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| Section | 8000 Operations |
| Title | PUBLIC RECORDS |
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8310A - **PUBLIC RECORDS**

The School District's public records are available for public inspection and/or copying in accordance with State law.

Designation of Officers

The Superintendent shall be the District Records Officer (DRO).

Definitions

"Public record" includes any document, device, or item, regardless of physical form or characteristic, including an electronic record, created or received by or coming under the jurisdiction of the Board or its employees, which serves to document the organization, functions, policies, decisions, procedures, operations, or other activities of the District.

"Public record" does not mean any of the following: medical records; trial preparation records; confidential law enforcement investigatory records; and other records the release of which is prohibited by State or Federal law, including, but not limited to, student personally identifiable information and student directory information when the student's parents have affirmatively withdrawn consent for release of it in writing.

"Electronic record" includes any record having been created, generated, sent, communicated, received, or stored by electronic means.

"Redaction" means obscuring or deleting any information that is exempt from public inspection or copying from an item that otherwise meets the definition of a "public record."

Location and Time

Public records are to be available for inspection during regular business hours, with the exception of published holidays. The District shall organize and maintain public records in a manner such that they are promptly made available for inspection or copying. "Prompt" and "reasonable" take into account the volume of records requested, the proximity of the location where the records are stored, and the necessity for any legal review of the records requested. No record shall be removed from such location. A member of the staff must be present throughout the inspection and copying of such record.

While requests to inspect and/or obtain copies of records are best made in person, telephone and written requests are permitted.

While the District is responsible for promptly preparing and making available public records, State law does not require the District to provide additional information that may be related to a record but is not part of a record. In addition, the District is not required to create a new record to respond to a public request for information if no public record is available that is

responsive to the request or to respond to requests for information when the information requested is not contained in a public record.

While personnel files contain public records, some specific information and/or records contained in such files may be confidential and not subject to disclosure (see AG 8320).

Procedures

The following procedures shall be followed in connection with requests to inspect and secure copies of School District's public records:

- A. Requests to inspect and/or obtain copies of public records shall be submitted to the Superintendent. A public records request must at least identify the records requested with sufficient clarity to allow the District to identify, retrieve, and review the records. If it is not clear what records are being sought, the DRO shall contact the requester for clarification.
- B. Individuals requesting to inspect and/or obtain copies of public records do not have to put records requests in writing and do not have to provide his/her identity or the intended use of the requested public record(s).

Each request shall be evaluated for an estimated length of time required to gather the records. Routine request for records should be satisfied immediately if feasible to do so. Routine requests include, but are not limited to, meeting minutes (both draft and final form), budgets, salary information, forms and applications, personnel roster, etc. If fewer than twenty (20) pages of copy are requested or if the records are readily available in an electronic format that can be e-mailed or downloaded easily, these should be made as quickly as equipment allows.

All requests for public records must either be satisfied (as above) or be acknowledged in writing by the DRO promptly following the District's receipt of the request. If the request for records was in writing, the acknowledgement shall also be in writing.

If a request is deemed significantly beyond "routine" (such as seeking a large volume/number of copies or requiring extensive research), the acknowledgement must include the following:

- A. an estimated number of business days necessary to satisfy the request
- B. an estimated cost if copies are requested
- C. any items within the request that may be exempt from disclosure and the reason for such exemption, including legal authority

With respect to public records that are determined to be available, the Superintendent will direct the requester to the place where the requested records may be inspected and will arrange for the preparation and certification of copies upon tender of any required fee.

Any denial of public records requested must include an explanation, including legal authority. If portions of a record are public and portions are exempt, the exempt portions are to be redacted and the rest released. If there are redactions, each redaction must be accompanied by a supporting explanation, including legal authority.

With respect to records that are determined not to be available, the Superintendent will notify the requester of same, noting the reason for unavailability on the request form if one is submitted, and return one (1) copy of the form to the requestor. The Superintendent shall also notify the requester of the estimated time necessary to process and fulfill the request, make arrangements with the requester for delivery of the requested records, and arrange a method of communication between the requester and the School District in the event that further information is needed by the District to fulfill the request.

Fees

Upon request, copies of public records will be provided at the actual cost of making copies:

- A. The charge for paper copies is \$.10 per page.
- B. The charge for downloaded computer files to a compact disc is \$5.00 per disc.
- C. There is no charge for documents e-mailed.

A person who requests a copy of a public record may choose to have that record sent to him/her by United States mail or by other means of delivery or transmission provided the person making the request pays in advance for said record as well as the

costs for postage and mailing supplies.

Electronic Mail

Documents in electronic mail format are records as defined by the Ohio Revised Code when their content relates to the business of the District (i.e., they serve to document the organization, functions, policies, decisions, procedures, operations, or other activities of the District). E-mail shall be treated in the same fashion as records in other formats and shall follow the same retention schedule.

Records in private e-mail accounts are subject to disclosure if their content relates to public business, and all employees or representatives of the District are responsible for retaining e-mails that meet the definition of public records and copying them to their District e-mail account(s) and/or to the records custodian.

The records custodian shall treat such e-mail/records from private accounts as records of the District. These records shall be filed appropriately, retained in accordance with the established schedules, and made available for inspection and copying in accordance with the Public Records Act.

Private e-mail, electronic documents, and documents ("private records") that do not serve to document the District's organization, functions, policies, decisions, procedures, operations or other activities are not public records. Although private records do not fall under Policy 8310 – "Public Records" or this guideline, they may fall under Policy 8315 – "Information Management" or AG 8315 – "Litigation Hold Procedure."

RETENTION OF RECORDS

The District Records Commission is responsible for completing an "Application for One-time Disposal of Obsolete Records" Form RC-1, and for developing the District's "Schedule of Records Retention and Disposition" – Form RC-2. Both forms must be submitted to and approved by the Ohio History Connection and the State Auditor. Subsequent revisions to the RC-2 Form must also be approved using this same process. Only in conformance with the approved "Application for One-time Disposal of Obsolete Records – Form RC-1" or the "Schedule of Records Retention and Disposition - Form RC-2" may the District's Records Commission review applications for the disposal of obsolete records. The District Records Commission will utilize the "Certificate of Disposal Form" RC-3 when required as indicated by the Ohio History Connection on the approved RC-2 form.

To facilitate the development, updating and/or revision of the Schedule of Records Retention and Disposition, and in reviewing requests for disposal of obsolete records, the District Records Commission shall utilize the following guidelines recommended by the State Auditor's office.

SCHEDULE OF RECORDS RETENTION AND DISPOSITION

| Record Title and Description | Retention Period |
|--|---------------------------------------|
| BOARD RECORDS | |
| Minutes | Permanent |
| Audio Tapes | 2 Years |
| Blue Prints, Plans, Maps | Permanent |
| Deeds, Easements, Leases | Permanent |
| Board Policy Books and Other Adopted Policies | 1 Year After Superseded |
| Administrative Regulations | 1 Year After Superseded |
| Court Decisions | Permanent |
| Claims and Litigation | Permanent |
| Elections | 10 Years |
| Record Disposal Forms (RC-3) | 10 Years |
| Bargaining Agreements | 10 Years After Expiration |
| Budget Policy Files | 5 Years |
| Worker's Compensation Claims | 10 Years After Financial Payment Made |
| Bank Depository Agreements | 4 Years After Completion |
| Record Title and Description | Retention Period |
| BOARD RECORDS (cont'd) | |
| Organization Reports | 2 Years** |
| Board Meeting Notes | 1 Year |
| Agendas | 1 Calendar Year ** |
| Adopted Courses of Study | Until Superseded |
| Adopted Special Education Programs | Until Superseded |
| Adopted Special Programs | Until Superseded |
| Employees Files | |
| (Employment Applications, Resumes, Contracts/Salary Notices, Evaluations, Personnel Actions, | |

| | |
|---|--|
| Absence Certification, Transcripts And Any Other Documents Which, Become Part of the File.) | |
| Certified Active Employees | Permanent |
| Classified Active Employees | Permanent |
| Certificated Inactive Employees | Permanent*** |
| Record Title and Description | Retention Period |
| BOARD RECORDS (cont'd) | |
| Classified Inactive Employees | Permanent*** |
| Civil Rights, Civil Services, and Disciplinary Reports | Permanent*** |
| Retirement Letters | Permanent*** |
| Substitute Records | 25 Years |
| Employee Contracts | 4 Years After Termination From Employment |
| Professional Conference Applications | 2 Years ** |
| Irregular Employee Contracts (Substitutes, etc.) | 4 Years After Contract Expires |
| Unemployment Claims | 5 Years |
| Unemployment | 5 Years |
| Applications (Not Hired) | 2 Years** |
| Schedules of Employees | Fiscal Year Plus 2 years |
| Student Helper Applications | 2 Years |
| Teacher Personnel Reports (Internal) | Fiscal Year Plus 1 Year |
| I-9 Immigration Verification Forms | Termination of Employment Plus 1 Year |
| Job Description | Retain until superceded or obsolete |
| Record Title and Description | Retention Period |
| STUDENT RECORDS | |
| Student Record Folders | Permanent*** |
| Enrollment/Withdrawal Information | |
| Grades/Transcripts | |
| Activities Record | |
| Attendance Records | |
| Individual Test Results | |
| Standardized | |
| Competency/Proficiency | |
| Aptitude | |
| Intervention Records | |
| Foreign Exchange Records | |
| Suspension/Expulsions | |
| Home Schooled Student Records | |
| Office Record Card (K-9) | Permanent*** |
| Cosmetology Records (Vocational) | Permanent*** |
| Health/Medical Records | 7 Years After Graduation |
| Visual Screening | |
| Hearing Screening | |
| Immunization Records | |
| Discipline Records | 1 Year After Student Leaves School |
| Letters to Parents | |
| Office Discipline | |
| Psychological Records (Restricted) | Permanent*** |
| Child Abuse/Neglect | Through Graduation |
| Referral Letters | |
| Teacher Grade Books/Records | 3 Years** |
| Record Title and Description | Retention Period |
| STUDENT RECORDS (Cont'd) | |
| Pre-School Screening Profiles | 3 Years |
| Age And Schooling Records (Work Permits) | 3 Years |
| Accident Reports | 5 Years Provided No Action Pending |
| Individual Education Plan (IEP) | Permanent |
| Free/Reduced Price Lunch Application | 4 Years |
| Emergency Information | Until Supersceded |
| Court orders on guardianship or parental rights/responsibilities | Until Supersceded |

BUILDING RECORDS

| | |
|--------------------------------|------------------|
| Tornado and Fire Drill Records | 1 Year* |
| Building Health Inspections | 2 Years* |
| Student Activity Records | 2 Years** |
| Pay-In Forms | |
| Pay-Out Forms | |
| Account Forms/District | |
| Budget Forms | |
| Requisitions | |
| Purchase Orders | |
| Ticket Sale Reports | |
| Receipts/Deposits Slips | 4 Years** |
| Budget/Appropriation Records | 4 Years** |
| Requisitions/Purchase Orders | 10 Years** |
| Textbook Inventories | Until Superseded |
| Supplies Inventory | Until Superseded |
| Student Handbooks | Until Superseded |
| Record Title and Description | Retention Period |

ADMINISTRATIVE RECORDS

| | |
|---|---------------------------------------|
| School Calendars | 5 Years |
| Repair, Installation, and Maintenance Records | 4 Years** |
| Prevailing Wage Records | 4 Years** |
| Rental Information (Use of Facilities) | 4 Years** |
| Work Orders | 4 Years** |
| Environmental Reports And Data (asbestos, etc.) | 4 Years** |
| Vandalism Reports | 4 Years** |
| Student Activity Purpose Clauses | 4 Years** |
| Sales Potential Forms (Student Activities) | 4 Years** |
| Bids and Specifications (Unsuccessful) | 1 Year** |
| Bids and Specifications (Successful) | 4 Years After Completion of Project** |

Record Title and Description

ADMINISTRATIVE RECORDS (cont'd)

| | |
|---|--|
| Contractor Files (Resolutions, Additions, Drawings, etc.) | Retention Period |
| Preventive Maintenance Reports | Until Project Complete, if No Action Pending** |
| Warranty/Guarantee | Fiscal Year Plus 2 Year |
| Plant and Equipment Inventory | Life/Warrant of Equipment |
| Textbook/Workbook Inventory | Until Superseded** |
| Supplies Inventory | Until Superseded** |
| Record Title and Description | Until Superseded** |
| | Retention Period |

SPECIAL EDUCATION RECORDS

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|------------------------------------|--------------|
| Special Education Tutoring Reports | 10 Years |
| Individual Educational Plan (IEP) | Permanent |
| Psychological Records (Restricted) | Permanent*** |

TRANSPORTATION RECORDS

| | |
|---|------------------------------------|
| Driver Physical | 2 Years After Termination |
| Fuel Consumption Data | 4 Years** |
| Transportation Records | 4 Years** |
| Field Trip Forms and Volunteer Driver Forms | Fiscal Year Plus 2 Years |
| Accident Reports | 3 Years Provided No Action Pending |
| Vehicle Registration | Life of Vehicle |
| Vehicle License | 1 Year After Termination |
| Driver Certifications | 1 Year After Termination |
| Record Title and Description | Retention Period |

TRANSPORTATION RECORDS (cont'd)

| | |
|-----------------------|--------------------|
| Supplies Inventory | Until Superseded** |
| Vehicle Defect Report | Life of Vehicle |

FOOD SERVICE RECORDS

| | |
|----------------------|-----------|
| Food Service Records | 4 Years** |
| Menus | |
| Food Production | |
| Milk Sold | |
| Students Served | |

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|---|--|
| Lunchroom Records | 4 Years** |
| Cash Register Tapes | |
| Cashier's Daily Reports | |
| Lunchroom Reports (Free and Reduced) | 4 Years** |
| Inventories | Until Superseded** |
| Lunchroom License | 1 Year After Expiration |
| Record Title and Description | Retention Period |
| FINANCIAL RECORDS | |
| Annual Financial Reports | 5 Years** |
| Appropriation Ledgers | |
| Budget Ledgers | |
| Revenue Ledgers | |
| Vendor Listing | |
| Check Register | |
| Purchase Order Listing | |
| Invoice List | |
| Account Reports | |
| Financial Summary | |
| Detail Reports | |
| Activity Fund Cash Journal and Ledger | 5 Years** |
| Bond Register | 20 Years After Issue Expires |
| Securities | Permanent*** |
| Investment Ledger | 5 Years** |
| Foundation Distribution | 5 Years** |
| Tax Settlements (Semi-Annual) and Advances | 5 Years** |
| Budgets (Annual) | 5 Years** |
| Insurance Policies | 15 Years After Expiration Provided All Claims Settled |
| Record Title and Description | Retention Period |
| FINANCIAL RECORDS (cont'd) | |
| Contracts | 15 Years After Expiration |
| Bonds and Coupons | Until Redeemed** |
| Accounts Payable Ledgers | 5 Years** |
| Account Receivable Ledgers | 5 Years** |
| Budget Work Papers | 5 Years** |
| Vouchers, Invoices and Purchase Orders | 10 Years** |
| State Program Files | 10 Years ** |
| Aux. Services, DPPF, Adult Vocational Excess Lottery, Data Processing, Public/Private Grants, etc. | |
| Federal Program Files | 10 Years** |
| Title I, II, III, IV-B IV-C, & VI-B; Chapter 1, 2; Drug Free, etc. | |
| Travel Expenses Vouchers | 10 Years** |
| Tax Anticipation Notes (Records Borrowing Against Future Tax Collections) | 10 Years** |
| Record Title and Description | Retention Period |
| FINANCIAL RECORDS (cont'd) | |
| State Reimbursement Settlement Sheets | 5 Years** |
| Unemployment Claims | 5 Years |
| Employee Bonds, Board Member Bonds | 5 Years |
| Certificate of Estimated Resources | 15 Years After Expiration |
| Appropriation Resolutions | 5 Years |
| Tax Appointments (Semi-annual) | 5 Years |
| Canceled Checks and Bank Settlements | 4 Years** |
| Publication Notice | 4 Years** |
| Tuition Fees and Payments | 4 Years** |
| School Finance (S.F.) Monthly Statements | 4 Years** |
| Investment Records (May Include Individual Record of Investments, Bank Confirmation, Wire Transfers, Copy of CD, etc.) | 4 Years** |
| Travel Expense Reports | 10 Years** |

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|--|---------------------------------------|
| State Sales Tax Reports | 4 Years** |
| Record Title and Description | Retention Period |
| FINANCIAL RECORDS (cont'd) | |
| Student Activity Fund (Pay-Ins, Pay-Outs, Receipts/Deposits, Reports) | 4 Years** |
| Check Registers | 4 Years** |
| Deposit Slips/Cash Proofs | 4 Years** |
| Bids and Specifications (Unsuccessful) | 1 Year** |
| Bids and Specifications (Successful) | 4 Years After Completion of Project** |
| Receipt Books | 4 Years** |
| Extra Trip Records | 4 Years** |
| Monthly Financial Reports | 4 Years** |
| Accounting Data | 4 Years** |
| Service Contracts | 4 Years** |
| State Subsidy Reports | 3 Years** |
| Application for Driver Education, Student Transportation, Special Education, etc. | |
| Delivery/Packing Slips | 1 Year** |
| Requisitions | 1 Year* |
| Record Title and Description | Retention Period |
| PAYROLL RECORDS | |
| Payroll Ledgers | Permanent*** |
| Bi-Weekly Payroll Reports, Quarterly Payroll Reports | |
| Earnings Registers | Permanent*** |
| By Staff Member | |
| By Calendar Year | |
| Monthly Payroll Reports | Permanent*** |
| Leave Usage And Accumulation, Retirement Service, etc. | |
| Bureau of Employment Service Quarterly Reports | 7 Years |
| W-2's, W-4's (Employer Copy) | 6 Years and Current** |
| Federal Income Tax Quarterly/Annual) | 6 Years and Current** |
| Ohio Income Tax (Monthly/Annual) | 6 Years and Current** |
| City Income Tax (Monthly/Annual) | 6 Years And Current** |
| School Income Tax (Monthly/Annual) | 6 Years and Current** |
| Payroll Reports | 4 Years** |
| Reports Used for | |
| Each Payroll – Computer Generated | |
| Record Title and Description | Retention Period |
| PAYROLL RECORDS (cont'd) | |
| Payroll Update Listing | 4 Years** |
| Payroll Calculations | 4 Years** |
| State Teachers System And School Employees Retirement System Waivers | Permanent*** |
| State Employees Retirement System (SERS) | 4 Years** |
| State Teachers Retirement System (STRS) Reports | 4 Years** |
| Annuity Reports | 4 Years** |
| Benefit Folders/Reports | 4 Years** |
| Employee Request and/or Authorization For Leave Forms (Sick, Vacation, Personal, or Other Leave) | 4 Years** |
| Deduction Reports | 4 Years** |
| Voluntary Payroll | |
| Deductions | |
| Employee Vacation/Sick Leave Records | 4 Years** |
| Time Sheets | 6 Years** |
| Record Title and Description | Retention Period |
| PAYROLL RECORDS (cont'd) | |
| Overtime Authorization | 6 Years |
| Employee Insurance Bills | 4 Years** |
| Medical | |
| Dental | |
| Life | |
| Paycheck Register | 4 Years** |
| Payroll Bank Statement | 4 Years** |

Deduction Authorization

Until Superseded or
Employee Terminated

REPORTS

State Audit Reports
#59, #659 and #4502
#25 and #625
School Finance (S.F.) Reports – Annual
Special Education (S.E.) Reports – Annual
Vocation Education (V.E.) Reports – Annual
Ohio Common Core Data (OCCD) Reports

5 Years
5 Years
5 Years
5 Years
7 Years
5 Years
5 Years

Record Title and Description

Retention Period

REPORTS (cont'd)

Drivers Education Reports
Ohio Department of Education (ODE) Reports
Civil Rights Reports
Title IX Reports
SM-I & SM-2 (Annual and Quarterly)
State Minimum Standards
Personnel State Reports (Currently SF-1, CS-1)
Worker's Comp Wage Reports (C. Auditor)
Bank Balance Certification (Co. Auditor)
Transportation Reports

5 Years
5 Years
Permanent***
10 Years
10 Years
10 Years
4 Years**
5 Years
5 Years
4 Years**

OTHER

Personnel Directory
Employment Record (By Grade and Building)
School Calendars

10 Years
Permanent***
5 Years

Record Title and Description

Retention Period

OTHER (cont'd)

Building, Boiler, Maintenance Reports
Employee Handbooks
Directives, Standards, Laws for Local, State and Federal Governmental Agencies
Attendance Records

2 Years*
Until Superseded
Until Superseded
Until Superseded

*After End of Fiscal Year

**Provided Audited

***Hard Copy maintained for 5 Years, Then Microfilmed

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Form RC-1, Form RC-2, Form RC-3, Ohio History Connection