

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION**  
**ACCOUNTING RECORDS – BUILDINGS AND CO DEPARTMENTS**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
4301	Student Activity Pay-In Forms Pay-Out Forms Account Forms/Dist. Budget Forms Req/Purchase Orders Purpose Clauses Sales Potential Projections Ticket Sales Reports	Two Years **
4302	Receipts/Deposit Slips	Four Years **
4303	Budget/Appropriation Records	Four Years **
4304	Requisitions/Purchase Orders	Ten Years **

\*\* Provided audited

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****BUILDING RECORDS - OTHER**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
4202	Tornado and Fire Drill Records	One Year *
4203	Building Health Inspections	Two Year *
4401	Textbook Inventories	Until Superseded
4402	Supplies Inventories	Until Superseded
4403	Student Handbooks	Until Superseded
5201	School Calendars	Five Years
8209	ODE (Ohio Department of Education) Reports	Five Years
9403	Directives, Standards, Laws from Local, State, and Federal Governmental Agencies	Until Superseded

\* After end of fiscal year

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****BUSINESS OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
1102	Blueprints, Plans, Maps	Permanent
1103	Deeds, Easements, Lease, Abstracts	Permanent
2105	Civil Rights Reports	Permanent***
5301	Repair, Installation & Maintenance Records	Four Years**
5302	Prevailing Wage Records	Four Years**
5303	Rental Information (Use of Facilities)	Four Years**
5304	Work Orders	Four Years**
5305	Environmental Reports and Data	Four Years**
5306	Vandalism Reports	Four Years**
5309	Bids and Specifications (Unsuccessful)	One Year **
5310	Bids and Specifications (Successful)	Four Years after Completion of Proj.
5311	Contractor Files (Resolutions, additions, drawings, etc.)	Until Project Comp., if no action pending**
5401	Preventative Maintenance Reports	Fiscal Year Plus Two Years
5402	Warranty/Guarantee	Life/Warranty of Equipment
5405	Supplies Inventory	Until Superseded**
5442	Vehicle Registration	Life of Vehicle
5443	Vehicle License	Until Termination plus One Year
6205	Insurance Policies	15 Years after Expiration Provided All Claims Settled
6206	Contracts	15 Years after Expiration

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****BUSINESS OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
6211	Purchase Orders	Ten Years**
6311	Bids and Specifications (Unsuccessful)	One Year**
6312	Bids and Specifications (Successful)	Four Years after project completion
6319	Delivery/Packing Slips	One Year**
9203	Building, Boiler, Maintenance Reports	Two Years**
9403	Directives, Standards, Laws from Local, State and Federal Governmental Agencies	Until Superseded

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\*\*\* Hard copy maintained for five years after  
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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION**  
**CURRICULUM AND FEDERAL GRANTS OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
1401	Adopted Courses of Study	Until Superseded
1403	Adopted Special Programs	Until Superseded
5404	Textbook/Workbook Inventory	Until Superseded**
6212	State Program Files Aux Svc, DPPF, Adult Voc, Excess Lottery, Data Processing Public/Private Grants, etc.	Ten Years**
6213	Federal Program Files Title I, II, III, IV-B, IV-C & VI-B; Chapter 1, 2, Drug Free, etc.	Ten Years**
9403	Directives, Standards, Laws from Local, State & Federal Governmental Agencies	Until Superseded

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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****FOOD SERVICES OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
5561	Food Service Records: Menus Food Production, Milk Sold, Students Served	Four Years**
5562	Lunchroom Records Cash Register Tapes Cashier's Daily Reports	Four Years**
5563	Lunchroom Reports Free & Reduced	Four Years**
5564	Inventories	Until Superseded**
5565	Lunchroom License	One Year after Expiration
6211	Vouchers, Invoices, and Purchase Orders	Ten Years**
9403	Directives, Standards, Laws from Local, State, and Federal Governmental Agencies	Until Superseded

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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****HUMAN RESOURCES OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
Employee files include employment applications, resumes, contracts/salary notices, evaluations, personnel actions, absence certification, transcripts, and any other documents which became part of the file.		
2101	Certificated Active Employees	Permanent
2102	Classified Active Employees	Permanent
2103	Certificated Inactive Employees	Permanent***
2104	Classified Inactive Employees	Permanent***
2105	Civil Rights, Civil Service, and Disciplinary Reports	Permanent***
2107	Retirement Letters	Permanent***
2108	Substitute Records	25 Years
2301	Employee Contracts and Salary Notices	Four Years after Termination of Emp.
2302	Professional Conferences Applications	Two Years**
2303	Irregular Employee Contracts (substitutes, etc)	Four Years after Contract Expires
2304	Unemployment Claims	Five Years
2305	Unemployment Records	Five Years
2306	Applications (not hired)	Two Years**
2307	Schedule of Employees	Fiscal Year plus Two Years
2308	Student Helper Applications	Two Years
2309	Teacher Personnel Reports (internal)	Fiscal Year plus One Year
2310	I-9 Immigration Verification Forms	Termination of Employment plus One Year
2401	Job Descriptions	Until Superseded
6217	Unemployment Claims	Five Years

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****HUMAN RESOURCES OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
7314	Employee Request and/or Authorization for Leave (Sick, Vacation, Personal, Other)	Four Years**
8301	Personnel State Reports Currently SF-1, CS-1	Four Years**
9403	Directives, Standards, Laws from Local, State, and Federal Governmental Agencies	Until Superseded
9404	Attendance Records	Until Superseded

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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****PAYROLL AND BENEFITS OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
7001	Payroll Ledgers Bi-Weekly Payroll Reports Quarterly Payroll Reports Payroll Reports	Permanent***
7102	Earnings Registers by Staff Member by Calendar Year	Permanent***
7103	Monthly Payroll Reports (leave usage and accumulation, retirement service, etc.)	Permanent***
7201	Bureau of Employment Services Quarterly Reports	Seven Years
7301	W-2 and W-4 Employer Copy	Six Years & Current**
7302	Federal Income Tax Quarterly/Annual)	Six Years & Current**
7303	Ohio Income Tax (Monthly/Annual)	Six Years and Current**
7304	City Income Tax (Monthly/Annual)	Six Years & Current**
7305	School Income Tax (Monthly/Annual)	Six Years & Current**
7306	Payroll Reports (All reports used for each payroll – computer generated – EXCEPT those listed under 7001, 7102 and 7103 above	Four Years**
7307	Payroll Update Listings	Four Years**
7308	Payroll Calculations	Four Years**
7309	STRS and SERS Waivers	Permanent***
7310	SERS Reports	Four Years**
7311	STRS Reports	Four Years**
7312	Annuity Reports	Four Years**
7313	Benefit Folder/Report	Four Years**
7314	Employee Request and/or Authorization (Sick, Vacation, Personal, or Other Leave)	Four Years**

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****PAYROLL AND BENEFITS OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
7315	Deduction Reports Voluntary Payroll Deductions	Four Years**
7316	Employee Vacation/Sick Leave Records	Four Years**
7317	Time Sheets	Six Years
7318	Overtime Authorization	Six Years
7319	Employee Insurance, Bills, Medical, Dental, Vision, Life	Four Years**
7323	Paycheck Register	Four Years**
7401	Deduction Authorization	Until Superseded or Employee
Terminated		
9403	Directives, Standards, Laws from Local, State, and Federal Governmental Agencies	Until Superseded
9404	Attendance Records	Until Superseded

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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****SPECIAL EDUCATION OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
1402	Adopted Special Education Programs	Until Superseded
8205	Special Education Reports	Seven Years
5221	Special Education Tutoring Reports	Ten Years
5222	Individual Educational Plan (IEP)	Permanent ***
5223	Psychological Records Restricted	Permanent***
6212	State Grants Special Education Related	Ten Years**
6213	Federal Grants Special Education Related	Ten Years**
9403	Directives, Standards, Laws from Local, State, and Federal Governmental Agencies	Until Superseded

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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION**

**STUDENT RECORDS**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
3101	Student Record Folders Enrollment/Withdrawal Information Grades/Transcripts Activities Records Attendance Records Individual Test Results Intervention Records Foreign Exchange Records Suspensions/Expulsions Home Schooled Student Records	Permanent***
3102	Office Record Card (K-9)	Permanent***
3103	Cosmetology Records	Permanent***
3201	Health/Medical Records Visual Screening Hearing Screening Immunization Records	7 Years after Graduation
3202	Discipline Records Letters to Parents Office Discipline	One Year after Student Leaves School
3203	Psychological Records (Restricted)	Permanent***
3204	Child Abuse/Neglect Referral Letters	Through Graduation
3301	Teacher Grade Book/Records	Three Years*
3302	Pre-School Screening Profile	Three Years
3303	Work Permits	Three Years
3304	Accident Reports	Five Years providing no action pending
3305	IEP	Permanent***
3306	Free/Reduced Lunch Application	Four Years
3401	Emergency Information	Until Superseded
9403	Directives, Standards, Laws from Local, State, and Federal Government Agencies	Until Superseded

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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****SUPERINTENDENT'S SECRETARY SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
1104	Board Policy Books and Other Adopted Policies	One Year after Superseded
1105	Administrative Regulations	One Year after Superseded
1403	Adopted Special Programs	Until Superseded
5201	School Calendars	Five Years
8207	Ohio Common Core Data (OCCD) Reports	Five Years
8209	Ohio Department of Education (ODE) Reports	Five Years
8211	Civil Rights Reports	Permanent***
8212	Title IX Reports	Ten Years
8214	State Minimum Standards	Ten Years
9101	Personnel Directory	Permanent***
9102	Enrollment Record (by Grade and Building)	Permanent***
9402	Employee Handbooks	Until Superseded
9403	Directives, Standards, Laws from Local, State and Federal Governmental Agencies	Until Superseded

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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****TREASURER'S OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
1101	Minutes	Permanent
1101.1	Audio Tapes	Two years
1106	Court Decisions	Permanent
1107	Claims and Litigation	Permanent
1201	Elections	10 Years
1202	Records Commission Records Disposal RC-3	10 Years
1203	Bargaining Agreements	10 Years after Expiration
1204	Budget Policy Files	5 Years
1301	Worker's Compensation Claims	10 Years after Fin. Payment Made
1302	Bank Depository Agreements	Four Years after Completion
1303	Organization Reports	Two Years**
1304	Board Meeting Notices	One Year
1305	Agendas	One Calendar Year**
5307	Student Activity Purpose Clauses	Four Years**
5308	Sales Potential Forms (Student Activity)	Four Years**
5403	Plant and Equipment Inventory	Until Superseded**
6101	Annual Financials Appropriation Ledgers Budget Ledgers Revenue Journals Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports Financial Summary Detail Reports	Five Years**
6102	Activity Fund Cash Journal & Ledger	Five Years**

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****TREASURER'S OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
6103	Bond Register	20 Years after Issue Expires
6104	Securities	Permanent***
6201	Investment Ledger	Five Years**
6202	Foundation Distribution	Five Years**
6203	Tax Settlements (semi-annual) and Advances	Five Years**
6204	Budgets (Annual)	Five Years**
6205	Insurance Policies	15 Years after Expiration Provided All Claims Settled
6206	Contracts	15 Years after Expiration
6207	Bonds and Coupons	Until Redeemed**
6208	Accounts Payable Ledgers	Five Years**
6209	Accounts Receivable Ledgers	Five Years**
6210	Budget Work Papers	Five Years**
6211	Vouchers, Invoices, and Purchase Orders	Ten Years**
6212	State Program Files Aux Svc, DPPF, Adult Voc, Excess Lottery, Data Processing Public/Private Grants, etc.	Ten Years**
6213	Federal Program Files Title I, II, III, IV-B, IV-C & VI-B; Chapter 1, 2, Drug Free, etc.	Ten Years**
6214	Travel Expense Vouchers	Ten Years**
6215	Tax Anticipation Notes	Ten Years**
6216	State Reimbursement Settlement Sheets	Five Years**
6218	Employee Bonds, Board Member Bonds	Five Years
6219	Certificate of Estimated Resources	15 Years after Exp.

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****TREASURER'S OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
6220	Appropriation Resolutions	Five Years
6222	Tax Apportionments (semi-annual)	Five Years
6301	Cancelled Checks & Bank Statements	Four Years**
6302	Publication Notice	Four Years**
6303	Tuition: Fees and Payments	Four Years**
6304	School Finance (S.F.) Monthly Statement	Four Years**
6305	Investment Reports	Four Years**
6306	Travel Expense Reports Board & Employee	Ten Years**
6307	State Sales Tax Reports	Four Years**
6308	Student Activity Fund (Pay-Ins, Pay-Outs, Receipts/ Deposits, Cancelled Checks, Reports)	Four Years**
6309	Check Registers	Four Years**
6310	Deposit Slips/Cash Proofs	Four Years**
6313	Receipt Books	Four Years**
6314	Extra Trip Records	Four Years**
6315	Monthly Financial Reports	Four Years**
6316	Accounting Data	Four Years**
6317	Service Contracts	Four Years**
6318	State Subsidy Requests Applications for driver education, pupil transportation, special education, etc.	Three Years***
6401	Requisitions	One Year**
7324	Payroll Bank Statement	Four Years**
8201	State Audit Reports	Five Years



**SCHEDULE OF RECORDS RETENTION AND DISPOSITION**

**TREASURER'S OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
8202	#59 & #659 or #4502 Reports	Five Years
8203	#25 & #625 Reports	Five Years
8204	School Finance (S.F.) Reports	Five Years
8213	SM-1 & SM-2 Reports Quarterly and Annual	10 Years
8302	County Auditor: Annual Wages for Workers Compensation	Five Years
8303	County Auditor: Bank Balance Certification	Five Years
9403	Directives, Standards, Laws from Local, State & Federal Governmental Agencies	Until Superseded
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**SCHEDULE OF RECORDS RETENTION AND DISPOSITION****VOCATIONAL OFFICE SCHEDULE**

<u>SCHEDULE #</u>	<u>RECORD SERIES TITLE</u>	<u>RETENTION PERIOD</u>
3103	Cosmetology Records	Permanent***
8206	Vocation Education Reports	Five Years
9403	Directives, Standards, Laws from Local, State, and Federal Governmental Agencies	Until Superseded

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