



RECORD RETENTION

The following operating procedures are in accordance with SP 3580 / AR 3580(a-b):

Classification of Records

- Records can be classified into one of three categories:
 - Class 1: Permanent Record
 - Class 2: Optional Record
 - Class 3: Disposable Record
- Permanent records include, but are not limited to; Annual Reports, Office Actions, Personnel Records (Employees, Students), and Property Records.
- Optional records include any record worth keeping which is not classified as Permanent; Optional records shall be retained until re-classified as Disposable.
- Disposable records include all records not classified as Class 1 or 2.
- Refer to AR 3580(a-b) for further detailed guidelines of the type of records included per classification.
- The California Association of School Business Officials (CASBO) publishes a Records Retention Manual, which provides record retention requirements and can also be used as a reference tool when classifying records. The manual can be ordered from their website at: <http://www.casbo.org>

Storage & Retrieval

- Currently, the BCOE old Jail building is used to store boxed records. If a department or program has a need to store boxed records, a request for storage can be placed with the Maintenance & Operations (M&O) department.
- Individual departments are responsible to purchase any necessary boxes for storage; for ease of storage and consistency, storage boxes need to be the standard size (10" x 12" x 15").
- A "Request for Box Storage" form (BSF-26) should be filled out and emailed to the Support Services Clerk in the M&O department.
 - As guidance when filling out the form:
 - if it is a Permanent Record, indicate "Class 01" as the "Disposition Code";
 - if it is a record that can be Disposed, indicate "Class 03" as the "Disposition Code", and also indicate in the "Dispose On" area the fiscal year it should be destroyed; all files to be destroyed should indicate a **July 1, 20__** disposal date (ie: July 1, 2014).
 - Records that will be disposed and permanent records should not be stored in the same storage box.



Operating Procedures

- Indicate if the record has been scanned; (hard copy of scanned records has to be stored for at least 4 years)
- Upon receipt of the completed Box Storage form, M&O will review the list of records to be stored (for compliance with record retention regulations), and then assign the form a Box Number.
- Once the Box Storage request has been assigned a Box Number, M&O will print the form and return to the requesting department to adhere to the storage box.
- The Box Storage form is assigned a number as part of the Record Retention logging system maintained by M&O for easy tracking and retrieval of records.
- After a number is assigned, and the Box Storage form is attached to the storage box, an [online workorder](#) can be placed with M&O to pick up the box (or boxes) and move to the Jail storage. In the workorder, be sure to reference which Box Number(s) need to be picked up, and their current location, to ensure that M&O has clear direction of which boxes are to be moved to storage.
- Once the box has been stored, if a department has a need to retrieve a stored record, place an [online workorder](#) with M&O requesting the specific Box Number needed and where to deliver. If the Box Number is not known, contact the M&O department or Administrative Services prior to submitting a workorder, and the Record Retention logging system can be researched to find the specific Box Number required.

Disposal of Records

- Disposal of stored records is completed in the month of July, on an annual basis. Stored records marked for destruction will be shredded, burned, or taken to the local dump and buried; if buried, an M&O technician is present to witness the burial, per record destruction regulations.
- Any boxed records that have been destroyed are noted in the Record Retention logging system.