



Record Retention and Destruction Policy

This Policy pertains to records and documents, regardless of physical form or characteristics, that have been created or received by Propel in connection with school business. For purposes of this Policy “records” are defined as recorded information that has been generated internally (or received from external sources) and utilized by Propel for school business, related to Propel’s legal obligations, documenting a transaction or verifying a receipt. Records can be maintained in various storage methods such as paper, audio or video recordings, electronic messages, computer hard drives, tapes, discs, microfilm and microfiche. **This policy does not apply to student records. Please refer to the Student Records Policy.**

The CEO/Superintendent will designate a person to be responsible for implementing this Policy, ensuring compliance with it, and answering questions about it. All records are the property of Propel, and no employee has any personal or property right in such records.

The Record Retention Matrix (which may be amended by the administration from time to time) attached to this Policy establishes how long records are to be kept. Records shall not be destroyed before the required retention period has expired. Additionally, records shall not be kept beyond the required retention period unless the person designated by Propel agrees that the records should be kept for a longer period.

Duplicates of original documents should be discarded after they have served their purpose unless they are necessary to support current Propel operations. Duplicates should never be retained for a period longer than the retention period for the original document.

Electronically stored information shall be retained as if it was stored as paper documents. Voice mail and other electronic data that are not records should be destroyed.

If there is notice or indication of an official investigation, complaint, charge or litigation involving Propel record destruction must be suspended immediately. Record destruction will be reinstated upon the conclusion of the investigation, complaint, charge or litigation. Employees are prohibited at any time from discarding (before the scheduled destruction time) documents that the employees believe might be harmful.

Employees are prohibited from engaging in the unauthorized destruction, removal, use, falsification or inappropriate alteration of any record.



Date Last Modified	Name	Modifications
4/6/2018	Jaclyn Hoover	Format Revision

Approved By	Date
Dr. Tina Chekan	May 21, 2018
Board of Trustees	May 21, 2018



Record Retention Matrix

TYPE OF RECORD	LOCATION	RETENTION PERIOD	DISPOSAL METHOD	PERSON RESPONSIBLE
Business Office Accounting Records				
Budgetary Accounting Records - All Funds	Business Office Storage Room	7 years	Trash	Business Manager
Accounts Payable	Business Office Storage Room	7 years	Trash	Accounting Manager
Cancelled Checks	Business Office Storage Room	7 years	Trash	Accounting Manager
Check Registers	Business Office Storage Room	7 years	Trash	Accounting Manager
Purchase Orders	Business Office Storage Room	7 years	Trash	Business Manager
Cash Receipts	Business Office Storage Room	7 years	Trash	Accounting Manager
Monthly/Quarterly Financials	Business Office Storage Room	7 years	Trash	Business Manager
General Ledger Journal Entries	Business Office Storage Room	7 years	Trash	Accounting Manager
Bank Reconciliations – Schools	Business Office Storage Room	7 years	Trash	Accounting Manager
Bank Reconciliations - Foundation & SFD	Business Office Storage Room	7 years	Trash	Accounting Manager
Annual Independent Auditor Reports	Business Office Storage Room	Permanent	N/A	Business Manager



Department of Education Annual Budget	Business Office Storage Room	Permanent	N/A	Accounting Manager
Department of Education Annual Financial Report	Business Office Storage Room	Permanent	N/A	Business Manager
Business Office Miscellaneous				

State & Federal Grant Documents	Business Office Storage Room	6 years	Trash	Accounting Manager
Property and Liability Insurance Policies	Business Office Storage Room	40 years	Trash	Business Manager
Workers' Compensation Policies	Business Office Storage Room	40 years	Trash	Business Manager
Group Insurance Policies	Business Office Storage Room	40 years	Trash	Business Manager
Bond Issue Documents	Business Office Storage Room	Permanent	N/A	Business Manager
Business Office Payroll Records				

Time Sheets	Business Office Storage Room	3 years	Shred	Accounting Manager
PSERS Retirement Quarterly Reports	Business Office Storage Room	Permanent	N/A	Accounting Manager
Federal Form 941 Employer Quarterly Reports	Business Office Storage Room	7 years	Trash	Accounting Manager
Local Occupational Tax Quarterly Reports	Business Office Storage Room	7 years	Trash	Accounting Manager



PA State Tax Quarterly Report	Business Office Storage Room	7 years	Trash	Accounting Manager
Federal W-2 Annual Wage Report	Business Office Storage Room	Permanent	N/A	Accounting Manager
Semi-Monthly Payroll Reports	Business Office Storage Room	40 years	Shred	Accounting Manager
Unemployment Compensation Notices	Business Office Storage Room	7 years	Shred	Accounting Manager
HIPAA Records	Business Office Storage Room	7 years	Shred	Accounting Manager
All school set up paper work, i.e., Articles of incorporation, EIN, Set up of PSERS, Application for State Tax exemption and 501(c)(3)	Business Office Storage Room	Permanent	N/A	Business Manager

General Records				
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Board Minutes	Business Office Storage Room	99 years	N/A	Business Manager
Act 48 Teacher's Files	Director for Curriculum & Instruction Office	5 years	Shred.	Director for Curriculum & Instruction Office
Deeds and Titles	Business Office Storage Room	99 years	Trash	Business Manager
Construction Drawings	Director of Non-Instructional Services Office	99 years	N/A	Director of Non-Instructional Services
Construction & Renovation Records	Director for Curriculum & Instruction Office	Permanent	N/A	Director of Non-Instructional Services



PM & Recurring Service Training	Director of Non-Instructional Services Office	3 years	Shred	Director of Non-Instructional Services
Maintenance Requests	Director of Non-Instructional Services Office	1 year	Trash	Director of Non-Instructional Services
AHERA Documents	Director of Non-Instructional Services Office	99 years	Trash	Director of Non-Instructional Services
Annual Building Audit	Director of Non-Instructional Services Office	4 years	Trash	Director of Non-Instructional Services
Kitchen Equipment Calibration	Food Service			Food Service Manager
Student Safety Survey Results	Director for Curriculum & Instruction Office	3 years	Trash	Director of Curriculum, Data & Assessment
Continuing Professional Development Survey Results	Director for Curriculum & Instruction Office	5 years	Trash	Director of Curriculum, Data & Assessment
Right To Know Training Records - Annual	Business Office/Storage Room	30 years	Trash	Business Manager
Food Service Inventory Control Records	Food Service	7 years	Trash	Food Service Manager
Employee Evaluations/Observations	Business Office/Storage Room	Permanent	N/A	Business Manager



Employee Salary Memos	Business Office/Storage Room	Permanent	N/A	Business Manager
Computer/Intranet User Agreements	Business Office/Storage Room	Permanent	N/A	Business Manager
Technology Work Requests	ITS Office	1 Year	Trash	Director of Technology Integration & Innovation
Equipment submittals	Director of Non-Instructional Services Office	Life of equipment	Trash	Director of Non-Instructional Services
Right to Know Training Book Receipt	Business Office/Storage Room	30 years	Trash	Business Manager