OHIO HISTORY CONNECTION

DECEMBER 9 2022

STATE AND LOCAL GOVERNMENT RECORDS

Ohio History Connection
State Archives of Ohio
Local Government Records Program
800 E. 17th Avenue
Columbus, Ohio 43211-2474

614.297.2553
localrecs@ohiohistory.org
www.ohiohistory.org/lgr

# RECORDS RETENTION SCHEDULE (RC-2)– Part 1

*See instructions before completing this form. Must be submitted with PART 2*

**Section A: Local Government Unit**

| LOUISVILLE CITY SCHOOL DISTRICT | | | |
|---|---|---|---|
| (Local Government Entity) | (Unit) | | |
| Derek L. Nottingham | DEREK L. NOTTINGHAM | TREASURER | |
| (Signature of Responsible Official) | (Name) | (Title) | (Date) |

**Section B: Records Commission**

| LOUISVILLE CITY SCHOOL DISTRICT | Records Commission | | 330-875-1666 |
|---|---|---|---|
| (Local Government Entity) | | | (Telephone Number) |
| 407 E MAIN STREET | LOUISVILLE | 44641 | STARK |
| (Address) | (City) | (Zip Code) | (County) |

To have this form returned to the Records Commission electronically, include an email address:

derek.nottingham@lepapps.org

I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, or otherwise disposed of in violation of these schedules and that no record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. This action is reflected in the minutes kept by this commission.

| Derek L. Nottingham | 12.09.2022 |
|---|---|
| Records Commission Chair Signature | Date |

**Section C: Ohio History Connection - State Archives**

| Amy Czubak Digitally signed by Amy Czubak Date: 2022.12.12 15:22:50 -05'00' | Government Records Archivist | 12/12/2022 |
|---|---|---|
| Signature | Title | Date |

**Section D: Auditor of State**

| Martin E. Meeks Digitally signed by Martin E. Meeks Date: 2022.12.21 14:47:54 -05'00' | Records Manager | |
|---|---|---|
| Signature | Title | Date |

*Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form.*

State Archvies/LGRP- RC-2 (Part 1 & 2), Revised January 2019

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| | **Board and Administrative Records** | | | | |
| 101 | Minutes – Official copy of proceedings of regular and special meetings | Permanent | Paper/ Electronic | | ☑ |
| 102 | Audio tapes/DVD's of Minutes – Recording of Board meetings | 2 years | Electronic | | ☐ |
| 103 | Board Meeting Notes – Notes taken during Open Board Meetings used to formulate the minutes | 1 year | Paper/ Electronic | | ☐ |
| 104 | Agendas – Written outlines of material to be discussed at the Board of Education meetings | 1 year year provided audited | Paper/ Electronic | Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C | ☐ |
| 105 | Board Meeting Packets – Packets prepared for board members. May include agendas, copies of reports and informational handouts. | Until minutes transcribed and approved | Paper/ Electronic | | ☐ |
| 106 | Administrative Council Notes: Notes from Administrative Council meetings held prior to Board Meeting to review Board agenda and current activity in the District | 1 year | Paper/ Electronic | | ☐ |
| 107 | Blueprints, Plans, & Maps –Provide detailed description of school facilities and property | Permanent | Paper/ Electronic | | ☑ |
| 108 | Deeds, Easements, Leases – Real estate documents of ownership, easements and leased property by district | Permanent | Paper/ Electronic | | ☑ |
| 109 | Board Policy Books and Other Adopted Policies – Governing rules adopted and maintained by Board of Education defining expectations or position on a particular matter and authorizing appropriate action to be taken to establish and maintain those expectations | Until Superseded | Paper/ Electronic | | ☐ |
| 110 | Administrative Regulations – Adoption of the school policy manual which outlines, and describes the means by which a policy should be implemented providing for the management of planning, action, and assessment or evaluation. | Until Superseded | Paper/ Electronic | | ☐ |
| 111 | Court Decisions – Court proceedings involving the District excluding claims and litigations | Permanent | Paper/ Electronic | | ☑ |
| 112 | Claims and Litigations – Court processing for which the District is being or is suing for damages | Permanent | Paper/ Electronic | | ☑ |
| 113 | Administration of Federal and Stated Categorical Grant Programs - Records relating to the administration of federal and state categorical grant-funded programs. Records may include, but are not limited to: District or school-wide notification/information distributed to parents/legal guardians/students about education opportunities and services; student information (names/eligibility lists, copies of test scores, etc.; staff information (copies of employment applications, payroll/stubs, etc.; budget, inventory of equipment, legal reports, pre-and post-test data, comparability reports, evaluations; promotion of parent/family involvement (Title 1 parent advisory councils, coordination with other school-based programs and services, etc.) | Until completion of State Auditor's examination report or retain for period required by grant or program, whichever is later | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 114 | Boundary Records - Official legal description of school district boundaries, educational service center district boundaries, or director district boundaries | Permanent | Paper/ Electronic | | ☑ |
| 115 | Grievance Files/Settlements/Arbitration -Documentation of settlements and arbitration, grievances filed by local collective bargaining groups | 10 years | Paper/ Electronic | | ☐ |
| 116 | Historical Records, Materials and Artifacts that should be retained for Commemorative Events and Displays - Records documenting events or milestones of individual schools, school districts and educational service centers, where these events are not documented in other records (such as board minutes, transcripts, etc.) Including but not limited to award lists, baccalaureate and commencement programs, cumulative class rankings, diploma order lists, final grade point summaries, honor roll lists, graduating class history files, student newspapers, yearbooks/annuals. | Permanent | Paper/ Electronic | | ☑ |
| 117 | Monthly Administrative Reports & Supporting Documentation – Reports submitted monthly by administrators and supervisors on current activity in District associated with Board Agenda | 1 year | Paper/ Electronic | | ☐ |
| 118 | Elections – Items put on the ballot (tax levy related) regarding the financial support of the District | 10 years | Paper/ Electronic | | ☐ |
| 119 | Records Retention and Disposition Forms – Records, also called RC-1, RC-2, and RC-3 forms, and other locally developed forms documenting the retention and disposition of the records of an office | 10 years | Paper/ Electronic | | ☐ |
| 120 | Bargaining Agreements – Record of Agreements between the board and recognized local associations of certified and classified staff with regard to wages, hours and other terms of employment including notes taken during the negotiation process | 10 years | Paper/ Electronic | | ☐ |
| 121 | Bargaining Notes and Related Documentation | 3 years | Paper/ Electronic | | ☐ |
| 122 | Budget Policy Files – annual budget (tax and appropriation) preparation and documentation | 5 years | Paper/ Electronic | | ☐ |
| 123 | Workers Compensation Claims – Claims filed by employees due to on the job injury | 10 years | Paper/ Electronic | | ☐ |
| 124 | Bank Depository Agreements – An agreement between a bank and the district where the bank provides a guaranteed rate of return in exchange for keeping a deposit for a fixed amount of time | 1 year | Paper/ Electronic | | ☐ |
| 125 | Organization Reports | 2 years provided audited | Paper/ Electronic | | ☐ |
| 126 | Adopted Courses of Study – A comprehensive instructional program serving the educational needs of the students of the District | Until superseded | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 127 | Adopted Special Education Program – A record of programs provided to children with disabilities identified in accordance with applicable State and Federal laws, rules and regulations. These programs satisfy the requirements of Ohio Educational Agencies Serving Children with Disabilities (Ohio's Operating Standards") | Until superseded | Paper/ Electronic | | ☐ |
| 128 | Adopted Special Programs – Record of programs made available to the students to enhance their education through a variety of appropriate co-curricular and extra-curricular activities | Until superseded | Paper/ Electronic | | ☐ |
| 129 | Photo/Media Release - External Usage - Records documenting permission for non-school entities (such as television/radio stations, newspapers, school photographers, etc.) to use student images. Student images include, but are not limited to, photos, video and audio recordings. | 6 years | Paper/ Electronic | | ☐ |
| 130 | Photo/Media Release - Denial of permission. Records documenting parent/legal guardian denial of permission for the school/district to use student images recorded during official school activities/events. Includes opting-out. | Until end of school year or until superseded | Paper/ Electronic | | ☐ |
| 131 | Photo/Media Release - School District Usage - Records documenting permission for the school/district to use student images recorded during official school activities/events, by staff or students in an official capacity (e.g. school newspaper, annual staff, etc.) Includes annual student identification/class pictures taken by school-contracted photographer. Student images include, but are not limited to, photos, video, and audio recordings. | 6 years | Paper/ Electronic | | ☐ |
| 132 | Public Record Requests – Requests for records & documentation that requests were fulfilled | 2 years | Paper/ Electronic | | ☐ |
| 133 | Organizational Memberships | Until superseded | Paper/ Electronic | | ☐ |
| 134 | Visitor Log | 1 year | Paper/ Electronic | | ☐ |
| 135 | Child Care License – Copy of Child Care license issued by ODE, required for outside school hours sites. Not required for after school at risk sites. | 3 years provided audited | Paper/ Electronic | | ☐ |
| 136 | All other board and administrative records and documentation | 2 years | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| | **Employee Records** | | | | |
| 201 | Personnel Files (Short-Term Retention)- Documentation of the history and status of the employment relationship with an individual employee (classified, certified, active, and inactive). Includes substitute teachers, coaches, and advisors. Records may include: employment applications, performance evaluations, grievances, employment verifications, accident report(s), payroll change sheets, retirement information, exit interview, disciplinary action(s), waiver(s). | 7 years after employment termination | Paper/ Electronic | | ☐ |
| 202 | Personnel Files (Long-Term Retention)- Documentation of the history and status of the status of the employment relationship with an individual employee. Includes substitute teachers, coaches, and advisors. Records include: service time, salary history, leaves balances, taxes paid, resignation or retirement letter, retirement information, and waivers | 75 years after employment termination. | Paper/ Electronic | | ☐ |
| 203 | Employee Discipline Records – Records of a series of disciplinary actions leading to improvement of performance or termination from employment | 7 years after termination of employment or case closed, whichever is later, or in accordance with collective contract | Paper/ Electronic | | ☐ |
| 204 | Comp Time Cards – Accumulated and used comp time cards | Current fiscal year | Paper/ Electronic | | ☐ |
| 205 | Drug Test Records – Includes random pool eligibility lists of employees eligible to have random drug screen and drug screening results | 4 years | Paper/ Electronic | | ☐ |
| 206 | Teacher Lesson Plan Books | End of current school year or until superseded | Paper/ Electronic | | ☐ |
| 207 | Employee Contracts – Written agreement between the District and the employee | 4 years | Paper/ Electronic | | ☐ |
| 208 | Professional Conference Applications – Professional leave forms requesting permission to attend professional development activity | 1 year provided audited | Paper/ Electronic | | ☐ |
| 209 | Irregular Employee Contracts – Written agreement between the District and substitutes and other irregular employees benefits | 4 years | Paper/ Electronic | | ☐ |
| 210 | Unemployment Claims – Invoice maintained by Human Resources for the payment of unemployment claims approved or denied | 4 years provided audited | Paper/ Electronic | | ☐ |
| 211 | Unemployment Records – Documentation of unemployment records | 4 years | Paper/ Electronic | | ☐ |
| 212 | Applications (not hired) – Applications submitted of individuals not hired into the District | 1 year provided audited | Paper/ Electronic | | ☐ |
| 213 | Schedules of Employees | 1 year provided audited | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 214 | Teacher Personnel Reports (internal) | 1 year | Paper/ Electronic | | ☐ |
| 215 | I-9 Immigration Form – Form I-9 "Employment and Eligibility Verification" for all newly hired employees to verify their identity and authorization to work in the United States. Per Department of Homeland Security regulation 8 CFR 274a.2. | 1 year after employment termination | Paper/ Electronic | | ☐ |
| 216 | Job Descriptions – Description of expectations and responsibilities of each job | Until superseded or obsolete | Paper/ Electronic | | ☐ |
| 217 | Job Postings – Records documenting the posting and advertisement of employment positions, including, but not limited to, job descriptions, job requirements, application deadline, personnel requisition and compensation range. | 2 years | Paper/ Electronic | | ☐ |
| 218 | LPDC (Local Professional Development Committee) Licensure Records and Staff Summary Reports | Until superseded or obsolete | Paper/ Electronic | | ☐ |
| 219 | LPDC (Local Professional Development Committee) Meeting Minutes | 2 years | Paper/ Electronic | | ☐ |
| 220 | Staff Acceptable Use Policy – A Form signed by staff agreeing to use the District network responsibly for District related work | 6 years | Paper/ Electronic | | ☐ |
| 221 | Staff Profile – Listing including current position, licensure, degree, retirement credit, and contract information | 4 years | Paper/ Electronic | | ☐ |
| 222 | Annual Training Documentation – Record of trainings includes curricula, test results, materials presented, evaluations, tests administered; certification/hours/credits/ points awarded; sign-in sheets, and attendee lists | 4 years | Paper/ Electronic | | ☐ |
| 223 | Teachers Certificates and Temporary Professional Education Permits | 6 years | Paper/ Electronic | | ☐ |
| 224 | Employee Handbooks – Handbooks that each employee receives upon being hired | Until superseded or obsolete | Paper/ Electronic | | ☐ |
| 225 | Physician's Report of Work Ability – Physicians report of ability/restrictions for injured employees | 7 years | Paper/ Electronic | | ☐ |
| 226 | Background Files/Checks | 1 year after employment termination | Paper/ Electronic | | ☐ |
| 227 | All other employee records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **Student Records** | | | | |
| | **Student Records- (Long-Term)** | | | | |
| 301 | Student Information– Record of student's name, address, telephone number, grades, attendance record, classes attended, grade level completed, and year completed | Permanent | Paper/ Electronic | | ☐ |
| 302 | Grades/Transcripts – Reports of subjects studied and individual student grades. Retain final grade card each year and final high school transcript. If student withdraws, retain all transcripts | 75 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 303 | Individual State Test Results – IOWA, COGAT, OAT, OAA, OGT, OTELA, PSAT, ACT, SAT, PLAN, EXPLORE, OPT, ASVAB, TERRA NOVA, LAS, DIAL, KRA-L, IQ - achievement ability tests | 75 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| 304 | Foreign Exchange Records – Records of students from foreign countries | 75 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| 305 | Home Schooled Records – Records of students living within the District that are being schooled from home | 75 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| | **Student Records- (Short-Term)** | | | | |
| 306 | Registration/Withdrawal Information – Record of each time a student registers or withdraws within the District | 6 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| 307 | Activity Record – A list of activities students participated in during their high school years | 6 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| 308A | Student Worker Applications | 1 year | Paper/ Electronic | | ☐ |
| 308B | Student Work Permits- State issued permit for a student under the age of 18 to be employed | 3 years | Paper/ Electronic | | ☐ |
| 309 | Discipline Records – Record of discipline that a student has received including Saturday school, suspensions, and expulsions. Record includes notices to parents. | 1 year | Paper/ Electronic | | ☐ |
| 310 | Intervention Records – Intervention Assistance Team notes listing all of the interventions that were tried with a student to help improve academic achievement which may or may not lead to a referral for special education testing. Includes functional behavioral assessments and behavior intervention plans | 6 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| 311 | Bullying/Harassment Forms – Documentation of bullying/harassment incidents within the District, along with action taken | 6 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| 312 | Gifted and Talented Student Records – Student folders including but not limited to application or offer for participation, testing or eligibility determination records, progress reports, product assessment, samples of student's works, notes, and correspondence. | 6 years after graduation, withdrawal, or transfer | Paper/ Electronic | | ☐ |
| 313 | Attendance/Absence Records – Record of student attendance/absence including daily office call sheets, sign-in sheets, and doctor & parent's notes | 1 year | Paper/ Electronic | | ☐ |
| 314 | Cumulative Photo Records | Through graduation | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 315 | Curriculum Requests/Waivers/Substitutions - Records relating to student requests for classes or waivers/substitutions, where authorizing signature/initials from school district staff is required (principal, teacher, counselor, etc.). | Through graduation | Paper/ Electronic | | ☐ |
| 316 | Parent/Legal Guardian Permission Slips and Waiver Forms - Internet Access, Film Viewing, Field Trips, Other Activities | Until end of school year | Paper/ Electronic | | ☐ |
| 317 | Student Acceptable Use Policy – A form signed by parents permitting student online access, student information to be used in the media as well as parent/teacher email communication | 6 years | Paper/ Electronic | | ☐ |
| 318 | Statement of Requirements and Expectations Signed and Returned by Parent/Legal Guardian | Until end of school year | Paper/ Electronic | | ☐ |
| 319 | Student Schedules/Contact Information | Until superseded or graduation | Paper/ Electronic | | ☐ |
| 320 | Interim Grade Reports – Mid-term status report of student performance with teacher comments not part of permanent record | Until end of school year | Paper/ Electronic | | ☐ |
| 321 | Student Organization Activity Records – Purpose clauses/budgets of student clubs engaging in financial activities | 2 years after end of fiscal year | Paper/ Electronic | | ☐ |
| 322 | Adult Basic Literacy Education/General Education Development. (ABLE/GED) Records – Includes student registration forms, release of information form, student progress forms, and standardized assessment answer sheets. | 1 year | | | ☐ |
| 323 | Custody Court Documents – Verification of court established guardianship/custody | Until superseded or student reaches 18 years of age | Paper/ Electronic | | ☐ |
| 324 | Notice of Placement Termination – A notice of termination of placement relinquishing care and control, noticed received from the County Juvenile Court | 5 years | Paper/ Electronic | | ☐ |
| 325 | Child Abuse/Neglect Referral Letters – Records related to suspected child abuse as reported to Child Protective Services or to the proper law enforcement agency - includes reports, confirmation of submission, correspondence, inquiries, records documenting revisions/corrections, etc. | Through graduation | Paper/ Electronic | | ☐ |
| 326 | Teacher Grade Books/Records | 3 years provided audited | Paper/ Electronic | | ☐ |
| 327 | Pre-School Screening Profile – ASQ/SE, GGG assessment record. A screening profile used for pre-school students | 3 years | Paper/ Electronic | | ☐ |
| 328 | Open Enrollment Forms (accepted students) - Registration of student living outside the District enrolling into the school District | 5 years or until graduation | Paper/ Electronic | | ☐ |
| 329 | Open Enrollment Forms (denied students) | 1 year | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 330 | Transfer Records – Records of students transferring from one school to another (granted/not granted) | 5 years | Paper/ Electronic | | ☐ |
| 331 | Emergency Information – A form containing student emergency contact information | Until superseded or graduation | Paper/ Electronic | | ☐ |
| 332 | Health/Medical Records – Student visual and hearing screening and immunization records. Also includes record of health screenings such as audio/visual, physical therapy, speech-language pathology, and physician instructions | Until superseded or graduation | Paper/ Electronic | | ☐ |
| 333 | Health Logs – Record of health care services provided to students such as medication and first aid. | 2 years | Paper/ Electronic | | ☐ |
| 334 | Free/Reduced Price Lunch Application – Confidential applications for free and reduced lunch benefits | 4 years | Paper/ Electronic | | ☐ |
| 335 | Student Athlete Physicals | Until superseded or graduation | Paper/ Electronic | | ☐ |
| 336 | Student Following Working Parent applications and associated paperwork | 5 years or until graduation | Paper/ Electronic | | ☐ |
| 337 | Paperwork for students accepted by superintendent agreement | 5 years or until graduation | Paper/ Electronic | | ☐ |
| 338 | SF-14/SF14H Forms | 4 years | Paper/ Electronic | | ☐ |
| 339 | Tuition Requests | 5 years or until graduation | Paper/ Electronic | | ☐ |
| 340 | Tuition Waivers | 5 years or until graduation | Paper/ Electronic | | ☐ |
| 341 | All other student records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **Special Needs Records**<br>In accordance with OAC 3301-51-04 and 34 CFR 300.624, parents should be informed when personally identifiable information collected, maintained or used under OAC 3301-51-04 is no longer needed to provide educational services to the child. This information must also be destroyed at the request of the parent with the exception of information described in item 301.<br>These records may be needed beyond the retention period in connection with applications for social security or other benefits. However, unnecessarily long retention may jeopardize personal privacy. | | | | |
| 342 | Special Education Tutoring Reports – These files document tutoring provided to students through special programs. They include authorization forms signed by parents allowing their child to participate in the program. | 6 years after student graduates or would have normally graduated. | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 343 | Psychological Records (Restricted) – Records that document all students who are provided counseling, pyschological services by the school's counseling center. Clinicians provide treatment concerning personal problems, academic concerns, and career concerns. Records may include extensive notes made by providers concerning the assessment, diagnosis, treatment and contacts (written, telephone, or in person) with each student; referral letters; release of medical records; letters to agencies or others concerning the students; and other related material | 10 years after last contact. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1) | Paper/ Electronic | | ☐ |
| 344 | Evaluation Team Report (ETR) – A report that is developed after a series of assessments given by the school psychologist and others to determine whether or not the student has a disability | 6 years after student graduates or would have normally graduated. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1) | Paper/ Electronic | | ☐ |
| 345 | Individual Education Plan (IEP) – A legal binding document that lists goals/objectives and related services that the student will receive throughout the calendar year based on the assessment results of the ETR (Evaluation Team Report) | 6 years after student graduates or would have normally graduated. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1) | Paper/ Electronic | | ☐ |
| 346 | 504/ADA Plan – Plan that allows various accommodations for a student with a general disability | 6 years after student graduates or would have normally graduated. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1) | Paper/ Electronic | | ☐ |
| 347 | Protocols and related documentaion | 6 years after student graduates or withdraws from district | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 348 | Home Instruction (HI) – Records that identify students that are on home instruction due to medical or severe behavioral needs. These records include lesson plans, progress reports, grades and time sheets of the tutor that worked with the student | 6 years after student graduates or withdraws from district | Paper/ Electronic | | ☐ |
| 349 | Transfer of Home-Based Student to School/District - Records relating to the transfer of home-based student to school/district, including placement/ evaluation test results, notice of transfer, etc. | 3 years after student graduates or withdraws from district | Paper/ Electronic | | ☐ |
| 350 | Special Needs Records (Student not Eligible) - Referrals, evaluations, evaluation reports, and notices for students determined not to be eligible for the special education program | 5 years after student determined to be ineligible | Paper/ Electronic | | ☐ |
| 351 | All other special needs records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **BUILDING RECORDS** | | | | |
| 401 | Building Account Reports – Report of maintenance and custodial services accounts | Until superseded | Paper/ Electronic | | ☐ |
| 402 | Multi-Site Monitor Review Forms – A checklist to ensure that the site is properly following the CACFP guidelines. | 3 years plus current year provided audited | Paper/ Electronic | | ☐ |
| 403 | School Safety Plans – Records related to ensuring student and staff safety at school, including harassment and bullying prevention plans | 6 years after obsolete or until superseded | Paper/ Electronic | | ☐ |
| 404 | Records of Drills or Rapid Dismissals and School Safety Drills – Records of all tornado, fire, rapid dismissal, and school safety drills performed within a building. Records should include the identity of the person conducting the drill, date and time, notification method, staff members on duty and participating, number of occupants evacuated, special conditions simulated, problems encountered, heath conditions, and time required to accomplish complete evacuation. Records for school safety drills must contain the date and time of each drill conducted the prior school year and when they will be conducted in the current school year. See ORC 3737.73. | 1 year after end of fiscal year | Paper/ Electronic | | ☐ |
| 405 | Fire Inspection – Reports of building inspection performed by the city Fire Division | 4 years provided audited | Paper/ Electronic | | ☐ |
| 406 | Building Inspection Reports – Elevator, sprinkler, and alarm system reports | 2 years | Paper/ Electronic | | ☐ |
| 407 | Building Health Inspections – A record of all health inspections performed within a building | 2 years | Paper/ Electronic | | ☐ |
| 408 | Student Activity Records – Pay in forms, pay-out forms; account forms/Dist.; budget forms, requisitions; purchase order; ticket sales reports | 2 years | Paper/ Electronic | | ☐ |
| 409 | Receipt and Deposit Slips – copies of receipts for monies turned into the office | 2 years provided audited | Paper/ Electronic | | ☐ |
| 410 | Budget and Appropriation Records – Record of building budget | 2 years provided audited | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 411 | Requisitions and Purchase Orders – Record of money being requested and a record of items purchased form the building budget | 2 years | Paper/ Electronic | | ☐ |
| 412 | Inventories – Inventory of supplies, textbooks, and other materials purchased and used with the building | Until superseded | Paper/ Electronic | | ☐ |
| 413 | Student Handbook – Handbook containing student policies, regulations and codes | Until superseded | Paper/ Electronic | | ☐ |
| 414 | Building Security/Surveillance videos | Use for one cycle then reuse provided no action pending | Paper/ Electronic | | ☐ |
| 415 | OHSAA Membership | Until susperseded | Paper/ Electronic | | ☐ |
| 416 | All other building records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **Central Department Records** | | | | |
| | **Administrative Offices** | | | | |
| 501 | School Calendars – Calendar for in session/out of session school days as well as professional days for teachers | 4 years | Paper/ Electronic | | ☐ |
| 502 | Personnel Directory – Names, phone numbers and addresses of all employees | 2 years | Paper/ Electronic | | ☐ |
| 503 | Enrollment Record (by grade/building) | Permanent | Paper/ Electronic | | ☑ |
| 504 | Repair, Installation and Maintenance Records – A record of maintenance, installation and repairs performed on buildings within the District | 4 years provided audited | Paper/ Electronic | | ☐ |
| 505 | Building/Facilities and Equipment Inventory – Inventory of equipment owned by District | Until superseded provided audited | Paper/ Electronic | | ☐ |
| 506 | Building, Boiler & Maintenance Reports – Inspection/ maintenance reports for each building including boiler inspection/ maintenance | Until superseded provided audited | Paper/ Electronic | | ☐ |
| 507 | Prevailing Wage Records - Report of hourly wages, benefits and overtime, established by regulatory agencies for each trade and occupation employed in the performance of public work | 4 years provided audited | Paper/ Electronic | | ☐ |
| 508 | Rental Information – Records regarding facilities usage: building permits submitted to use facilities by school or community individuals, athletic teams or groups | 2 years provided audited | Paper/ Electronic | | ☐ |
| 509 | Work Orders – A report of all requested maintenance/custodial work | 2 years provided audited | Paper/ Electronic | | ☐ |
| 510 | Environmental Reports and Data – Reports on asbestos and other environmental issues | 4 years provided audited | Paper/ Electronic | | ☐ |
| 511 | Vandalism Reports – Reports of vandalism throughout the District | 4 years provided audited | Paper/ Electronic | | ☐ |
| 512 | Student Activity Purpose Clauses | Until superseded | Paper/ Electronic | | ☐ |
| 513 | Sales Potential Form (Student Activities) | 2 years provided audited | Paper/ Electronic | | ☐ |
| 514 | Sales Potential Forms – Fundraising permission form including the financial summary of the fundraiser upon completion of the event | 2 years provided audited | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 515 | Bids and Specifications (Unsuccessful) - Documentation of bids supplied by vendors for any project requesting bids in compliance with ORC | 1 year provided audited | Paper/ Electronic | | ☐ |
| 516 | Bids and Specifications (Successful) - Documentation of bids supplied by vendors awarded any project requesting bids in compliance with ORC | 4 years after completion of project | Paper/ Electronic | | ☐ |
| 517 | Contractor Files – Contractor resolutions, additions drawings, etc. | 4 years after completion of project provided audited and no action pending | Paper/ Electronic | | ☐ |
| 518 | Lists of Resident Students attending Nonpublic Schools | 4 years | Paper/ Electronic | | ☐ |
| 519 | Reduction in Force Lists | Until superseded | Paper/ Electronic | | ☐ |
| 520 | Calamity Day Waivers | 3 years | Paper/ Electronic | | ☐ |
| 521 | All other administrative office records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **Transportation Department** | | | | |
| 522 | Driver Physical – A report of the annual physical performed on drivers | 6 years (See OAC 3301-83-07-E-7) | Paper/ Electronic | | ☐ |
| 523 | Daily Bus Schedules – may show bus route, time trip began and ended, number of pupils carried, and drivers signature | 2 years provided audited | Paper/ Electronic | | ☐ |
| 524 | Fuel Consumption Data – Fuel records for the buses | 2 years provided audited | Paper/ Electronic | | ☐ |
| 525 | Transportation Records – Transportation requests received from schools that include student and busing information | 2 years provided audited | Paper/ Electronic | | ☐ |
| 526 | Field Trip Forms/Volunteer Driver Forms – Forms from building requesting busing for field trips | 2 years provided audited | Paper/ Electronic | | ☐ |
| 527 | Preventive Maintenance Reports – A report of work performed to maintain equipment | 2 years provided audited | Paper/ Electronic | | ☐ |
| 528 | Warranty/Guarantee – Warranty of equipment | Life of equipment | Paper/ Electronic | | ☐ |
| 529 | Plant and Equipment Inventory | Until superseded provided audited | Paper/ Electronic | | ☐ |
| 530 | Vendor Data: W-9 & 1099 documents maintained as long as active vendor then retention period is applied. | 4 years & current provided audited | Paper/ Electronic | | ☐ |
| 531 | Accident Reports - Law enforcement reports regarding bus accidents | 3 years provided no action pending | Paper/ Electronic | | ☐ |
| 532 | Vehicle Registration – Certificates of title and registration paperwork from the BMV for cars, vans, trucks, and buses. | Life of vehicle | Paper/ Electronic | | ☐ |
| 533 | Vehicle License - BMV licensing documentation of motor vehicles | 1 year after termination | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 534 | Vehicle Records – Vehicle insurance, finance paperwork | As long as vehicle is owned by District | Paper/ Electronic | | ☐ |
| 535 | Driver Certification – Bus driver certification form | 1 year after termination | Paper/ Electronic | | ☐ |
| 536 | Supplies Inventory – Shop/mechanic inventory | Until superseded | Paper/ Electronic | | ☐ |
| 537 | Vehicle Defect Report – Record of defects on each bus | Life of vehicle | Paper/ Electronic | | ☐ |
| 538 | Bus on Board Security & Surveillance videos | Use for one recording cycle then reuse provided no action pending | Paper/ Electronic | | ☐ |
| 539 | Improper Student Conduct on School Buses – Records documenting instances of improper student conduct on school buses including bus route, time of incident, nature of incident, and students name | 1 year | Paper/ Electronic | | ☐ |
| 540 | Application for Special Transportation - Application for students with physical disabilities/medical problems | 4 years | Paper/ Electronic | | ☐ |
| 541 | Bus Condition Checklist - Daily evaluation of bus by drivers | 1 year | Paper/ Electronic | | ☐ |
| 542 | Driver Abstract | 1 year | Paper/ Electronic | | ☐ |
| 543 | All other transportation department records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **Food Services Department** | | | | |
| 544 | Food Service Records – Financial information, breakfast cost sheets, milk sold, menus, students served | 4 years provided audited | Paper/ Electronic | | ☐ |
| 545 | Lunchroom Records – Cashier's daily production sheets from each building, cash register tapes | 4 years provided audited | Paper/ Electronic | | ☐ |
| 546 | Lunchroom Reports – Confidential applications for free and reduced lunch benefits | 4 years provided audited | Paper/ Electronic | | ☐ |
| 547 | Inventories – Inventory of food supplies | 4 years provided audited | Paper/ Electronic | | ☐ |
| 548 | Lunchroom/ Food Service License – Current food service license, issued annually by the board of health of the health district in which the food service operation is located. | 1 year after expiration | Paper/ Electronic | | ☐ |
| 549 | Vendor Food Service Contract – Contract between the District and an outside vendor providing meals and snacks | 3 years plus current year provided audited | | | ☐ |
| 550 | Schedule for School Breakfast/Lunch Programs – Includes plan and backup documentation submitted to Ohio Board of Education for program approval | 4 years provided audited | Paper/ Electronic | | ☐ |
| 551 | Health Inspections | 4 years | Paper/ Electronic | | ☐ |
| 552 | Vendor Food Service Contract – Contract between the District and an outside vendor providing meals and snacks | 3 years plus current year provided audited | | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 553 | Staff professional development documentation | 4 years | Paper/ Electronic | | ☐ |
| 554 | All other food service department records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **Financial Records** | | | | |
| 601 | Audit Reports – Past management evaluation reports, monthly claim documentation, master lists, and income eligibility applications | 4 years provided audited | Paper/ Electronic | | ☐ |
| 602 | Annual Financial Reports – Financial reports prepared from the accounting system that can be reproduced from the computer records. This includes: Annual Ledgers, Budget Ledgers, Vendor Listing, Check Register, Invoice List, Purchase Order Listing, Accounts Reports, Financial Summary and Detail Reports | 4 years provided audited | Paper/ Electronic | | ☐ |
| 603 | Activity Fund Cash Journal & Ledger | 4 years provided audited | Paper/ Electronic | | ☐ |
| 604 | Bond Register | 10 years after issue expires | Paper/ Electronic | | ☐ |
| 605 | Securities | 10 years | Paper/ Electronic | | ☐ |
| 606 | Investment Ledger – Report of investments owned by District | 4 years provided audited | Paper/ Electronic | | ☐ |
| 607 | Foundation Distribution – Report from the Ohio Dept. of Education for bi-monthly foundation (state basic aid) receipts | 4 years provided audited | Paper/ Electronic | | ☐ |
| 608 | Tax Settlements (Semi-Annual) and Advances – Property tax settlement sheet including advances from the County Auditor included in the receipts | 4 years provided audited | Paper/ Electronic | | ☐ |
| 609 | Budgets (Annual) - Tax budget that is submitted annually to the County Auditor | 4 years provided audited | Paper/ Electronic | | ☐ |
| 610 | Budget Working Papers | 2 years provided audited | Paper/ Electronic | | ☐ |
| 611 | Insurance Policies – Contracts between insurer and the School district where the insurer, in exchange for premium payment, pays for damages to the School District which are caused by covered perils under the policy language. | 15 years after expiration provided all claims settled | Paper/ Electronic | | ☐ |
| 612 | Contracts – An agreement with specific terms between an entity with the School District | 4 years provided audited | Paper/ Electronic | | ☐ |
| 613 | Bonds and Coupons | Until redeemed provided audited | Paper/ Electronic | | ☐ |
| 614 | Accounts Payable Ledger – Outstanding payables | 4 years provided audited | Paper/ Electronic | | ☐ |
| 615 | Accounts Receivable Ledgers – Outstanding revenue due to the school District | 4 years provided audited | Paper/ Electronic | | ☐ |
| 616 | Vouchers, Invoices and purchase orders – A voucher is a documentary record of a business transaction (i.e. check or invoice). A purchase order is a document itemizing products/services to be purchased from a vendor. Serves as a contract. | 10 years provided audited. ORC 3313.29. | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 617 | State Program Files – Auxiliary services, records of non-public school funding provided by the Ohio Department of Education and through public and private grants | 4 years provided audited | Paper/ Electronic | | ☐ |
| 618 | Federal Program Files | 4 years provided audited | Paper/ Electronic | | ☐ |
| 619 | Travel Expense Vouchers – Document of expenditures for travel of district employees | 4 years provided audited | Paper/ Electronic | | ☐ |
| 620 | Tax Anticipation Notes – Documents related to the preparation, sale and history related to issuance of notes borrowed against future tax dollars | 10 years provided audited | Paper/ Electronic | | ☐ |
| 621 | State Reimbursement Settlement Sheets | 4 years provided audited | Paper/ Electronic | | ☐ |
| 622 | Unemployment Claims – Documentation of unemployment for application of unemployment benefits | 4 years | Paper/ Electronic | | ☐ |
| 623 | Employee Bonds, Board Member Bonds – Documents related to the performance and theft insurance bidder held on required employee and board members | 4 years | Paper/ Electronic | | ☐ |
| 624 | Certificate of Estimated Resources – County document supplied to the district certifying the estimated resources prepared by the District | 4 years provided audited | Paper/ Electronic | | ☐ |
| 625 | Appropriation Resolutions – Resolution approved by the Board of Education establishing and amending the appropriation for the District | 4 years | Paper/ Electronic | | ☐ |
| 626 | Tax Apportionments (Semi-Annual) – Documentation prepared by the County Auditor and report to the District to record receipt of property tax settlement | 4 years | Paper/ Electronic | | ☐ |
| 627 | Canceled Checks and Bank Settlements – All checking accounts reconciliation and statements | 4 years provided audited | Paper/ Electronic | | ☐ |
| 628 | Publication Notice – Legal notice of publication in the newspaper | 2 years | Paper/ Electronic | | ☐ |
| 629 | Tuition Fees and Payments – Receipt records at the Treasurer's Office | 4 years provided audited | Paper/ Electronic | | ☐ |
| 630 | Unpaid Student Fees | Through graduation | Paper/ Electronic | | ☐ |
| 631 | School Finance (S.F.) Monthly Statements – Bi-monthly reports for the Ohio Dept. of Education to record receipts and expenditures related to the foundation payments. | 4 years provided audited | Paper/ Electronic | | ☐ |
| 632 | Investment Records – Individual record of investments bank confirmations, wire transfers, copies of CD's | 4 years provided audited | Paper/ Electronic | | ☐ |
| 633 | Travel Expense Reports | 4 years provided audited | Paper/ Electronic | | ☐ |
| 634 | State Sales Tax Reports – State of Ohio semi-annual sales tax filings, reporting any taxable sales. | 4 years provided audited | Paper/ Electronic | | ☐ |
| 635 | Student Activity Funds – Student activity funds, pay in forms, bank deposit forms and receipts confirming deposits made into student activity accounts | 4 years provided audited | Paper/ Electronic | | ☐ |
| 636 | Check Registers – Lists of checks issued by the District | 4 years provided audited | Paper/ Electronic | | ☐ |
| 637 | Deposit Slips/Cash Proofs – Receipts for deposit slips | 4 years provided audited | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 638 | Receipt Books – Receipts issued for money received. | 4 years provided audited | Paper/ Electronic | | ☐ |
| 639 | Extra Trip Records | 2 years provided audited | Paper/ Electronic | | ☐ |
| 640 | Monthly Financial Reports – Report generated from the system to report the financial status the District prepared on a monthly basis | 4 years provided audited | Paper/ Electronic | | ☐ |
| 641 | Accounting Data | 4 years provided audited | Paper/ Electronic | | ☐ |
| 642 | Service Contracts - Contracts for services provided from an outside education | 4 years provided audited | Paper/ Electronic | | ☐ |
| 643 | State Subsidy Reports – Applications for driver education, pupil transportation, special education, etc. | 4 years provided audited | Paper/ Electronic | | ☐ |
| 644 | Delivery/Packing Slips | 1 year | Paper/ Electronic | | ☐ |
| 645 | Requisitions – Documents used to request the purchase of something that is submitted for approval and then can be converted to a purchase order | 1 year | Paper/ Electronic | | ☐ |
| 646 | Non-Sufficient Fund Checks Documentation & Notifications | 4 years provided audited | Paper/ Electronic | | ☐ |
| 647 | ODE forms, filings and documentation (SF-6 Excess Cost, Catastrophic Cost, etc.) | 4 years provided audited | Paper/ Electronic | | ☐ |
| 648 | Bank Reconciliations | 4 years provided audited | Paper/ Electronic | | ☐ |
| 649 | 412 Certificates | 4 years provided audited | Paper/ Electronic | | ☐ |
| 650 | County forms, filings and documentation (Board of Revision Tax Complaints, etc.) | 4 years provided no action pending | Paper/ Electronic | | ☐ |
| 651 | Budget and Appropriation Workpapers and Documentation | 4 years provided audited | Paper/ Electronic | | ☐ |
| 652 | Five Year Forecast and supporting documentation | 4 years provided audited | Paper/ Electronic | | ☐ |
| 653 | 1099 Statements | 4 years provided audited | Paper/ Electronic | | ☐ |
| 654 | E-Rate Funding Applications, Reports and other documentation | 6 years | Paper/ Electronic | | ☐ |
| 655 | All other financial reports and documentation | 2 year | Paper/ Electronic | | ☐ |
| | **Payroll Related Records** | | | | |
| 701 | Salary Continuation Agreement – Agreement stating full or partial compensation during period of disability | 7 years | Paper/ Electronic | | ☐ |
| 702 | Payroll Ledgers – Record of gross to net calculations by employee | 75 years | Paper/ Electronic | | ☐ |
| 703 | Earning Registers – Record of gross to net calculations by employee and by calendar year | 75 years | Paper/ Electronic | | ☐ |
| 704 | Monthly Payroll Reports – A record of leave usage and accumulation by employee as well as retirement contributions by employee | 75 years | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 705 | Bureau of Employment Service Quarterly Reports – OBES reports (quarterly earnings and record of weeks worked by employee) | 7 years | Paper/ Electronic | | ☐ |
| 706 | W-2's and W-4's – Employer's copy of calendar year record of taxable earnings, a record of employee federal exemptions | 6 years and current provided audited | Paper/ Electronic | | ☐ |
| 707 | Federal Income Tax – Quarterly and annual record of federal income tax withheld and remitted IRS form 941 | 6 years and current provided audited | Paper/ Electronic | | ☐ |
| 708 | Ohio Income Tax – Monthly and annual record of Ohio Income tax withheld and remitted IT-4 | 6 years and current provided audited | Paper/ Electronic | | ☐ |
| 709 | City Income Tax – Monthly and annual record of municipality income tax withheld and remitted | 6 years and current provided audited | Paper/ Electronic | | ☐ |
| 710 | School Income Tax – Monthly and annual record of School District income tax withheld and remitted SDIT-1 | 6 years and current provided audited | Paper/ Electronic | | ☐ |
| 711 | Payroll Reports – Payroll deduction and distribution reports | 4 years provided audited | Paper/ Electronic | | ☐ |
| 712 | Payroll Update Listing | 4 years provided audited | Paper/ Electronic | | ☐ |
| 713 | Payroll Calculations – Paper and electronic reports used to balance gross net calculations | 4 years provided audited | Paper/ Electronic | | ☐ |
| 714 | State Teachers System and School Employees Retirement System Waivers – Waiver forms for students an/or jobs not eligible for retirement withholding | Permanent | Paper/ Electronic | | ☐ |
| 715 | State Employees Retirement System (SERS) Reports | 4 years provided audited | Paper/ Electronic | | ☐ |
| 716 | State Teachers Retirement System (STRS) Reports | 4 years provided audited | Paper/ Electronic | | ☐ |
| 717 | Annuity Reports | 4 years provided audited | Paper/ Electronic | | ☐ |
| 718 | Benefit Folders/Reports – Listing of employee's benefit enrollments, etc. | 4 years provided audited | Paper/ Electronic | | ☐ |
| 719 | Employee Requests and/or Authorization for Leave Forms – Request for sick, vacation, personal, or other leave | 4 years provided audited | Paper/ Electronic | | ☐ |
| 720 | Deduction Reports – Voluntary payroll deductions per pay that include all deduction withholdings for each employee | 4 years provided audited | Paper/ Electronic | | ☐ |
| 721 | Employee Vacation/Sick Leave Records - Records of each employee's sick and vacation leave | 4 years provided audited | Paper/ Electronic | | ☐ |
| 722 | Time Sheets - Record of hours worked | 4 years provided audited | Paper/ Electronic | | ☐ |
| 723 | Overtime Authorization | 4 years | Paper/ Electronic | | ☐ |
| 724 | Employee Insurance Bills – Monthly reconciliation of employee medical, dental and life insurance bills | 4 years provided audited | Paper/ Electronic | | ☐ |
| 725 | Paycheck Register – Listing of checks issued each pay | 4 years provided audited | Paper/ Electronic | | ☐ |
| 726 | Payroll Bank Statement – Includes bank statements and reconciliation | 4 years provided audited | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 727 | Deduction Authorization – Forms to withhold deductions from an employee's pay | Until superseded or employee terminates | Paper/ Electronic | | ☐ |
| 728 | Court Ordered Garnishments | 4 years after cause fully paid | Paper/ Electronic | | ☐ |
| 729 | All other payroll related records and documentation | 2 years | Paper/ Electronic | | ☐ |
| | **Reports** | | | | |
| 801 | State Audits /GAAP (Generally Accepted Accounting Principles) Reports– Annual financial audit reports | 4 years | Paper/ Electronic | | ☐ |
| 802 | Special Education (S.E.) Reports – Annual | 4 years | Paper/ Electronic | | ☐ |
| 803 | Vocation Education (V.E.) Reports - Annual | 4 years | Paper/ Electronic | | ☐ |
| 804 | Ohio Common Core Data (OCCD) Reports: Data on revenues and expenditures per pupil made by school districts. | 4 years | Paper/ Electronic | | ☐ |
| 805 | Drivers Education Report | 4 years | Paper/ Electronic | | ☐ |
| 806 | Ohio Department of Education (ODE) Reports – Academic reports from the Ohio Department of Education | 4 years | Paper/ Electronic | | ☐ |
| 807 | Alternative Learning Experience - Records documenting student participation in an alternative learning experience program. Includes but is not limited to: Letter of attestation/statement of understanding; district release form and/or shared agreement (if sharing student); written student learning plan (start/stop dates), approval date when district/teacher approves plan; estimated hours per week of student participation; instructional materials needed; timelines and methods for evaluating student progress; specific learning goals/objectives/ requirements; student/teacher instructional two-way interactions/contacts/ monthly progress evaluations and weekly communications with student (and parent/legal guardian for student grades K-8) including dates when occurred | 4 years | Paper/ Electronic | | ☐ |
| 808 | Civil Rights Reports – U.S. Department of Education Civil Rights Data Collection and any past reports | Permanent | Paper/ Electronic | | ☑ |
| 809 | Title IX Reports – Includes any required reporting as requested by state or federal agencies | 4 years | Paper/ Electronic | | ☑ |
| 810 | State Minimum Standards – A record of minimum standards given to the District by the State Department | 4 years | Paper/ Electronic | | ☑ |
| 811 | Personnel State Reports (SF-1, CS-1) | 4 years provided audited | Paper/ Electronic | | ☐ |
| 812 | Worker's Comp Reports | 4 years | Paper/ Electronic | | ☐ |
| 814 | Bank Balance Certification (Co. Auditor) | 4 years | Paper/ Electronic | | ☐ |

| Sch. # | Record Series and Description | Retention Period | Media Type | For use by Auditor of State or LGRP | RC-3 Required by LGRP |
|---|---|---|---|---|---|
| 815 | Transportation Reports – State transportation reports, T-1 and T-2 | 4 years provided audited | Paper/ Electronic | | ☐ |
| 816 | EMIS Reports | 4 years | Paper/ Electronic | | ☐ |
| 817 | All other reports | 2 years | Paper/ Electronic | | ☐ |
| | **General Records** | | | | |
| 901 | Directives, Standards, Laws for Local, State, and Federal Governmental Agencies | Until superseded or obsolete | Paper/ Electronic | | ☐ |
| 902 | Executive Correspondence – Correspondence of the District Superintendent and Administrative staff dealing with significant aspects of the administration of the District. Includes information concerning agency policies, procedures, program, fiscal and personnel matters. | 2 years; file with related records if content requires longer retention; appraise for historical value. | Paper/ Electronic | | ☐ |
| 903 | General Correspondence – Requests for information pertaining to interpretations and other misc. inquiries; informative – does not attempt to influence policy. Including copies of outgoing correspondence maintained for reference purposes. | 2 years | Paper/ Electronic | | ☐ |
| 904 | District Email Records (all emails sent or received by a District email account) | 2 year | Paper/ Electronic | | ☐ |
| 905 | Non-Employee BCI/FBI Records | 1 year provided audited | | | ☐ |
| 906 | Transient Correspondence/Material– All informal and/or temporary messages and notes, including email, texts and voice mail messages, and all drafts used in the production of public records that do not set policy, establish guidelines or procedures, certify a transaction or become a receipt. Includes communications which convey information of temporary importance, referral letters, and requests for routine information or publications provided to the public by the District which are answered by standard form letters | Until no longer of administrative value | Paper/ Electronic | | ☐ |
| 907 | Copies, Duplicates, Non-Records - Items not included in the scope of official records as defined by ORC 149.011 (G) which may include convenience copies, described as non-official copies of records, used for convenient reference, that duplicate official records kept by the office of record. | Until no longer of administrative value | Paper/ Electronic | | ☐ |
| 908 | Exposure Reports – Report of contact with blood or other potentially infectious materials | 7 years | Paper/ Electronic | | ☐ |
| 909 | Incident/Accident Reports – A report of student/employee injuries or accidents including place, | 7 years provided no action pending | Paper/ Electronic | | ☐ |
| 910 | District Newsletter Published in Community | 2 years | Paper/ Electronic | | ☐ |
| 911 | All other general records and documentation | 2 years | Paper/ Electronic | | ☐ |

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C.