 years
Purchase orders .....	6 years
Reimbursement claims .....	6 years
Revenue and expenditure ledger .....	6 years
Time cards .....	6 years

Health Office

Accident injury report .....	5 years after child's 21st birthday
Medication request .....	5 years
Student health card .....	until graduation

Maintenance

Engineering & architectural drawings .....	as long as district retains property
Maintenance folder on building .....	6 years
Work order request .....	6 years
Mileage claim form .....	6 years
Vandalism report .....	3 years
Laundry checklist .....	6 years
Boiler vessel record .....	until boiler is disposed of
Budget request .....	2 years
Rental of school facilities .....	3 years

Transportation

Bus fuel reports .....	2 years
Bus schedules .....	4 years
Employee time sheet .....	2 years
Bus time sheet .....	4 years
Transportation reports .....	3 years
Purchase orders .....	6 years
Accident reports .....	3 years
Transportation requests .....	6 years

Accounting Services

Canceled checks .....	6 years
Check register .....	6 years
Voucher forms .....	6 years – (used as claims and supporting invoices)
Consultant contracts .....	6 years
Purchase order .....	6 years
Warrant registers .....	6 year
Record of part-time students .....	until after audit
Classroom count report .....	until after audit
Records supporting ESEA Title I & Title III claims .....	5 years
Records supporting NDEA Title Va., ESEA Title II claims .....	3 years
Textbook and library book inventories .....	useful life of each item
Cash receipts transmittal forms .....	6 years
Monthly transmittal of district receipts .....	3 years
District invoice .....	6 years
Trial balances .....	3 years
Receipt books .....	6 years
County Treasurer Financial Reports .....	6 years
State apportionment .....	6 years
Banking records .....	6 years
State Auditor's Reports .....	5 years

General ledger ..... 6 years  
Deposit slips ..... until after audit

Personnel Services

Employee file ..... 6 years  
Employment interview forms ..... 2 years  
Employment requisition ..... 2 years  
Letters of resignation ..... 6 years  
Absence record ..... 6 years  
Employee history card ..... 6 years  
Application for employment ..... 6 years (hired) – 2  
years (non-hired)  
Letters of recommendation ..... termination plus 6  
years  
Employee contracts ..... 6 years  
Professional credit application ..... 6 years  
Title IX and Affirmative Action surveys ..... 6 years

District Payroll

Employee record ..... 6 years after  
termination  
Personnel pay history record ..... permanent  
Personnel action form ..... 6 years after  
termination  
Time cards ..... until after audit  
Payroll work report ..... 6 years  
Teacher sub report ..... 6 years  
Payroll warrant register ..... 6 years  
Warrant request form ..... 6 years  
Tax sheltered agreements ..... 4 years after  
expiration  
Jury or military service agreements ..... 6 years  
Garnishments ..... 6 years  
Retirement forms ..... 6 years  
Labor & industry quarterly report ..... 6 years  
Medical insurance listings ..... 6 years  
Payroll deductions ..... until termination  
Labor & industries accident claims ..... permanent  
Federal tax returns ..... 4 years

Budget Services

Final budget ..... permanent  
Annual report of school funds ..... 6 years  
Monthly financial reports to board ..... permanent  
Budget status report ..... 2 years  
Bids and formal quotes ..... 6 years  
Purchasing requisition ..... 3 years  
Purchase orders ..... 6 years  
Inventory list of district property ..... 6 years after  
superseded

District

Copies of board minutes and resolutions .....	permanent
Verbatim transcripts of meetings .....	6 years

Associated Student Body

Audits .....	5 years
Banking records .....	6 years
Minutes of meetings .....	permanent
Purchase authorizations .....	6 years
Receipts .....	6 years
Invoices .....	6 years
Vouchers .....	6 years
General ledger .....	6 years
Warrants .....	6 years
Budgets .....	permanent

**Date: March 24, 2014**