

**RECORD RETENTION SCHEDULE  
(BY CATEGORY)**

**STUDENT RECORDS**

<b>RECORD TYPE</b>	<b>RETENTION PERIOD</b>	<b>RESPONSIBLE PARTY</b>	<b>MSA SCHEDULE</b>
Permanent student record card – essential student information such as name, address, etc.	Permanent	School Office	L.41
Permanent student record/transcript. All information above, plus: attendance, classes taken, grades, substantive communications to and from parents, and sports participation.  Also include Title I services, migrant services, vocational ed., other items at local discretion	Permanent	School Office/Last school attended	A.27.c; L.27; L.06.g; L.08; L.63
Discipline records – substantive (i.e., detention, suspension, expulsion, behavior contracts); letters regarding excessive absences; and administrator/teacher notes regarding students	Permanent	School Office	L.11.b; L.37; L.38.c.; L.65
	Until student graduates ( if special ed. student, retain with special ed. records	School/Spec. Ed. Office	L16; L.38.a; L.38.b.; L.58
Special education records (including all records above)	Until age 26	Special Ed./School Office	L.55
Record of student education records released, including date and recipient	Permanent	Spec. Ed./School Offices	L.44
Adult education/GED student record (names, grades, classes, attendance)	Permanent	Adult Education Office	L.04; L.23
RSU student attendance registers	Permanent	School Office	L.53
Records of home instruction students	Permanent	School/Central Office	L.25
Lists of students retained in grade/review committee files	Permanent	School Office	L.46;L.47
Class rank lists	Permanent	School Office	L.14
Honor rolls	Permanent	School Office	L.26
Student health record: accidents, illnesses, injuries, treatment, vaccinations, medications received and behavior plans, records related to use of trainers/sports medicine	Until age 26	School Office/ School Nurse	L.24; L.01.b; L.06.a; L.06.e; L.13
Student Assistance Team records – for individual students	Until age 26	School Office	L.57
Work permits	Until student turns 18	Central Office	L.66
Child abuse reports	10 years (same as DHS)	Special Ed. Office	L.12
Truancy records	6 years	School Office	L.64
Student insurance records – records generated by purchase of school-sponsored student insurance	6 years	School Office	L.59

## STUDENT RECORDS (cont.)

RECORD TYPE	RETENTION PERIOD	RESPONSIBLE PARTY	MSA SCHEDULE
Registration for recreational activities	6 years	School Office	L.45
Permission slips (field trips, etc.)	6 years	School Office	L.40
Kindergarten screening records	5 years	School Office	L.31
Driver education records	2 years	School Office	L.18
Records of buses taken by students	2 years	School Office	L.10
Registration/emergency cards	Current year	School Office	L.05
Registration cards – tuition students	Current year	School Office	L.17
Attendance cards – info transferred to permanent record	Current year	School Office	L.07
Student class schedules	Current year plus 1 year	School Office	L.48
Student excuse notes (late/absent/dismissed)	Current year	School Office	L.19
Scholarships awarded	Current year	School Office	L.49

## EMPLOYEE RECORDS

RECORD TYPE	RETENTION PERIOD	RESPONSIBLE PARTY	MSA SCHEDULE
Employment history, including dates of employment, salary history, full-time/part-time status, retirement/pension records	60 years unless notified person died, in which case, 10 years after death	Central Office	A.53.a
Employee health records	60 years	Central Office	A.36.b
Personnel records other than employment history above (courses, workshops, etc.)	6 years after termination (or in accordance with applicable contract)	Central Office	A.53.b
Workers compensation – long-term claims not finalized by lump sum	20 years after last payment	Central Office	A.71.c
Workers compensation – lump sum/other claims, including first report, other records	1 year after case closed	Central Office	A.71.b
Workers compensation – first report of injury, but no lost work time and no other records	1 year after case closed	Central Office	A.71.a
Accident reports – reports completed when employees are injured on school property	6 years	Central Office	L.01.a
Volunteer files – service of individuals	6 years after separation	Central Office	A.65
Employee drug tests	5 years	Central Office	A.31
Records regarding clothing provided by employer, including uniform/clothing allowances	3 years	Central Office	A.24
I-9 forms	3 years after hire, or 1 year after termination	Central Office	A.53.c
Employment applications for persons not hired – cover letter, application form, references, etc.	2 years (MSMA recommends 3 years)	Central Office	A.06
Report of substitute teachers employed	1 year	Central Office	L.61
Teacher registers – list of teachers and assignments	Until state reports filed	Central Office	L.62

## EMPLOYEE RECORDS (cont.)

<b>RECORD TYPE</b>	<b>RETENTION PERIOD</b>	<b>RESPONSIBLE PARTY</b>	<b>MSA SCHEDULE</b>
Substitute folders – teacher instructions, lesson plans, etc.	Current year	School Office/ Individual Teachers	L.60
Employee calendars	Current year	School Office/ Employees	A.02
Wellness programs – employee participation records	Current year	Central Office	A.70
Vacation/holiday schedules – use of leave time	Current year (or in accordance with contract or procedures)	Central Office	A.64
Duty rosters/extracurricular assignments	Current year	School Office	L.02.b
Job descriptions – no grievances pending	Current	Central Office/ School Office	A.41.a
Job Description – grievance pending	In accordance with applicable contract terms	Central Office	A.41.b
Training/In-Service programs offered	Current	Central Office/ School Office	A.61
Collective bargaining contracts	Permanent	Central Office	A.63

## SCHOOL BOARD RECORDS

<b>RECORD TYPE</b>	<b>RETENTION PERIOD</b>	<b>RESPONSIBLE PARTY</b>	<b>MSA SCHEDULE</b>
Board meeting/committee meeting minutes	Permanent	Central Office	A.46; L.50.a; L.50.b
Notes taken for purpose of preparing minutes	Until transcribed	Central Office	A.45
Board meetings – verbatim transcript created at direction of board	Permanent	Central Office	A.56.c
Video/audio recording of official board meetings w/o verbatim	5 years w/o verbatim transcript	Central Office	A.56.a
Recordings of meetings w/verbatim transcript	Until transcribed if verbatim transcript	Central Office	A56.b
Board policies	Permanent	Central Office	L.02.d
Accreditation Reports	Permanent	Central Office	L.50.d
Reports and studies commissioned by board related to policy, curriculum, special studies	Permanent	Central Office	L.50.c
Member appointments/oaths	25 years	City/Town Office	A.07
Agenda (Board/committees)	6 years	Central Office	A.04
Crisis response plan	5 years after each revision	Central Office	L.50.e
Annual reports of school unit	Permanent	Central Office	A.05
Documents related to “unique or special traditions of district”; school scrapbooks	Permanent	Central Office/ Library	L.02.e; L.34.c
Records of health emergencies and disasters	Permanent	Central Office	A.36.c
Administrative files documenting policy-making and implementing activities	Permanent	Central Office/ School Offices	A.02.c

## ADMINISTRATIVE RECORDS

<b>RECORD TYPE</b>	<b>RETENTION PERIOD</b>	<b>RESPONSIBLE PARTY</b>	<b>MSA SCHEDULE</b>
Insurance policies – general liability	30 years after exp.	Central Office	A.39.a; L.29
Immunization clinics/health screenings sponsored by district – records of persons evaluated or treated	10 years	Central Office	A.36.b
Insurance policies – other than liability	6 years after exp.	Central Office	A.39.b; L.29
Insurance claims	6 years after settled	Central Office	A.38
Legal Files - Records of all legal actions in which the school district has been involved, including certified mail receipts	6 years after resolution	Central Office	L.32
Federal/State grant documents – including adult ed.	6 years after close	Central Office	L.21; L.03
Accident reports – non-student/employee personal injury	6 years	Central Office	L.01.c
Accreditation Committee/Teacher Support Team records – policymaking/implementing activities	6 years	Central Office	L.02.c
Insurance company correspondence	6 years	Central Office	L.28
Local reports filed with MDOE	6 years	Central Office	L.35
Regulatory statistics maintained for state/federal agencies (i.e., affirmative action, non-discrimination)	6 years	Central Office	A.57
Legislative information on issues of concern to district (pending and passed)	4 years	Central Office	L.33
Federal/state grant records – sought and obtained	3 years	Central Office	L.21
Food service records – all records of school food service program	3 years	Central Office/ Food Service	L.22; L.52
Title I records – statistical/summary information	2 years	Central Office	L.11.a
Staff meeting minutes – routine (i.e., administrative team meetings)	2 years	Central Office	A.47
“Substantive” correspondence – letter and memos documenting actions taken by board/district	Varies; see specific record type	Central/School Offices/Technology Director	A.27.b
“Transitory” correspondence – letters of transmittal/ thanks, requests for information, certified mail receipts, letters of application	1 year	Central/School Offices/Technology Director	A.27.a
Safety/labor citations based on inspection of facilities	Current, plus 1 year (if not fixed, do not destroy)	Central Office	A.42
Administrative meeting schedules	Current year	Central/School Offices	A.02
Faculty/Dept. Head meeting agendas, minutes, etc.	Current year <sup>10</sup>	School Office	L.20
Telephone logs	Current year	Central/School Offices	L.02.b
Faculty committee lists	Current year	Central/School Offices	L.02.b

## LIBRARY RECORDS

RECORD TYPE	RETENTION PERIOD	RESPONSIBLE PARTY	MSA SCHEDULE
Student yearbook (non-circulating copy)	Permanent	School Librarian	L.34.e
Book/tape/DVD circulation records	Until material returned	School Librarian	L.34.a; L.34.b; L.34.d
Scrapbooks	Permanent	School Librarian	L.34.c

## CURRICULUM RECORDS

RECORD TYPE	RETENTION PERIOD	RESPONSIBLE PARTY	MSA SCHEDULE
Innovative/new/experimental programs – syllabi, lesson plans, etc. – introductory year only	Permanent	School Office	L.15.b
Permanent files - files maintained by school officials for individual curriculum or program areas	Current year plus 3 years	School Office	L.43
Parent Night records – attendance, program, etc.	Current year	School Office	L.39
Teacher routine curriculum materials – syllabi, lesson plans, etc.	Current year	Individual Teachers	L.15.a

## FINANCIAL RECORDS

RECORD TYPE	RETENTION PERIOD	RESPONSIBLE PARTY <sup>1</sup>	MSA SCHEDULE
Final audit reports	Permanent	Central Office	A.08
Working documents to produce final audit report	7 years	Central Office	A.09
Final annual budgets	Permanent	Central Office	A.18.a
Working documents to produce final budget – including original school/dept. requests	6 years	Central Office	A.18.b
Ledgers/journal entries – summary accounting records w/line item totals	Permanent	Central Office	A.44
Cash sheets/account records to produce permanent ledger	7 years	Central Office	A.20
Leases	Permanent	Central Office	A.43
School trust fund records	Permanent	Central Office	L.54
Contracts – services, goods, leasing property, etc.	6 years after completion	Central Office	A.26
Bond records – financial (representing funds invested)	6 years after expiration	Central Office	A.15
Bond records – performance (insurance against temp. theft)	6 years after expiration	Central Office	A.16
Warrants – financial and treasurer	6 years	Central Office	A.67
Expense account vouchers and supporting docs for employees and board members	6 years	Central Office	A.33

## FINANCIAL RECORDS (cont.)

RECORD TYPE	RETENTION PERIOD	RESPONSIBLE PARTY	MSA SCHEDULE
Vouchers – authorization to pay financial obligations	6 years	Central Office	A.66
Canceled checks or images; deposit slips	6 years	Central Office	A.23; A.29
Bank reconciliations	6 years	Central Office	A.10
Bids by vendors to provide goods and services	6 years	Central Office	A.12
Bills – payments to and from district	6 years	Central Office	A.13
Receipts – payments made and received by district	6 years	Central Office/ School Offices	A.55
Payroll – all records used to create payroll	6 years	Central Office	A.52
Bills of sale – property owned by district	6 years	Central Office	A.14
Student activity account records	3 years	School Office	L.56

## FACILITIES/EQUIPMENT RECORDS

RECORD TYPE	RETENTION PERIOD	RESPONSIBLE PARTY	MSA SCHEDULE
Aerial photos of land use – official; not casual photos	Permanent	Central Office	A.03
Property deeds and related documents	Permanent	Central Office	A.28
Mortgages and discharges	Permanent	Central Office	A.48
Site plans – approved	Permanent	Central Office	A.60.a
Site plans – work in progress/superseded by changes	Until no longer needed	Central Office	A.60.b
Building and grounds maintenance/improvement records	Life of facility or transfer to new owner	Central Office	L.09
School construction records – plans and related documents that provide history of project	Life of facility or transfer to new owner	Central Office	L.51
Chemical identification list and related MSDS and documents	20 years	Central Office	A.35.b
Depreciation schedules – non-real property	6 years after disposal	Central Office	A.30
Inventories – capital/minor equipment, other non-real property	6 years	Central Office	A.40
Property records – documents for purchase/maintenance for property documented on inventory; not real estate	6 years	Central Office	A.54
Maintenance Dept. records	Current year plus 3 years	Maintenance Office	L.36
Equipment records – vehicles, computers, etc. related to purchase, maintenance, upgrades	2 years after disposal	Central Office	A.32
Inventories – books, furniture, etc.	Current year	Central Office	L.30
Facility use schedules	Current year	Central Office	A.02
MSDS sheets	Chemicals currently in use – retain	Central Office	A.35.a

## ATHLETIC RECORDS

<b>RECORD TYPE</b>	<b>RETENTION PERIOD</b>	<b>RESPONSIBLE PARTY</b>	<b>MSA SCHEDULE</b>
Coach reports, summaries, game outcomes	Permanent	Athletic Director	L.06.c
Parent permission for child to participate in athletics	6 years	Athletic Director	L.06.f
Game income	4 years	Athletic Director	L.06.d
Budget and fiscal records	2 years	Athletic Director	L.06.b

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