

AUG 24 2015

STATE AND LOCAL
GOVERNMENT RECORDS

Fairport Harbor Exempted Village School District Schedule of Records Retention and Disposition Form RC-2

To: Ohio Historical Society
State Archives
Local Government Records Program
1982 Velma Avenue
Columbus, OH 43211-2497

Political Subdivision:	Fairport Harbor Exempted Village School District	Contact Person:	Lewis Galante
Address:	329 Vine Street	Title:	Chief Financial Officer
City, State, Zip:	Fairport Harbor, OH 44077	Phone:	440-354-5400
County:	Lake		

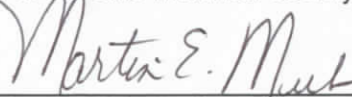
I hereby certify that our Records Commission met in an open meeting, as required by R.C. 149.41, and passed the retention schedules contained on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these record(s) series from being destroyed, transferred, or otherwise disposed of in violation of this schedule and that no record will be knowingly disposed of which pertains to any pending case, claim, action or request. Further, any microfilm replacing a record listed on this schedule will conform to ANSI standards. This RC-2 was approved on August 11, 2015 as reflected by the minutes kept by this commission.

 8/11/15

Records Commission Chairman Date

 9/3/15

For the Ohio Historical Society Date

 9-21-15

For the Ohio Auditor of State Date

* After End of Fiscal Year
** Provided Audited
*** May be Stored Electronically after Five Years

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP
BOARD RECORDS				
BOE01	Minutes	Permanent	Paper & Electronic	RC-3 Required
BOE02	Audio Tapes	2 Years	Tapes	
BOE03	Blue Prints, Plans, Maps	Permanent	Paper & Electronic	RC-3 Required
BOE04	Deeds, Easements, Leases	Permanent	Paper & Electronic	
BOE05	Board Policy Books and Other Adopted Policies	1 year after superseded	Paper & Electronic	
BOE06	Administrative Regulations	1 year after superseded	Paper & Electronic	
BOE07	Court Decisions	Permanent	Paper & Electronic	RC-3 Required
BOE08	Claims and Litigation	Permanent	Paper & Electronic	RC-3 Required
BOE09	Elections	10 years	Paper & Electronic	RC-3 Required
BOE10	Record Disposal Forms (RC-3)	10 years	Paper & Electronic	
BOE11	Bargaining Agreements	10 years after expiration	Paper & Electronic	
BOE12	Budget Policy Files	5 years	Paper & Electronic	
BOE13	Workers' Compensation Claims	10 years after financial payment made	Paper	
BOE14	Bank Depository Agreements	4 years after completion	Paper	
BOE15	Organization Reports	2 years**	Paper & Electronic	
BOE16	Board Meeting Notes	1 year	Paper	
BOE17	Agendas	1 calendar year**	Paper & Electronic	
BOE18	Adopted Courses of Study	Until superseded	Paper & Electronic	
BOE19	Adopted Special Education Programs	Until superseded	Paper & Electronic	
BOE20	Adopted Special Programs	Until superseded	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.

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	
BOE21	Active and Inactive Employee Files (Employment Applications, Resumes, Evaluations, Personnel Actions, Transcripts and any other documents which become part of the file)	Permanent	Paper		
BOE22	Civil Rights, Civil Services, and Disciplinary Reports	Permanent***	Paper & Electronic		
BOE23	Retirement Letters	Permanent***	Paper & Electronic		
BOE24	Substitute Records	25 years	Paper & Electronic		
BOE25	Employee Contracts	4 years after termination from employment	Paper		
BOE26	Professional Conference Applications	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. 117.25 O.R.C.	
BOE27	Irregular Employee Contract (Substitutes, etc.)	4 years after contract expires	Paper		
BOE28	Unemployment Claims and Records	5 years	Paper		
BOE29	Applications (Not Hired)	2 years**	Electronic		
BOE30	Schedules of Employees	Fiscal year plus 2 years	Paper & Electronic		
BOE31	Student Helper Applications	2 years	Paper		
BOE32	I-9 Immigration Verification Forms	Termination of employment plus 1 year	Paper		
BOE33	Job Descriptions	Until superseded or obsolete	Paper & Electronic		
STUDENT RECORDS					
SR01	Student Record Folders	Permanent***	Paper & Electronic		
SR02	Enrollment/Withdrawal	Permanent***	Paper & Electronic		
SR03	Grades/Transcripts	Permanent***	Paper & Electronic		
SR04	Activities Record	Permanent***	Paper & Electronic		
SR05	Attendance Records	Permanent***	Paper & Electronic		
SR06	Individual Test Results (Standardized, Competency/Proficiency, Aptitude)	Permanent***	Paper & Electronic		
SR07	Intervention Records	Permanent***	Paper & Electronic		

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP
SR08	Foreign Exchange Records	Permanent***	Paper & Electronic	
SR09	Suspension/Expulsions	Permanent***	Paper & Electronic	
SR10	Home Schooled Student Records	Permanent***	Paper & Electronic	
SR11	Office Record Card (K-9)	Permanent***	Paper & Electronic	
SR12	Health/Medical Records (Visual Screening, Hearing Screening, Immunization Records)	7 years after graduation	Paper & Electronic	
SR13	Discipline Records (Letters to Parents, Office Discipline)	1 year after student leaves school	Paper & Electronic	
SR14	Psychological Records (Restricted)	Permanent***	Paper & Electronic	
SR15	Child Abuse/Neglect (Referral Letters)	Through graduation	Paper	
SR16	Teacher Grade Books/Records	3 years**	Paper & Electronic	
SR17	Pre-school Screening Profiles	3 years	Paper & Electronic	
SR18	Age and Schooling Records (Work Permits)	3 years	Paper	
SR19	Accident Reports	5 years provided no action pending	Paper & Electronic	
SR20	Individual Education Plan (IEP)	Permanent	Paper & Electronic	
SR21	Free/Reduced Price Lunch Application	4 years	Paper	
SR22	Emergency Information	Until superseded	Paper & Electronic	
BUILDING RECORDS				
BLD01	Tornado and Fire Drill Records	1 year*	Paper & Electronic	
BLD02	Building Health Inspections	2 years*	Paper	
BLD03	Student Activity Records (Pay-in Forms, Pay-Out Forms, Account Forms/District, Budget Forms, Requisitions, Purchase Orders, Ticket Sale Reports)	2 years**	Paper & Electronic	
BLD04	Receipts/Deposit Slips	4 years**	Paper & Electronic	
BLD05	Textbook Inventories	Until superseded	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. 117.25 O.R.C.

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP
BLD06	Supplies Inventory	Until superseded	Paper & Electronic	
BLD07	Student Handbooks	Until superseded	Paper & Electronic	
ADMINISTRATIVE RECORDS				
ADM01	School Calendars	5 years	Paper & Electronic	
ADM02	Repair, Installation and Maintenance Records	4 years**	Paper & Electronic	
ADM03	Prevailing Wage Records	4 years**	Paper & Electronic	
ADM04	Rental Information (Use of Facilities)	4 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. 117.20 O.R.C.
ADM05	Work Orders	4 years**	Paper & Electronic	
ADM06	Environmental Reports and Data (asbestos, etc.)	4 years**	Paper & Electronic	
ADM07	Vandalism Reports	4 years**	Paper & Electronic	
ADM08	Student Activity Purpose Clauses	4 years**	Paper & Electronic	
ADM09	Sales Potential Forms (Student Activities)	4 years**	Paper & Electronic	
ADM10	Bids and Specifications (Unsuccessful)	1 year**	Paper	
ADM11	Bids and Specifications (Successful)	4 years after completion of project**	Paper	
ADM12	Contractor Files (Resolutions, Additions, Drawings, etc.)	Until project complete if no action pending**	Paper	
ADM13	Preventive Maintenance Reports	Fiscal year plus 2 years	Paper & Electronic	
ADM14	Warranty/Guarantee	Life/warrant of equipment	Paper	
ADM15	Plant and Equipment Inventory	Until superseded**	Paper & Electronic	
ADM16	Supplies Inventory	Until superseded**	Paper & Electronic	
ADM17	Accident Reports	3 years provided no action pending	Paper & Electronic	
SPECIAL EDUCATION RECORDS				
SPED01	Special Education Tutoring Reports	10 years	Paper & Electronic	

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP
SPED02	Psychological Records (Restricted)	Permanent***	Paper & Electronic	
FOOD SERVICE RECORDS				
FD01	Lunchroom License	1 year after expiration	Paper	
FINANCIAL RECORDS				
FIN01	Annual Financial Reports (Appropriation Ledgers, Budget Ledgers, Revenue Ledgers, Vendor Listing, Check Register, Purchase Order Listing, Invoice List, Account Reports, Financial Summary, Detail Reports)	5 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. 117.20 O.R.C.
FIN02	Activity Fund Cash Journal and Ledger	5 years**	Electronic	
FIN03	Bond Register	20 years after issue expires	Paper	
FIN04	Securities	Permanent***	Paper	
FIN05	Investment Ledger	5 years***	Paper & Electronic	
FIN06	Foundation Distribution	5 years***	Paper & Electronic	
FIN07	Tax Settlements (Semi-Annual) and Advances	5 years***	Paper & Electronic	
FIN08	Budgets (Annual)	5 years***	Paper & Electronic	
FIN09	Insurance Policies	15 years after expiration provided all claims settled	Paper & Electronic	
FIN10	Contracts (other than employee contracts)	15 years after expiration	Paper	
FIN11	Bonds and Coupons	Until redeemed**	Paper	
FIN12	Accounts Payable Ledgers	5 years**	Electronic	
FIN13	Accounts Receivable Ledgers	5 years**	Electronic	
FIN14	Budget Work Papers	5 years**	Paper	
FIN15	Vouchers, Invoices, including Travel/Expense Reports	5 years**	Paper & Electronic	
FIN16	Purchase Orders	5 years**	Electronic	
FIN17	State Program Files (Aux. Services, DPPF, Excess Lottery, Data Processing, Public/Private Grants, etc.)	10 years**	Paper & Electronic	
FIN18	Federal Program Files (Title I, II, III, IV-B, IV-C & VI-B; Chapter 1, 2; Drug Free, etc.)	10 years**	Paper & Electronic	
FIN19	Tax Anticipation Notes (Records borrowing against future tax collections)	10 years**	Paper	
FIN20	State Reimbursement Settlement Sheets	5 years**	Paper	

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP
FIN21	Employee Bonds, Board Member Bonds	5 years	Paper	
FIN22	Certificate of Estimated Resources	15 years after expiration	Paper	
FIN23	Appropriation Resolutions	5 years	Paper & Electronic	
FIN24	Tax Appointments (Semi-annual)	5 years	Paper & Electronic	
FIN25	Canceled Checks and Bank Settlement	4 years**	Paper & Electronic	
FIN26	Publication Notice	4 years**	Paper & Electronic	Audited means the years encompassed by the records
FIN27	Tuition Fees and Payments	4 years**	Paper & Electronic	have been audited by the Auditor of State and the
FIN28	School Finance Monthly Statements	4 years**	Paper & Electronic	audit report has been released pursuant to
FIN29	Investment Records (Individual Record of Investments, Bank Confirmation, Wire Transfers, Copy of CD, etc.)	4 years**	Paper & Electronic	Sec. 117.20 O.R.C.
FIN30	State Sales Tax Reports	4 years**	Paper	
FIN31	Student Activity Fund (Pay-ins, Pay-outs, Receipts/Deposits, Reports)	4 years**	Paper & Electronic	
FIN32	Check Registers	4 years**	Electronic	
FIN33	Deposit Slips/Cash Proofs	4 years**	Paper	
FIN34	Bids and Specifications (Unsuccessful)	1 year**	Paper	
FIN35	Bids and Specifications (Successful)	4 years after completion of project	Paper	
FIN36	Receipt Books	4 years**	Paper	
FIN37	Extra Trip Records	4 years**	Paper	
FIN38	Monthly Financial Reports	4 years**	Electronic	
FIN39	Service Contracts	4 years**	Paper	
FIN40	State Subsidy Reports (Application for Driver Education, Student Transportation, Special Education, etc.)	3 years**	Paper & Electronic	
FIN41	Delivery/Packing Slips	1 year**	Paper	
FIN42	Requisitions	1 year*	Paper	
PAYROLL RECORDS				
PAY01	Payroll Ledgers (Bi-Weekly Payroll Reports, Quarterly Payroll Reports)	Permanent***	Paper & Electronic	
PAY02	Earnings Registers (By Staff Member, By Calendar Year)	Permanent***	Paper & Electronic	

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PAY03	Monthly Payroll Reports (Leave Usage and Accumulation, Retirement Service, etc.)	Permanent***	Paper & Electronic	
PAY04	Bureau of Employment Service Quarterly Reports	7 years	Paper	
PAY05	W-2's, W-4's (Employer Copy)	6 years and current**	Paper & Electronic	
PAY06	Federal Income Tax (Quarterly/Annual)	6 years and current**	Electronic	
PAY07	Ohio Income Tax (Monthly/Annual)	6 years and current**	Electronic	
PAY08	City Income Tax (Monthly/Annual)	6 years and current**	Electronic	
PAY09	School Income Tax (Monthly/Annual)	6 years and current**	Electronic	
PAY10	Payroll Reports (Reports Used for Each Payroll – Computer Generated)	4 years**	Electronic	
PAY11	Payroll Update Listing	4 years**	Electronic	
PAY12	Payroll Calculations	4 years**	Electronic	
PAY13	State Teachers System and School Employees Retirement System Waivers	Permanent***	Paper & Electronic	
PAY14	State Employees Retirement System Reports	4 years**	Paper	
PAY15	State Teachers Retirement System Reports	4 years**	Paper	
PAY16	Annuity Reports	4 years**	Paper	
PAY17	Benefit Folders/Reports	4 years**	Paper	
PAY18	Employee Request and/or Authorization for Leave Forms (Sick, Vacation, Personal or Other Leave)	4 years**	Paper & Electronic	
PAY19	Deduction Reports (Voluntary Payroll Deductions)	4 years**	Paper	
PAY20	Employee Vacation/Sick Leave Records	4 years**	Paper & Electronic	
PAY21	Time Sheets	6 years**	Paper	
PAY22	Overtime Authorization	6 years**	Paper	
PAY23	Employee Insurance Bills (Medical, Dental, Life)	4 years**	Paper & Electronic	
PAY24	Paycheck Register	4 years**	Electronic	
PAY25	Payroll Bank Statement	4 years**	Paper & Electronic	
PAY26	Deduction Authorization	Until superseded or employee terminated	Paper	
REPORTS				
RPT01	State Audit Reports	5 years	Paper & Electronic	

Audited means the year's data has been audited by the Auditor of State and no audit report has been released pursuant to Sec. 117.26 Ohio.

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP
RPT02	School Finance (SF) Reports – Annual	5 years	Paper & Electronic	
RPT03	Special Education (SE) Reports – Annual	7 years	Paper & Electronic	
RPT04	Ohio Common Core Data (OCCD) Reports	5 years	Paper & Electronic	
RPT05	Ohio Department of Education Reports	5 years	Paper & Electronic	
RPT06	Civil Rights Reports	Permanent***	Paper & Electronic	RC-3 Required
RPT07	Title IX Reports	10 years	Paper & Electronic	RC-3 Required
RPT08	SM-1 & SM-2 (Annual and Quarterly)	10 years	Paper & Electronic	RC-3 Required
RPT09	State Minimum Standards	10 years	Paper & Electronic	RC-3 Required
RPT10	Personnel State Reports (SF-1, CS-1)	4 years**	Paper & Electronic	
RPT11	Workers' Comp Wage Reports (County Auditor)	5 years	Paper & Electronic	
RPT12	Bank Balance Certification (County Auditor)	5 years	Paper & Electronic	
OTHER RECORDS				
OTR01	Personnel Directory	10 years	Paper & Electronic	
OTR02	Employment Record (By Grade and Building)	Permanent***	Paper & Electronic	
OTR03	Building, Boiler, Maintenance Reports	2 years*	Paper & Electronic	
OTR04	Employee Handbooks	Until superseded	Paper & Electronic	
OTR05	Directives, Standards, Laws for Local, State and Federal Governmental Agencies	Until superseded	Paper & Electronic	
OTR06	Email, Social Media and Texts	ORC / Statute	Electronic	

This schedule is in compliance with Fairport Harbor Exempted Village School District policy BCE adopted 12/17/07 and supersedes any prior Form RC-2 approved by the Fairport Harbor Exempted Village School District Board of Education, Ohio Historical Society and Ohio Auditor of State.

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