

Records Management

The district records officer shall have the responsibility for the safekeeping of all records according to the retention schedule cited below. The district records officer shall 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

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| Student permanent record | Permanent |
| Cumulative record | 5 years after graduation or withdrawal from high school |
| Confidential reports and records | 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| Faculty handbook | Until superseded |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

| | |
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| 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

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|------------------------------|-------------------------------------|
| Accident injury report | 5 years after child's 21st birthday |
| Medication request | 5 years |
| Student health card | Until graduation |

Maintenance

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|--|--------------------------------------|
| 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

| | |
|---|---|
| Cancelled 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 years |
| 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 |

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| 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 Service

| | |
|---|---------------------------------------|
| 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 (nonhired) |
| 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

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|---|---------------------------|
| 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

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| Final budget | Permanent |
| Annual report of school funds | 6 years |
| Monthly financial reports to board | Permanent |

Budget status report2 years

Purchasing

Bids and formal quotes6 years

Purchasing requisition3 years

Purchase orders6 years

Inventory list of district property6 years after superseded

District

Copies of board minutes and resolutionsPermanent

Verbatim transcripts of meetings6 years

Associated Student Body

Audits5 years

Banking records6 years

Minutes of meetingsPermanent

Purchase authorizations6 years

Receipts6 years

Invoices6 years

Vouchers6 years

General ledger6 years

Warrants6 years

BudgetsPermanent