

Records Management Plan

Responsible Department	Records Coordinator	Document Type	Record Format	Live Data or Paper Files	Disposal Code	Backup Data	Disposal Code	
Office of Technology	Director of Technology	Equipment Inventory						
		Active Assets	C	Active until retired		2 months		
		Helpdesk and Asset Inventory	C	Permanent	4	2 months	5	
Office of Technology	Director of Technology	Student Information Systems						
		Registration/Demographic	C	5 years after student reaches age 21	4	2 months	5	
		Programs	C	5 years after student reaches age 21	4	2 months	5	
		Scheduling (Building History (Setup), Master Schedule, Student, Schedules, Student Requests)	C	5 years after student reaches age 21	4	2 months	5	
		Attendance (Building History (Setup), Attendance Detail, Notifications, Day Totals, Interval Totals)	C	5 years after student reaches age 21	4	2 months	5	
		Mark Reporting (Building History (Setup), MR Data, IPR Data, Gradebook Assessment and Scores)	C	5 years after student reaches age 21	4	2 months	5	
		Discipline (Building History (Setup), Incidents, Discipline Letters)	C	5 years after student reaches age 21	4	2 months	5	
		Medical (Medical Information, Medical Letters)	C	5 years after student reaches age 21	4	2 months	5	
		Student Success Plans	C	5 years after student reaches age 21	4	2 months	5	
		Fees (Fee Groups, Items and Textbooks, Student Fees and Payments)	C	5 years after student reaches age 21	4	2 months	5	
		Test Scores	C	5 years after student reaches age 21	4	2 months	5	
	Director of Special Education and Student Services	IEPplus- Student data						
		IEP	C	25 years	4	2 months	5	
		NOREP	C	25 years	4	2 months	5	
		Permission Letters	C	25 years	4	2 months	5	
		504 Plans	C	25 years	4	2 months	5	
		Schoolology	C	15 years	4	2 months	5	
		Performance Plus	C	15 years	4	2 months	5	
		Historical Student Data						
		Duplicate Student Records - SIS	C	5 years after deletion from SIS	4	2 months	5	
		PIMS State Reports (ACS and Corresponding Documentation)	C	10 years from year submitted	4	2 months	5	
		PASecureID Modification Forms (ID Merge in PIMS)	C	5 years from year submitted	4	2 months	5	
				Email				
Active accounts	C			18 months	4	2 months	5	
Archived	C			2 years from date created	4	2 months	5	
Litigation Hold	C			Term of Hold	4			
Calendar	C							
File Folders-Network Home Directories (Personal Files)								

Office of Technology	Director of Technology	Active Staff	C	While Active	4	4 months	5	
		Terminated Staff	C	6 months	4	2 months	5	
		Audio Files <i>(Not available to be restored)(P, T, School Drives,Public)</i>	C,D	1 year	4	2 months	5	
		Picture Files <i>(Not available to be restored)</i>	C,F	1 year	4	2 months	5	
		Video Files <i>(Not available to be restored)</i>	C,D	1 year	4	2 months	5	
		Staff Account/Access Form (SAAF)						
		SAAF Form	A, C	6 years after	4	2 months	5	
		Documentation supporting Litigation Hold Requests	C	Term of Hold	4			

Records Management Plan

Responsible Department	Records Coordinator	Document Type	Record Format	Live Data or Paper Files	Disposal Code	Backup Data	Disposal Code
Office of Technology	Director of Technology	Internet Usage Logs	C	2 months	4	2 months	5
		Phone Logs (Landlines)	C	2 months	4	2 months	5
		Voicemail - Landline					
		Voicemail and Text Messaging (Cell Phones)		Controlled by Carrier			
Office of Technology	Food Services	Federal School Lunch Records	C	1 year (previous 3 years archived on SDL)		2 months	
	Transportation	Transportation Software Records	C	4 years	1,5	2 months	
Office of Technology	SIS Coordinator Senior Programmer	Content 360					
		Workflow Processes - Transfer and Continuation Request	C	50 years after graduation	4	2 months	5
		Electronic Student Records (all Content Types)	C	50 years after graduation	4	2 months	5
Office of Technology and Business		Inventories	A	6 years	2		
Offices of Technology and Student Services	Supervisor of Data and Curriculum	Student Records - Category A: official administrative data (e.g. identifying data, birth date, academic work completed, level of achievement and attendance data.	A, C	Permanent	N/A		
		Student Records - Category B: scores on standardized intelligence and aptitude tests, interests inventory test results, health data, family background information, systematically gathered teacher or counselor ratings and observations, and verified report of serious or recurrent behavior patterns	A,C	Periodic Review	2		
		Student Records - Category C: legal and clinical findings, including certain personality test results, and unevaluated reports of teachers, counselors and others which may be needed in ongoing investigations and disciplinary or counseling actions	A	Annual Review	2		
		Student Records - Attendance Excuse Notes (Building Level)	A	1 year	2		
Office of Teaching and Learning	Coordinator of Professional Development	Act 48 Hours	C	10 years	4	3 months	5
		Induction Certificate	C	10 years	4	3 months	5
Business Office	Business Manager	Accident reports and claims (settled)	A	6 years	2		

		Accounts payable ledgers, Invoices	A	6 years	2		
		Accounts receivable ledgers	A	6 years	2		
		Annexation, Consolidation and Boundary Change Records	A	Permanent	N/A		
		Annual financial report	A	6 years	2		
		Audit reports	A	Permanent	N/A		
		Bank deposit slips	A	6 years	2		
		Bank reconciliations	A	6 years	2		
		Bylaws, Regulations and Rules of Order	A	6 years after superseded or revoked	2		
		Certificates of Election	A	6 years	2		
		Check (cancelled)	A	6 years	2		
		Contracts (Includes Advertisements, Instructions to Bidders, Performance and Payment Bonds, Requests for Proposals)	A	If accepted - Retain 6 years after termination of general written contracts. Retain 12 years after termination of construction contracts.	2		
		Contracts & leases (expired)	A	6 years	2		
		Contracts & leases in effect	A	Permanent	N/A		
		Correspondence (general)	A	3 years	2		

Records Management Plan (Revised March 2018)

Responsible Department	Records Coordinator	Document Type	Record Format	Live Data or Paper Files	Disposal Code	Backup Data	Disposal Code
Business Office	Business Manager	Deeds and Related Land Records	A	Permanent	N/A		
		Compliance Reports and Related Records	A	3 years			
		Grant Applications, grantor and grantee correspondence and official responses, grant contracts, fiscal records, reports, administrative correspondence, grant products, and related records.	A	8 years after completion of grant award. 1 year after denial for unsuccessful applications.	2		
		Insurance Claims and Policies	A	6 years after final settlement. 6 years after expiration, provided all claims have been	2		
		Minute books	A	Permanent	N/A		
		Payroll records	A	3 years	2		
		Property and Equipment Inventories	A	6 years after superseded or obsolete	2		
		Fixed Assets Inventories	A	Permanent	N/A		
		Purchase Orders	A, C	6 years	2, 4		
		Stock and Bond certificate	A	6 years	2		
		Trademark registrations (including specimens and evidence of first	A	Permanent	N/A		
Human Resources	Director of Human	Employee Health Insurance Claim Files	A	Retain 6 years after settlement of claim	2		

Resources	Employee Medical Records	A	Retain same length of time as Individual Employee Personnel Records. However, if employee has been exposed to toxic substances or harmful physical agents in the work place, retain at least 30 years after termination of employment and comply with appropriate Occupational Safety and Health Standards issued by the U.S. Department of	2		
	Employee Personnel Records (Includes Applications for Employment, Commendations, Correspondence, Health Insurance Membership Applications, Letters of Resignation, Life Insurance Applications, Performance Evaluations, Personnel Change Forms, Personnel History Card, Photo Identification Records, References, Resume, Retirement Membership Applications, Salary Review Forms, Separation Report, Training Records, and Vacation and Sick Leave Reports)	A, C	Retain 6 years after termination of employment. (If applicable, comply with union rules relating to certain types of personnel records such as evaluations and reprimands.)	2, 4		
	Ethics Commission Statements of Financial Interest	A, C	6 years	2		
	Office Discrimination Complaint Case Files	A	4 years after resolution of case	2		
	Job Announcements	A, C	Retain 2 years after position has been filled.	2, 4		
	Job Descriptions	A,C	Retain current plus one prior revision	2		
	Labor Negotiations Files	A,C	Retain 6 years after expiration of contract	2		
	Case Files (Solicitor)	A, C	Retain closed cases as long as required by solicitor	2		
	Opinions (Solicitor)	A	Permanent	N/A		
	Union Grievances	A	Retain 3 years after final resolution	2		
	Worker's Compensation Records	A	Retain 4 years after the signing of final settlement receipt, or 4 years after death of	2		

Records Management Plan (Revised March 2018)

Responsible Department	Records Coordinator	Document Type	Record Format	Live Data or Paper Files	Disposal Code	Backup Data	Disposal Code
Office of Facilities	Director of Facilities and Operations	Hazardous Substance Survey Forms	A	30 years. If used as health and exposure record for employee involved in a specific incident, retain 30 years after termination of	2		
		Material Safety Data Sheets	A	30 years. If used as health and exposure record for employee involved in a specific incident, retain 30 years after termination of	2		
		Asbestos Records and Samples	A	Permanent			
School Board	School Board Secretary	Open Board Meeting Minutes	A	Permanent			
Record Formats:		Disposal Codes:					

A. Paper	1. Routine Handling - No special precautions are necessary upon disposal. The records should be recycled or disposed of in accordance with standard district procedures.
B. Microform	2. Special Handling - The destruction of records containing privileged, confidential, exempt or sensitive information that requires special handling by shredding, erasing, or any other method that reduces information to an illegible condition.
C. Electronic (machine readable)	3. Archival Retention - Records requiring permanent retention or records that have sufficient archival or historic value must be preserved in perpetuity.
D. Audiovisual (tapes, movies, film strips, etc.)	4. Purge - For use with electronic records (live data). When electronic records have met their retention period, they will be purged.
E. Cartographic (maps, drawings, blue prints, plans, etc.)	5. Delete - For use with electronic records (purged/backup). When electronic records have met their retention period, they will be deleted.
F. Photographic	