

Regulation

Public Information Program

2100.2-R

RECORDS AVAILABLE FOR PUBLIC INSPECTION

The following is a subject matter list, by subject, of records in possession of the BOCES.

Attendance

- Parent's signed consent for pupil to participate in a specific activity or parent's signed request for pupil to be excused from participation in a specific activity -- including but not restricted to such activities as field trip, released time for religious observance or education, authorization to not ride regular bus or to ride an alternate bus, etc. when no accident report or notice of claim has been filed involving such consent or request (A parent's signed consent or request that may be related in any way to an accident should be filed with the accident report or notice of claim and retained until the report or claim can be destroyed).
- Written excuse from parent explaining absence of pupil.
- Register of attendance.
- Teacher's daily report of pupils absent made for the preparation of the daily absence list.
- Daily absence list showing all pupils reported as absent for that day and distributed for the information of teachers.
- Pupil registration card.

Audit

- Report of audit or examination by State Comptroller of financial affairs of municipal corporation pursuant to Section 35 of the General Municipal Law.
- Report of audit or examination of financial affairs of a public corporation, other than that made by the State Comptroller pursuant to Section 35 of the General Municipal Law.

Budget

- Copy of annual budget where the budget is part of the minutes.
- Annual estimate of revenues and expenditures submitted for inclusion in annual budget.

Buildings

- Fire inspection report of school facilities.
- Certificates of occupancy for all BOCES facilities.
- Fire drill report showing date of drill, time of drill, total length of time to evacuate buildings, and any other pertinent information, when no investigation or litigation involving a fire is pending.

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- Fire drill instructions setting forth specific directions and rules of conduct to be observed during fire drills by teachers and pupils, when no investigation or litigation involving a fire is pending.

Curriculum

- Course outline submitted for State Education Department approval of special course of study.
- State Education Department approval of special course of study.
- Project registration form registering lieu or experimental vocational school course with the State Education Department.

Equipment Inventories

- Property inventory card or sheet covering item of movable equipment when card or sheet became obsolete or items of movable equipment has been disposed of.
- Property inventory, when inventory has become obsolete.
- Perpetual property inventory, when inventory was replaced.
- Purchase orders used for the purchase of new equipment.

Examinations

- Local and state examination papers.

Finance

- Copy of annual financial and statistical report of the board of cooperative educational services.
- General control ledger.
- Special fund ledger.
- Appropriation and expenditure ledger.
- Distribution ledger showing itemized receipts and payments.
- Voucher register showing numerical listing of vouchers.
- Register of checks.
- Canceled check or other instrument of payment, such as bank check, warrant check, order check, and order to fiscal officer to pay when used as negotiable instrument (except for trust funds).
- Designation of depository by the governing body of a public corporation, designating the bank or other depository in which public funds are to be deposited.
- Deposit book for a closed checking account.
- Duplicate deposit slip.
- Monthly bank statement reconciliation.
- Bank statement.
- Treasurer's monthly report.
- Receipts for funds remitted to fiscal officer.
- Application for shared service showing approval.

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- Employee's claim for reimbursement for travel.
- Source documents used as intermediate working tools to produce journals, registers, ledgers, accounting and payroll reports, payrolls, and payroll checks.
- End-of-year reports for State and Federal programs Insurance.
- Pupil accident report covering school accidents.
- Boiler or machinery inspection report made by insurance company or made at the request of an insurance company, board of cooperative educational services.
- Certificate of insurance certifying as to name of insured, kind of insurance, limits of liability, date of expiration and policy number, when no outstanding claim is involved, other than a certificate of insurance certifying as to a surety bond or other contract of insurance against fraud or mistake.
- Fire insurance policy, when no outstanding claims are involved.
- Water damage insurance policy, when no outstanding claims are involved.
- Burglary and theft insurance policy, when no outstanding claims are involved.
- Glass insurance policy, when no outstanding claims are involved.
- Boiler and machinery insurance policy, when no outstanding claims are involved.
- Collision insurance policy, when no outstanding claims are involved.
- Motor vehicle insurance policy, then no outstanding claims are involved.
- Property damage liability insurance policy when no outstanding claims are involved.
- Personal injury liability insurance policy when no outstanding claims are involved.
- Worker's compensation and employer's liability insurance policy when no outstanding claims are involved.
- Records relating to worker's compensation case of a professional or nonprofessional employee Plan document related to Jefferson-Lewis, et. al. School Employees' Healthcare Plan.

Legal

- Contract (expired) for personnel services between employee and board of cooperative educational services.
- Expired lease wherein a public corporation either rents or leases quarters from outside owners.
- Canceled leases where no litigation is involved.
- Expired agreement between public corporation and second party providing for payment of stipulated sum of money in consideration of services rendered, when no litigation or outstanding claim is involved.

Miscellaneous

- Copy of minutes of meetings of Board of Cooperative Educational Services when original minutes are preserved permanently in the minute book.

Payroll

- Copy of Annual Report to the New York State Teachers Retirement System showing list of teachers who are members of System, salaries and rates of contribution.

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- Copy of information extracted from the payroll and furnished the New York State Employees' Retirement System each payroll period.
- Payroll report for payroll period showing absences and substitutes where information regarding absence is posted to individual's cumulative leave record and information regarding substitute is recorded on substitute's personal earnings record.
- Employee's personal earnings record used to prove at end of year total earnings, retirement deductions and taxes withheld.
- Employee's Withholding Exemption Certificate (Form W-4 U. S. Treasury Department, Internal Revenue Service).
- Employees copy of Withholding Tax Statement (Federal taxes withheld from wages) (Form W-2, Copy D, U. S. Treasury Department, Internal Revenue Service).
- Employer's Quarterly Federal Tax Return (Form 941 U.S. Treasury Department, Internal Revenue Service).
- Duplicate copy of payroll, when original payroll is retained Personnel.
- Application for employment for professional or nonprofessional position when applicant was not hired.
- Professional or nonprofessional personnel record, when employee has retired, resigned or died, or is no longer engaged as a substitute employee, including but not restricted to application form, copy of teaching certificate, transcript of educational record, evaluation of training, ratings of probationary period, health examinations, indication of personal interests and activities, schedule of class and co-curricular assignments, civil service records, retirement records and related correspondence, BUT NOT INCLUDING any record containing a loyalty statement or question pertaining to loyalty made pursuant to Rules of the Board of Regents and/or records relating to workmen's compensation case.
- Loyalty statement or question pertaining to loyalty relates to past or present membership in an organization listed as subversive by the Board of Regents or participation in the subversive activities of such an organization. This should not be confused with the oath of affirmation prescribed by section 3002 of the Education Law relating to the support of the Federal and State Constitutions and the faithful discharge of teaching duties.
- Professional or nonprofessional personnel record containing a loyalty statement or question pertaining to loyalty (made pursuant to the Rules of the Board of Regents) when employee has retired, resigned or died.
- Expired civil service eligibility list.
- Employee's time cards, sheets, or books when information is posted to summary record.
- Periodic record of employee's absences where data have been posted to employee's individual cumulative leave card.
- Weekly, semi-monthly, or monthly cumulative employees' time summary record
- Teacher's annual signed statement indicating intention to teach.

Purchasing and Paying

- Contract for purchase of materials used in capital construction Specifications for materials to be used in capital construction.

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- Bid, successful, in connection with purchase of materials used in capital construction.
- Extra copies of contracts, specifications, maps and plans of capital construction where the original copy is retained.
- Contract for purchase of materials, supplies and services not connected with capital construction.
- Specifications for materials, supplies and services not connected with capital construction.
- Bid, successful, in connection with purchase of materials; supplies and services not connected with capital construction.
- Bid, unsuccessful, in connection with purchase of materials, supplies and services.
- Purchasing office's copy of purchase request, requisition, estimate or similar record used to submit purchase requirement.
- Register, summary, schedule, or similar record created by purchasing office to list invoices or similar records received by purchasing office.
- Paying office's copy of purchase order or similar record used to obtain materials, supplies or services.
- Purchasing office's copy of purchase order or similar record used to obtain materials, supplies or services.
- Copy of purchase order or similar record used to obtain materials, supplies or services, except copy retained by paying office and one copy retained by purchasing office.
- Invoice or similar record notifying purchasing office of materials or supplies shipped or sent.
- Packing slip, shipping ticket, copy of bill of lading or similar record transmitted or packaged with shipment of materials or supplies.
- Claim for payment, including claim, vendor's voucher and bill.
- Order on fiscal officer to pay moneys, including order to pay and warrant to pay.
- Duplicate copy of check used in place of check stub.
- Quotation or similar informational record received from vendor by purchasing office.

Transportation

- Transportation contract between board of cooperative educational services and private carrier which is approved by Division of Educational Management Services. and used as a basis for apportionment of state aid, including affidavit of publication of notice regarding transportation contract, notice to bidders, and proposal or bid for described transportation.
- Application for approval of bus capacity and bus purchase and forms previously used for like purposes.

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Jefferson-Lewis-Hamilton-Herkimer-Oneida Board of Cooperative Educational Services
 Legal Ref: Article 57-A of the Arts & Cultural Affairs Law; Article 6 of the Public Officers' Law; Education Law §§ 2116, 2116-A; 8 NYCRR §185.12.
 Approved by the District Superintendent: 07/15/97, 06/21/17