

Records Management

The District records officer shall have the responsibility for the safekeeping of all records according to the retention schedule cited below. The district records officer shall have the authority to dispose of materials after the recommended retention period.

Official public records have a statutory minimum retention of 6 years. The retention period for office files and memoranda is based on operational requirements for each office. Whenever applicable, the retention period starts with the "cut-off." "Cut-off" is a term used to indicate files or records may be terminated on a predetermined date. "Cut-off" prevents current records from attaining unmanageable size and facilitates the filing of new records. Calendar year records may be "cut-off" on December 31, and a new file established on January 1; all fiscal year records can be "cut-off" only upon the completion of an action or event, such as termination of contract, final payment of a contract, termination of employment, etc. Regardless of the duration of the retention period, records series should be kept in office files after "cut-off" only as long as is necessary to satisfy (1) active reference, (2) audit, when required, and (3) other operational requirements. Once these three factors have been satisfied, the records should be transferred to a records center for the remainder of the retention period.

The retention period shall be as follows:

Food Services

Cafeteria receipt books	6 years
Daily lunch and milk count report	3 years
Free or reduced price lunch applications.....	3 years
Meal ticket log	3 years
Purchase orders.....	6 years
Reimbursement claims.....	6 years
Revenue and expenditure ledger	6 years
Time cards	6 years

Health Office

Accident injury report.....	5 years after child's 21st birthday
Medication request.....	5 years
Student health card	Until graduation

Maintenance

Engineering and architectural drawings	As long as district retains property
Maintenance folder on building	6 years
Work order request	6 years

Mileage claim form	6 years
Vandalism report	3 years
Laundry checklist	6 years
Boiler vessel record.....	Until boiler is disposed of
Budget request.....	2 years
Rental of school facilities.....	3 years

Transportation

Bus driver personnel folder	6 years
Bus fuel reports	2 years
Bus schedules.....	4 years
Employee time sheet.....	2 years
Bus time sheet	4 years
Transportation reports.....	3 years
Purchase orders.....	6 years
Accident reports	3 years
Transportation requests	6 years

Accounting Services

Canceled checks.....	6 years
Check register.....	6 years
Voucher forms.....	6 years (used as claims and supporting invoices)
Consultant contracts	6 years
Purchase order.....	6 years
Warrant registers.....	6 years
Record of part-time students.....	Until after audit
Classroom count report.....	Until after audit
Records supporting ESEA Title I & Title III claims.....	5 years
Textbook and library book inventories.....	Useful life of each item
Cash receipts transmittal of district receipts.....	6 years
Monthly transmittal of district receipts	3 years
District Invoice.....	6 years
Trial balances.....	3 years
Receipt books	6 years
County Treasurer Financial Reports	6 years
State apportionment.....	6 years
Banking records	6 years
State Auditor's Reports	5 years
General ledger	6 years
Deposit slips.....	Until after audit

Personnel Services

Employee file.....	6 years
Employment interview forms	2 years
Employment requisition	2 years
Letters of resignation.....	6 years
Absence record	6 years
Employee history card.....	6 years (hired)
application for employment	6 years (hired)
	2 years (nonhired)
Letters of recommendation.....	Termination plus
	6 years
Employee contracts.....	6 years
Professional credit application.....	6 years
Title IX and affirmative action surveys.....	6 years

District Payroll

Employee record	6 years after
	termination
Personnel pay history record.....	Permanent
Personnel action form	6 years after
	termination
Time cards	Until after audit
Payroll work report	6 years
Teacher sub report.....	6 years
Payroll warrant register	6 years
Warrant request form	6 years
Tax sheltered agreements.....	4 years after
	expiration
Jury or military service agreements.....	6 years
Garnishments.....	6 years
Retirement forms.....	6 years
Labor & Industry quarterly report.....	6 years
Medical insurance listings	6 years
Payroll deductions.....	Until termination
Labor & Industries accident claims.....	Permanent
Federal tax returns	4 years

Budget Services

Final budget	Permanent
Annual report of school funds.....	6 years
Monthly financial reports to board	Permanent
Budget status report.....	2 years

Purchasing

Bids and formal quotes.....	6 years
-----------------------------	---------

Purchasing requisition	3 years
Purchase orders	6 years
Inventory list of district property	6 years after
.....	superseded

District

Copies of board minutes and resolutions	Permanent
Verbatim transcripts of meetings	6 years

Associated Student Body

Audits	5 years
Banking records	6 years
Minutes of meetings	Permanent
Purchase authorizations	6 years
Receipts	6 years
Invoices	6 years
Vouchers	6 years
General ledger	6 years
Warrants	6 years
Budgets	Permanent

Student Records

Student permanent record	Permanent
Cumulative record	5 years after graduation or withdrawal from high school
Confidential reports and records	5 years after graduation or withdrawal from high school
Special services records	5 years after graduation or service has been terminated
Student discipline records	2 years

Teacher Records

Elementary teacher grade books	3 years
Secondary teacher grade books	5 years after graduation
Lesson plan books	1 year
Faculty handbook	Until superseded

Individual Schools

Attendance card	3 years
-----------------------	---------

Daily attendance report	Until after audit
Field trip authorization (parent)	1 year
Use of private vehicles	1 year

Records Management

The records of a school district are public and remain the property of the district. A record retention schedule, which is an abstraction from the Records Management Manual for School Districts in the State of Washington, is included in this manual. A complete copy of the manual is available from the Division of Archives and Records Management, State of Washington, Olympia 98504

Implemented:

June, 1991

North Thurston School District
Board of Directors