

ABCD-E - BOARD DOCUMENTS RETENTION SCHEDULE

Description of Record	Retention Deadline	Destruction Method	Record Administrator
1099s	13 yrs after CFY	Shred	Business Manager
Annexation, Reorganization, and Dissolution Committee Material	Permanently	n/a; file copy with state archives	Business Manager
Annexation, Reorganization, and Dissolution Plans/Agreements	Permanently	n/a; file copy with state archives	Business Manager
Board correspondence	3 yrs after CFY	Recycle	Business Manager
Board Election Ballots (including absentee)	Retain one copy permanently; ballots completed by voters retain 22 months	Shred	Business Manager
Board Election Notices	45 days after election	Recycle	Business Manager
Board minutes	Permanently	n/a	Business Manager
Budgets	10 yrs from date of approval	Recycle	Business Manager
Certificate of election	Retain for 10 yrs after CFY	Send to state archives	Business Manager
Committee Meeting Minutes	Retain for 10 yrs after CFY	Send to state archives	Business Manager
Election Official Oaths	45 days after election	Recycle	Business Manager
Executive Session Tapes	Minimum of 6 months; 6 yrs if the executive session was related to contract negotiations, nonrenewal, discharge, or expulsion	Destroy	Business Manager
Joint Powers Agreements	Permanently	n/a	Business Manager
Meeting Agendas	Retain for 10 yrs after CFY	Send to state archives	Business Manager
Meeting Packets	Retain for 10 yrs after CFY	Send to state archives	Business Manager
New Board Member Training Verification	Term of office +6 yrs	Recycle	Business Manager
Oath of Office	Retain for entire term of office + 6yrs	Send to state archives	Business Manager
Petitions: Recall and Election	10 yrs from date approved	Send to state archives	Business Manager
Policies related to board operations	Retain for life of policy plus 6 yrs once amended or rescinded	Recycle	Business Manager
Poll books	10 yrs from date of election	Send to state archives	Business Manager

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Description of Record	Retention Deadline	Destruction Method	Record Administrator
Poll tallies	10 yrs from date of election	Send to state archives	Business Manager
Statement of Interest (SFN 10172)	10 yrs after CFY	Recycle	Business Managerr
Travel Reimbursement Log/Reports	CFY +4 yrs	Shred	Business Manager

HR RECORDS RETENTION SCHEDULE

Description of Record	Retention Deadline	Destruction Method	Record Administrator
1099s	13 yrs after CFY	Shred	Business Manager
403 B Annuity Billings/ Payment Confirmation	5 yrs after separation	Shred	Business Manager
941 Federal Tax Form/EFTPS	5 yrs after separation of all employees on report	Shred	Business Manager
Absence Log	5 yrs after separation	Shred	Business Manager
Academic Records/ Transcripts	Until updated; destroy upon separation	Shred	Business Manager or HR Director
Annual Payroll Report (for Annual Financial Report)	5 yrs from date created	n/a	Business Manager
Awards/Honors records	6 yrs after separation	Shred	Business Manager
Benefits Bills (e.g., BCBS bill, AFLAC bill)	6 yrs after plan yr	Shred	Business Manager
Certificate of Fitness for Duty (Bus Drivers)	Until new certificate is received; upon separation retain final certificate for 6 yrs	Shred	HR Director, Facilities Manager, or Business Manager
Certificates of Insurance	6 yrs after final action	Shred	Business Manager
Check Register	6 yrs after created	n/a	Business Manager
Child Support Enforcement Reporting	5 yrs after separation	Shred	Business Manager
Classroom Observation Notes	2 school yrs; if used for purposes of nonrenewal, retain 6 yrs after separation	Recycle	Employee's supervisor (principal or supt.)

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Description of Record	Retention Deadline	Destruction Method	Record Administrator
COBRA Forms	6 yrs after final action	Shred	Business Manager
COBRA payments	6 yrs after final action	Shred	Business Manager
Cover Letters	6 yrs after hiring decision	Recycle or shred (if contains ss#)	HR Director or Business Manager
Credit Checks	2 yrs after selection process	Shred	Superintendent
Criminal History Records	6 yrs after hiring decision (if not hired); 6 yrs after separation if hired	Shred	Record Adjudicator
Deductions Register (by Deduction and by Employee)	5 yrs after separation	Shred	Business Manager
Direct Deposit Information and Authorization Forms	Duration of employment or until new authorization forms are provided	Shred	Business Manager
Direct Deposit Register	CFY +4 yrs	Shred	Business Manager
Driver's License Copy	1 yr after date of termination	Shred	Business Manager
Driving Record Check	Until updated or 6 yrs	Shred	Business Manager
Drug Testing	7 yrs after separation	Shred	HR Director or building administrator
Early Retirement Agreement	6 yrs after final payment made under agreement	Shred	Business Manager
Employee Contact Information Form	Duration of recall rights (for RIF'd teacher); 1 yr after updated or separation	Shred	HR Director or Business Manager
Employee Lifetime Wages Report	6 yrs after separation	n/a	Business Manager
Employee Work Agreement	6 yrs after separation	Shred	HR Director or Superintendent
Employment Contracts	6 yrs after separation	Shred	Business Manager
Employment History Records (dates of employment, pay changes, dates of actions taken such as transfers, promotions, disciplinary measures)	50 yrs after separation	Shred	HR Director or Business Manager
Evaluations	6 yrs after separation	n/a	HR Director or Business Manager
Exit Checklist	6 yrs after separation	Shred	HR Director
Exit Interview Form	6 yrs after separation	Shred	HR Director

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Description of Record	Retention Deadline	Destruction Method	Record Administrator
Flex Benefit/125/ Cafeteria Plan Application Form	5 yrs after separation	Shred	Business Manager
Flex Benefit/125/ Cafeteria Plan Billings	6 yrs after plan's termination	Shred	Business Manager
FMLA Forms	5 yrs after separation	Shred	Business Manager or HR Director
Garnishments	5 yrs after separation	Shred	Business Manager
Handbook Receipt Verification	6 yrs after separation	Recycle	Business Manager or HR Director
I-9	4 yrs after CFY or 3 yrs after separation (whichever is longer)	Shred	Business Manager
Improvement Plans	6 yrs after separation	Shred	HR Director
Insurance Applications (Medical, Vision, Aflac, Dental, Etc.)	5 yrs after separation	Shred	HR Director or Business Manager
Insurance Monthly Statements	6 yrs from date paid	Shred	HR Director or Business Manager
Interview Notes	6 yrs after hiring decision	Shred	HR Director
Interview Questions	6 yrs after hiring decision	Recycle	HR Director
Job Advertisement	6 yrs after hiring decision	Recycle	HR Director, Superintendent, or Business Manager
Job Application	6 yrs after hiring decision	Shred	HR Director or Business Manager
Job Description	6 yrs after separation	Recycle	HR Director
Job Service New Hire Report	1 yr after submission	Shred	HR Director/ Business Manager
Leave Balance Reports	3 yrs from date of creation	Shred	Business Manager or HR Director
Leave Request Forms (other than FMLA) (includes sick bank)	5 yrs after separation	Shred	Business Manager
Letter of Resignation	6 yrs after separation	Shred	Superintendent Secretary
Medical Records	6 yrs after separation	Shred	Hr. Director or Business Manager

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Description of Record	Retention Deadline	Destruction Method	Record Administrator
Medical Release to Return to Work	6 yrs after separation	Shred	HR Director or Business Manager
Negotiated Agreements (including Salary Schedules)	6 yrs after separation of last employee covered by the agreement (e.g., last teacher hired in 1980 retires in 2015; retain 1980 negotiated agreement until 2021)	Recycle	Business Manager
Nonrenewal Notices	6 yrs after separation	Recycle	Business Manager or HR Director
Offer of Employment Letter	6 yrs after separation	Shred	Business Manager or HR Director
Orientation Checklist	6 yrs after separation	Recycle	HR Director, Business Manager, or Principal
Pay Period Entries for Taxable Reimbursement	5 yrs from date created	Shred	Business Manager
Payout of Remaining Leave upon Separation	5 yrs after separation	Recycle	Business Manager
Payroll Register Totals	5 yrs after created	n/a	Business Manager
Payroll Registers	5 yrs after all employees listed have separated employment	n/a	Business Manager
Payroll Schedules	5 yrs after separation of last employee covered by the schedule (e.g., last employee hired in 1980 retires in 2015; retain 1980 payroll schedule until 2020)	n/a	Business Manager
PERS Defined Benefit Retirement Membership Application (SFN 2561)	1 year after separation	Contact PERS to ensure info is on file, then shred	Business Manager
PERS Designation of Beneficiary for Group Retirement Plan (SFN 25060)	1 year after separation	Contact PERS to ensure info is on file, then shred	HR Director
PERS Monthly Report of Contributions	1 year after separation	Shred	Business Manager
Physical Exam Records	Until updated or 6 yrs after separation	Shred	HR Director

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Description of Record	Retention Deadline	Destruction Method	Record Administrator
Policies Governing Personnel	6 yrs after separation of last employee covered by the policy (e.g., last employee hired in 1980 retires in 2015; retain 1980 policies until 2021)	Recycle	Superintendent
Pre-Observation Teacher Form	2 school yrs; if used for purposes of nonrenewal, retain 6 yrs after separation	Shred	Principal or supervisor
Reference Check Information/ Notes (e.g., Verification of Employment)	6 yrs after decision to hire	Shred	Business Manager
Reference Letters/Checks	6 yrs after decision to hire	Shred	Business Manager
Rejection Letter (Employment)	6 yrs after issuing	Recycle	HR Director, Business Manager, or Superintendent
Resumes	6 yrs after decision to hire	Shred	HR Director, Business Manager or Superintendent
Social Security Card (copy)	1 year after separation	Shred	Business Manager
Social Security Verification	6 yrs after separation	Shred	Business Manager
State Income Tax Quarterly Reports	13 yrs after CFY	Shred	Recycle
Tax Deduction Register	13 yrs after CFY	Shred	Shred
Teacher License (Copy)	Until updated and 1 yr after separation	Shred	Business Manager or HR Director
TFFR Member Action Form (SFN 5098)	1 year after separation	Contact TFFR to ensure info is on file, then shred	Business Manager
TFFR Member Certification (SFN 11732)	1 year after CFY	Shred	Business Manager
TFFR Monthly Report of Contributions	5 yrs after created	Contact TFFR to ensure info is on file, then shred	Business Manager
TFFR Notice of Termination (SFN 17144)	5 yrs after separation	Contact TFFR to ensure info is on file, then shred	Business Manager
TFFR Salary Verification— Pending Retiree (SFN 59158)	1 yr after separation	Contact TFFR to ensure info is on file, then shred	Business Manager

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Description of Record	Retention Deadline	Destruction Method	Record Administrator
Timecard Reports	5 yrs after created	Shred	Business Manager
Timecards	6 yrs after separation	Recycle	Business Manager or HR Director
Training Records	6 yrs after separation	Shred	HR Director or Business Manager
Travel Reimbursement Log/Reports	CFY +4 yrs	Shred	Business Manager
U.S. Department of Labor Monthly Report	1 yr after created	Shred	Business Manager
Unemployment Quarterly Reports	5 yrs from date created	Shred	Business Manager
Union Dues List	5 yrs from date created	Shred if contains confidential info; otherwise recycle	Business Manager
Verification of Professional Development	6 yrs after separation	Shred	Superintendent
Verification of Wages to Employees	6 yrs after separation	Shred	Business Manager
Voluntary Salary Deduction/Reduction Agreements	5 yrs after separation	Shred	Business Manager
W-2 Forms	13 yrs after CFY	Shred	Business Manager
W-4 Forms	13 yrs after CFY	Shred	Business Manager
W-9 forms	13 yrs after CFY	Shred	Business Manager
Wage and Batch Totals Listing Deductions	CFY +4 yrs	Shred	Business Manager
Waiver of Insurance	5 yrs after separation	Shred	Business Manager
Warnings/Write Ups	6 yrs after separation	Shred	HR Director or employee's supervisor
WSI Annual Report	CFY +2 yrs	Shred	Business Manager
WSI Claims	4 yrs after final action	Shred	Business Manager

New Town Public School District #1

Exhibit Approved: 3/8/2016

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