

*Disclaimer: The retention schedule below is not all inclusive. Specific questions concerning record retention should be referred to the district's legal counsel or accountant, as appropriate. This document should not be considered as legal advice and is not intended as a substitute for the advice of your board's legal counsel.*

### RECORDS RETENTION SCHEDULE

Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Accounts Payable	Check Stubs; Check Register; Cancelled Checks; Duplicate Deposit Slips; Financial Software Reports Posting Checks; Invoices and Billings; Journal Entries	6 Years After CFY (Note: Monthly Reports Containing Information That Will be Printed on a Year-End Report May be Destroyed 5 Years After CFY)	Shred Documents with Account Numbers; Recycle Remaining Documents	BM
Accounts Payable	Property	Keep Records Until the Period of Limitations Expires for the Year in Which You Dispose of the Property	Shred Documents with Account Numbers; Recycle Remaining Documents	BM
Accounts Receivable	Billing Records; Journal Entries; Receipt Books; Records of Delinquent Accounts/Collections; Records of Local, State, Federal, and Grant Funds Received; Revenue Report	5 Years After CFY	Shred Documents with Account Numbers; Recycle Remaining Documents	BM
Audit Reports	External Independent & State Auditor Reports; Internal Audit Reports Documentation of Auditing or Review Procedures Applied, Evidence Obtained, and Conclusions Reached	5 Years After CFY	Send to State Archives	BM
Bank Records	ACH Notices; Annual Interest Statements (1099-INT); Bank Account Agreements/Signature Card Copies; Bank Loan Agreements; Bank Reconciliations; Bank Statements for All funds; Certificates of Deposit; Deposit Books; Pledged Collateral/Letters of Credit - Current & Expired; Savings Books	5 Years After CFY	Shred	BM
Benefit Records (Excluding Leaves)	403b Annuity Billings/Payment Confirmation	5 Years After Separation	Shred	BM
Benefit Records (Excluding Leaves)	Certificates of Insurance	6 Years After Final Action	Shred	BM
Benefit Records (Excluding Leaves)	Benefit Bills (e.g., BCBS, AFLAC, Etc.)	6 Years After Plan Year	Shred	BM
Benefit Records (Excluding Leaves)	COBRA Forms	6 Years After Final Action	Shred	BM
Benefit Records (Excluding Leaves)	COBRA Payments	7 Years After Final Action	Shred	BM
Benefit Records (Excluding Leaves)	Flex Benefit, 125/Cafeteria Plan Application Form	5 Years After Separation	Shred	BM

**Record Administrator Key: AD = Athletic Director, Admin = Administrator, BM = Business Manager, HR = Human Resources Manager, S = Superintendent, P = Principal**

## RECORDS RETENTION SCHEDULE

Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Benefit Records (Excluding Leaves)	Flex Benefit, 125/Cafeteria Plan Billings	6 Years After Plan's Termination	Shred	BM
Benefit Records (Excluding Leaves)	Insurance Applications (Medical, Vision, AFLAC, Dental, Etc.)	5 Years After Separation	Shred	BM or HR
Benefit Records (Excluding Leaves)	Insurance Monthly Statements	6 Years from Date Paid	Shred	BM or HR
Benefit Records (Excluding Leaves)	Leave Balance Reports ( <b>Also see Leave Records Section</b> )	3 Years From Date of Creation	Shred	BM or HR
Benefit Records (Excluding Leaves)	PERS Defined Benefit Retirement Membership Application (SFN 2561)	1 Year After Separation	Contact PERS to Ensure Info is on File, Then Shred	BM
Benefit Records (Excluding Leaves)	PERS Designation of Beneficiary or Group Retirement Plan (SFN 25060)	1 Year After Separation	Contact PERS to Ensure Info is on File, Then Shred	HR
Benefit Records (Excluding Leaves)	PERS Monthly Report of Contributions	1 Year After Separation	Shred	BM
Benefit Records (Excluding Leaves)	TFFR Member Action Form (SFN 5098)	1 Year After Separation	Contract TFFR to Ensure Info is on File, Then Shred	BM
Benefit Records (Excluding Leaves)	TFFR Member Certification (SFN 11732)	1 Year After CFY	Shred	BM
Benefit Records (Excluding Leaves)	TFFR Monthly Report of Contributions	5 Years After Creation	Contract TFFR to Ensure Info is on File, Then Shred	BM
Benefit Records (Excluding Leaves)	TFFR Notice of Termination (SFN 17144)	5 Years After Separation	Contract TFFR to Ensure Info is on File, Then Shred	BM
Benefit Records (Excluding Leaves)	Waiver of Insurance	5 Years After Separation	Shred	BM
Budget Records	Approved Annual Budget; Budget Hearing Notice; Budget Requests from Departments/Schools; Certificate of Levy; Tentative Proposed Budget; Working Papers, Taxable Valuation Forms from the County	10 Years for Date of Board Approval	Recycle	BM
Construction Bond Records	Affidavit of Signatures; BND Commitment Letter; Bond Counsel Opinion; Bond Insurance documents; Bond Resolution/Results of Sale; Official Statement; Certificate of Debt Capacity; Certificate of Registrar; Closing Certificate; County Auditor's Certificate Rating Letter; Debt service Schedule; Distribution List; DTC Blanket Issuer Letter of Representations; Initial Resolution for the Issuance of Bonds; Resolution for Debt Limit Increase; IRS Form 8038-g; Notice of Election and Affidavit of Publication	6 Years After Date of Creation	Send to State Archives	BM

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Construction Bond Records	Notice of Sale and Affidavit of Publication; Paying agent Agreement; Resolution Calling Special Election; Resolution Canvassing Returns; Resolution Providing for the Sale of Bonds; Specimen Bonds r-1 & r-19; Tax Certificate; Underwriter's Certificate and Receipt	6 Years After Date of Creation	Send to State Archives	BM
Election Records	Board Election Ballots, Including Absentee - 1 Copy of Official Ballot	PERMANENTLY	N/A	BM
Election Records	Board Election Ballots, Including Absentee - Ballots Completed by Voters	Retain 22 Months	Shred	BM
Election Records	Board Election Notices	45 Days After Election	Recycle	BM
Election Records	Certificate of Election	Retain for 10 Years After CFY	Send to State Archives	BM
Election Records	Election Official Oaths	45 Days After Election	Recycle	BM
Election Records	Oath of Office	Retain for Entire Term of Office + 6 Years	Send to State Archives	BM
Election Records	Petitions: Recall and Election	10 Years from Date Approved	Send to State Archives	BM
Election Records	Poll Books	10 Years from Date of Election	Send to State Archives	BM
Election Records	Statement of Interest (SFN 10172)	10 Years After CFY	Recycle	BM
Employment Contracts & Rehiring Forms	Employee Work Agreement	6 Years After Separation	Shred	S or HR
Employment Contracts & Rehiring Forms	Employment Contracts	6 Years After Separation	Shred	BM
Employment Contracts & Rehiring Forms	Negotiated Agreements (Including Salary Schedules)	6 Years After Separation of Last Employee Covered by the Agreement (e.g. Last Teacher Hired in 1980 Retires in 2015 - Retain 1980 Negotiated Agreement Until 2021)	Recycle	BM
Employment History	Dates of Employment, Pay Changes, Dates of Actions Taken Such as Transfers, Promotions, Disciplinary Measures, Etc.	50 Years After Separation	Shred	BM or HR
Employment History	Discrimination & Harassment Grievance Investigation Materials	Until Separation + 6 Years	Shred	Grievance Coordinator
Employment History	Complaints About Personal Investigation Report	Until Separation + 6 Years	Shred	Grievance Coordinator
End of Fiscal Year Fixed Asset Inventory	Annual Individual Staff Inventories Listing all Items; Fixed Asset Reports; Invoices of Assets Used in Updating Annual Report Listing Item, Cost and Serial Number	At Least 3 Years After CFY and Until the Period of Limitations Expires for the Year in Which You Dispose of the Property	Recycle	BM

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Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Federal Grant Records	Accounts Payable Records Specific to Federal Grants; Action Taken on Federal & State Grants Awarded to the District; Annual Monitoring Documents; Annual Parent Meeting Minutes; Annual Review Meeting Minutes; Approved Budget; Assurance of Time; Audit Report; Bid Documents; Consolidated Application; Contracts; Correspondence; filing Guidelines; Inventory; Letter of Intent; Mid-Year/Final Financial Reports; Professional Development Program Approvals; Progress Report; Project Approval Letters; Records of Money Spent as Approved by the Appropriate Grantor; Reimbursement Requests; Request for Funds	5 Years After Submission of Final Expenditure Report, Including Any Carryover Funds, OR the Last Audit, Monitoring Litigation Activity - Whichever is Later.	Shred	Admin, BM
Financial Reports	Account Inquiry Report; Balance Sheet Report; Bank Reconciliation Report; Cash Receipt Listing; Check Registers; Entry File Report; Expenditure Summary Report; Fund Balance Recap; Manual Journal Entry Listing; Outstanding Check Listing; Revenue Summary Report; Trial Balance Report	5 Years After CFY	Shred Documents with Account Numbers; Recycle Remaining Documents	BM
Financial Reports	Business Manager's Financial Reports	10 Years After CFY	Shred	BM
Hiring	Applications and Resumes (Hires and Non-Hires)	6 Years After Last Action	Shred	Admin, BM
Hiring	Cover Letters	6 Years After Hiring Decision	Recycle or Shred if it Contains SS#	S or HR
Hiring	Criminal History Records	6 Years After Hiring Decision (if Not Hired)	Shred	Record Adjudicator
Hiring	Criminal History Records	6 Years After Separation if Hired	Shred	Record Adjudicator
Hiring	Credit Checks	2 Years After Selection Process	Shred	S or HR
Hiring	Driver's License Copy	1 Year After Date of Termination	Shred	BM
Hiring	Employment Contracts	6 Years After Separation	Shred	S or HR
Hiring	Job Advertisement/Announcement	6 Years After Hiring Decision	Recycle	S, HR, or BM
Hiring	Job Application	6 Years After Hiring Decision	Shred	BM or HR
Hiring	Job Description	6 Years After Separation	Recycle	HR
Hiring	Job Service New Hire Report	1 Year After Submission	Shred	BM or HR
Hiring	I-9	4 Years After CFY or 3 Years After Separation (Whichever is Longer)	Shred	BM
Hiring	Interview Notes	6 Years After Hiring Decision	Shred	HR
Hiring	Interview Questions	6 Years After Hiring Decision	Recycle	HR
Hiring	Offer of Employment	6 Years After Separation	Shred	BM or HR
Hiring	Orientation Checklist	6 Years After Separation	Recycle	BM, HR, or P

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Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Hiring	Reference Check Information/Notes (e.g. Verification of Employment)	6 Years After Decision to Hire	Shred	BM
Hiring	Reference Letters/Checks	6 Years After Decision to Hire	Shred	BM
Hiring	Rejection of Employment Letter	6 Years After Issuing	Shred	BM, HR, or S
Hiring	Resumes	6 Years After Decision to Hire	Shred	BM, HR, or S
Hiring	Social Security Card Copy	1 Year After Separation	Shred	BM
Hiring	Social Security Verification	6 Years After Separation	Shred	BM
Home Schooled Student Records	Statement of Intent	CFY + 4 Years	Shred	Admin
Insurance & Surety Bonds	Automobile Liability Records; General Liability Records; Property Insurance Records; Copy of Claims; Claims Correspondence; Claims Payments	6 Years After Last Action	Shred	BM
Insurance & Surety Bonds	Employee Bonds	While Active and at Least 5 Years After Expired	Shred	BM
Leave Records	Conference/Seminar Registration Information	CFY + 4 Years	Recycle	BM
Leave Records	FMLA Forms	5 Years After Separation	Shred	BM or HR
Leave Records	Leave Balance Reports	3 Years From Date of Creation	Shred	BM or HR
Leave Records	Leave Request Forms - Including Sick Bank, but Other Than FMLA	5 Years After Separation	Shred	BM
Leave Records	Travel Authorization Request/Approval Form	CFY + 4 Years	Shred	BM
Leave Records	Travel Reimbursements Log/Reports	CFY + 4 Years	Shred	BM
Licenses & Academic Records	Academic Records/Transcripts	Until Update - Destroy Upon Separation	Shred	BM or HR
Licenses & Academic Records	Teacher License (Copy)	Until Updated and 1 Year After Separation	Shred	BM or HR
Medical, Drug Testing, & WSI Records	Drug Testing	7 Years After Separation	Shred	HR or Admin
Medical, Drug Testing, & WSI Records	Certificate of Fitness for Duty (Bus Drivers)	Until New Certificate is Received; Upon Separation Retain Final Certificate for 6 Years	Shred	BM, HR, or Facilities Manager
Medical, Drug Testing, & WSI Records	Medical Release to Return to Work	6 Years After Separation	Shred	BM or HR
Medical, Drug Testing, & WSI Records	Medical Records	6 Years After Separation	Shred	HR or Admin
Medical, Drug Testing, & WSI Records	Physical Exam Records	Until Updated or 6 Years After Separation	Shred	HR
Medical, Drug Testing, & WSI Records	WSI Annual Report	CFY + 2 Years	Shred	BM

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Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Medical, Drug Testing, & WSI Records	WSI Claims	4 Years After Final Action	Shred	BM
Meeting Records	Board Minutes	PERMANENTLY	N/A	BM
Meeting Records	Committee Meeting Minutes	Retain for 10 Years After CFY	Send to State Archives	BM
Meeting Records	Executive Session Tapes if <b>NOT</b> related to Negotiations, Nonrenewal, Discharge, or Expulsion	6 Months	Destroy	BM
Meeting Records	Executive Session Tapes if related to Negotiations, Nonrenewal, Discharge, or Expulsion	6 Years	Destroy	BM
Meeting Records	Meeting Agendas	Retain for 10 Years After CFY	Send to State Archives	BM
Meeting Records	Meeting Packets	Retain for 10 Years After CFY	Send to State Archives	BM
Operational Documents & Agreements	Accreditation Reports	6 Years After CFY	Shred	Admin, BM
Operational Documents & Agreements	Annexation, Reorganization, and Dissolution Committee Material	PERMANENTLY	N/A, File Copy with Co. Supt. & State Archives	BM
Operational Documents & Agreements	Annexation, Reorganization, and Dissolution Plans/Agreements	PERMANENTLY	N/A, File Copy with Co. Supt. & State Archives	BM
Operational Documents & Agreements	Asbestos Reports	PERMANENTLY	N/A	Admin, BM
Operational Documents & Agreements	Board Members and Board Officers List	PERMANENTLY	N/A	BM
Operational Documents & Agreements	Budgets (Proposed & Approved), Budget Hearing Notice, Budget Requests from Departments/Schools, Certificate of Levy, Working Papers	10 Years for Date of Board Approval	Recycle	BM
Operational Documents & Agreements	Census Reports	PERMANENTLY	N/A, File Copy with State Archives	BM
Operational Documents & Agreements	Certificates of Compliance	CFY + 4 Years	Recycle	Admin, BM
Operational Documents & Agreements	Contracts with Vendors, Leases, Bids	6 Years After Termination	Recycle	BM
Operational Documents & Agreements	Co-op Agreements	Life of Agreement + 6 Years	Recycle	BM
Operational Documents & Agreements	Curriculum Guides	Until Superseded or 5 Years, Whichever is Greater	Recycle	Admin
Operational Documents & Agreements	Foundation Aid Reports	10 Years After CFY	Recycle	Admin, BM
Operational Documents & Agreements	Joint Powers Agreements	PERMANENTLY	N/A	BM

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Operational Documents & Agreements	MIS01, MIS02, MIS03, PER02	CFY + 4 Years	Recycle	Admin, BM
Operational Documents & Agreements	Open Records Requests	CFY + 4 Years	Recycle	Admin, BM
Operational Documents & Agreements	Policies	6 Years from Date Rescinded	Recycle	BM
Operational Documents & Agreements	Property Titles, Abstracts, Deeds, Easements	PERMANENTLY	N/A	BM
Operational Documents & Agreements	Pupil Membership Reports	PERMANENTLY	N/A	Admin, BM
Operational Documents & Agreements	Transportation Aid Reports	10 Years After CFY	Recycle	Admin, BM
Operational Documents & Agreements	Transportation Reports for the District	CFY + 4 Years	Recycle	Admin, BM
Operational Documents & Agreements	School Calendars	CFY + 4 Years	Recycle	Admin, BM
Operational Documents & Agreements	School District Status Sheet	CFY + 4 Years	Recycle	Admin, BM
Operational Documents & Agreements	Security Plans/Emergency Response Guides that have Expired	5 Years After Adoption of New Plan	Shred	Admin
Operational Documents & Agreements	Tax Exempt Certification	Until Superseded	Shred	BM
Operational Documents & Agreements	Tuition and Transportation Agreements	CFY + 4 Years	Shred	Admin, BM
Operational Documents & Agreements	Work Study Program Agreements	CFY + 4 Years	Shred	Admin
Payroll Records	941 Federal Tax Form/EFTPS	5 Years After Separation of all Employees on Report	Shred	BM
Payroll Records	1099's	13 Years After CFY	Shred	BM
Payroll Records	Annual Payroll Report (for Annual Financial Report)	PERMANENTLY	N/A	BM
Payroll Records	Child Support Enforcement Report	5 Years After Separation	Shred	BM
Payroll Records	Deductions Register (By Deduction and by Employee)	5 Years After Separation	Shred	BM
Payroll Records	Direct Deposit Information and Authorization Forms	Duration of Employment or Until New Authorization Form are Provided	Shred	BM
Payroll Records	Employee Lifetime Wages Report	6 Years After Separation	Shred	BM
Payroll Records	Garnishments	5 Years After Separation	Shred	BM
Payroll Records	Pay Period Entries for Taxable Reimbursement	5 Years After Date Created	Shred	BM

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Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Payroll Records	Payout of Remaining Leave Upon Separation	5 Years After Separation	Recycle	BM
Payroll Records	Payroll Registers	5 Years After All Employees Listed Have Separated Employment	Recycle	BM
Payroll Records	Payroll Register Totals	5 Years After Created	Shred	BM
Payroll Records	Payroll Schedules	5 Years After Separation of Last Employee Covered by the Schedule (e.g., Last Employee Hired in 1980 Retires in 2015 - Retain 1980 Payroll Schedule Until 2020)	Recycle	BM
Payroll Records	State Income Tax Quarterly Reports	13 Years After CFY	Shred	BM
Payroll Records	Tax Deduction Register	13 Years After CFY	Shred	BM
Payroll Records	Timecards	6 Years After Separation	Recycle	BM
Payroll Records	Timecard Reports	5 Years Created	Shred	BM
Payroll Records	Travel Reimbursement	CFY + 4 Years	Shred	BM
Payroll Records	Union Dues List	5 Years From Date Created	Shred if it Contains Confidential Info; Otherwise Recycle	BM
Payroll Records	Verification of Wages to Employees	6 Years After Separation	Shred	BM
Payroll Records	Voluntary Salary Deduction/Reduction Agreements	5 Years After Separation	Shred	BM
Payroll Records	W-2 Forms	13 Years After CFY	Shred	BM
Payroll Records	W-4 Forms	13 Years After CFY	Shred	BM
Payroll Records	W-9 Forms	13 Years After CFY	Shred	BM
Payroll Records	Wage and Batch Totals Listing Deductions	CFY + 4 Years	Shred	BM
Performance Records	Awards/Honors Records	6 Years After Separation	Shred	BM
Performance Records	Classroom Observations Notes	2 School Years. If Used for Purposes of Nonrenewal - Retain for 6 Years After Separation	Recycle	Employees Supervisor (S or P)
Performance Records	Evaluations (Superintendent and staff)	6 Years After Separation	Shred	BM or HR
Performance Records	Handbook Receipt Verification	6 Years After Separation	Recycle	BM or HR
Performance Records	Improvement Plans	6 Years After Separation	Shred	HR
Performance Records	Nonrenewal Notices	6 Years After Separation	Recycle	BM or HR
Performance Records	Pre-Observation Teacher Forms	2 School Years. If Used for Purposes of Nonrenewal - Retain for 6 Years After Separation	Shred	P or Supervisor
Performance Records	Professional Development Verification	6 Years After Separation	Shred	S
Performance Records	Training Records	6 Years After Separation	Shred	BM or HR

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Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Performance Records	Warning/Write Ups	6 Years After Separation	Shred	HR or Employee's Supervisor
Purchasing & P-Card Records	Requisition Forms; Purchase Orders; Bid Notices; Monthly Detail of Charges; Receipts to Support the Detail of Charges; Vendor Invoices	5 Years After CFY	Shred	BM
Purchasing & P-Card Records	Purchasing Contracts	Any Contract Entered into Should be Retained for the Life of the Contract + 6 Years.	Shred Documents with Account Numbers; Recycle Remaining Documents	BM
Purchasing & P-Card Records	P-Card Holder Employee Agreement	Duration of Employment + 5 Years; If the Agreement is Updated & Signed Annually, the Old Copy May be Discarded	Shred Documents with Account Numbers; Recycle Remaining Documents	BM
School Nutrition Program	Annual USDA Commodity Purchase; Expenditures; Meal Payment Receipts; Reimbursement Claim Reports; Reimbursement Payment Reports; USDA Food Invoices	5 Years from Date Created for All Records Showing Expenditures/Revenues	Shred	BM, S, or School Nutrition Director
School Nutrition Program	Monthly Meal Count Reports (to Confirm Claims); Program Rates; Food Vendor Bids; Free & Reduced Meal Applications	CFY + 3 Years	Shred	BM, S, or School Nutrition Director
Separation & Unemployment Records	COBRA Forms	6 Years After Final Action	Shred	BM
Separation & Unemployment Records	COBRA Payments	6 Years After Final Action	Shred	BM
Separation & Unemployment Records	Early Retirement Agreement	6 Years After Final Payment Made Under Agreement	Shred	BM
Separation & Unemployment Records	Employee Contract Information Form	Duration of Recall Rights for RIF'd Teacher; 1 Year After Updated or Separation	Shred	BM or HR
Separation & Unemployment Records	Exit Checklist	6 Years After Separation	Shred	HR
Separation & Unemployment Records	Exit Interview Form	6 Years After Separation	Shred	HR
Separation & Unemployment Records	Letter of Resignation	6 Years After Separation	Shred	HR or S
Separation & Unemployment Records	Nonrenewal Notices	6 Years After Separation	Recycle	BM or HR

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Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Separation & Unemployment Records	Payout of Remaining Leave Upon Separation	5 Years After Separation	Recycle	BM
Separation & Unemployment Records	PERS Defined Benefit Retirement Membership Application (SFN 2561)	1 Year After Separation	Contact PERS to Ensure Info is on File, Then Shred	BM
Separation & Unemployment Records	PERS Designation of Beneficiary or Group Retirement Plan (SFN 25060)	1 Year After Separation	Contact PERS to Ensure Info is on File, Then Shred	HR
Separation & Unemployment Records	PERS Monthly Report of Contributions	1 Year After Separation	Shred	BM
Separation & Unemployment Records	TFFR Member Action Form (SFN 5098)	1 Year After Separation	Contract TFFR to Ensure Info is on File, Then Shred	BM
Separation & Unemployment Records	TFFR Member Certification (SFN 11732)	1 Year After CFY	Shred	BM
Separation & Unemployment Records	TFFR Monthly Report of Contributions	5 Years After Creation	Contract TFFR to Ensure Info is on File, Then Shred	BM
Separation & Unemployment Records	TFFR Notice of Termination (SFN 17144)	5 Years After Separation	Contract TFFR to Ensure Info is on File, Then Shred	BM
Separation & Unemployment Records	Unemployment Quarterly Reports	5 Years From Date Created	Shred	BM
Special Education Student Records	Student's Name, Address, Phone Number, Grades, Attendance Record, Classes Attended, Grade Level Completed, Year Completed, Career Certifications, and Standardized Test Scores	PERMANENTLY	N/A	Admin
Special Education Student Records	Personally Identifiable Information in Special Education Records -The District must Inform the Parents when Personally Identifiable Information is Collect, Maintained, or Used Under 34 C.F.R. § 300.624 is no Longer Needed to Provide Educational Services to the Child. The Information Must be Destroyed at the Request of the Parents	Accordance with Law	Shred	Admin
Student Records	Activity Trip Permission Slips	1 Calendar Year in Student's Educational Record	Recycle	Admin
Student Records	Attendance Records (Except Special Education Students), Disciplinary Records, Extracurricular Records, Parent Consent Forms, Transfer Notices, Certificates of Immunizations, Honors/Awards, Medical Records not Created by the School, and Accident Reports	Until the Child Turns 21 if the Child Only Attended Elementary School in the District	Shred	Admin
		Until the Child Turns 27 if the Child Attended Middle/High School in the District	Shred	



## RECORDS RETENTION SCHEDULE

Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Student Records	Bullying Reports	6 Years After Student Turned 18 or Graduates from High School - Whichever is Later	Shred	Admin
Student Records	Concussion Documentation, Return to Play Authorization	7 Years After Student's Enrollment or 6 Years After a Student Turns 18 - Whichever is Later	Shred	Supt or AD
Student Records	Discrimination & Harassment Grievance Investigation Materials	At Least 6 Years after Leaving the District	Shred	Grievance Coordinator
Student Records	Expulsion Hearing and all Introduced Evidence for the Hearing	At least 6 Years after the Expelled Student Reaches 18.	Shred	Supt. or Hearing Officer
Student Records	FERPA Directory Information Opt-Out Request - Collect Each Year the Child is a Student	After Graduation, the Most Recent Opt-Out Request Must Remain with the Record for its Duration.	Shred	Admin
Student Records	FERPA Record of Access - The District Must Maintain a Record of Each Request for Access to, and Each Disclosure of Personally Identifiable Information from the Education Records of Each Student, as well as the Names of State and Local Educational Authorities, and Federal Officials and Agencies Listed in §99.31(a)(3).	Maintain this with the Educational Records of the Student for as Long as the Records are Maintained	Shred	Admin
Student Records	Juvenile Court Records, Law Enforcement Records, Records of School Law Enforcement Unit	Destroy when a Student is 18 or no Longer Attends School	Shred	Admin
Student Records	Medicaid Records used for Medicaid Reimbursement	CFY + 5 Years	Shred	Admin
Student Records	Medical Records Created by the School & Counselor's Records	On or After the Student's 21st Birthday or on or After the 10th Anniversary of the Date on Which the Student was Treated	Shred	Admin
Student Records	Permanent Record - Defined as the Student's Name, Address, Phone Number, Grades, Grade Level Completed, Career Certificates, Drop Out Records, and Standardized Test Scores	PERMANENTLY	N/A	Admin
Student Records	PowerSchool Records	PERMANENTLY	N/A	Admin
Student Records	Search of Student and Student's Personal Property Report	Place Report in Student's Educational Record and Destroy 6 Years After Student Turns 18	Shred	Admin
Student Records	Suspension of Student (Either in School or Dismissal from Classes, Buildings, or Grounds)	Place Report in Student's Educational Record and Destroy 6 Years After Student Turns 18	Shred	Admin

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## RECORDS RETENTION SCHEDULE

Type of Report	Description	Retention Period	Destruction/Preservation Method	Record Admin
Training Records	New Board Member Training Verification	Term of Office + 6 Years	Recycle	BM
Training Records	Board Member Service Award Tracking	1 Year After Awarded	Offer to Board Member, Then Recycle	BM

1-20-2020