Ohio History Connection
State Archives of Ohio
Local Government Records Program
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OHIO HISTORY CONNECTION

SEPTEMBER 19 2025

STATE AND LOCAL GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2) – Part 1

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

Section A: Local Government Unit

Jackson Milton Local School District			
(Local Government Entity)		(Unit)	
Kathy Jo Beverly	Kathy Jo Beverly	Treasurer	9/18/25
(Signature of Responsible Official)	(Name)	(Title)	(Date)

Section B: Records Commission

Records Commission

13910 Mahoning Ave	North Jackson	44451	Mahoning
(Address)	(City)	(Zip Code)	(County)

(Telephone Number)

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

Kathyjo.beverly@jmlocal.com

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.

Laura E. Bacon — 9/18/25

Records Commission Chair Signature — Date

Section C: Ohio History Connection - State Archives

Caroline Somerson Digitally signed by Caroline Somerson Date: 2025.09.19 08:22:40 -04'00'	Local Government Records Archivist	9/19/2025
Signature	Title	Date

Section D: Auditor of State

Martin E. Meeks Digitally signed by Martin E. Meeks Date: 2025.09.24 10:13:41 -04'00'	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.

School District Suggested Records Retention Schedule

This schedule lists records commonly created by school districts, educational service centers, and career technical schools. The retention periods specified herein are either required by statute or have been determined by best practice. Local Records Commissions may edit retention periods based on the administrative, fiscal, legal, and historical value of the records.

The local school district, education service center, or career technical school should also notate the media type of the records on the schedule in column 4. The records can be maintained on separate formats (i.e. paper and electronic) for different amounts of time.

Permanent records existing solely in electronic format may become inaccessible through media decay and/or hardware/software obsolescence. The Ohio History Connection recommends that digital records with greater than a 10 year retention period also be maintained in either paper or microfilm formats.

Records may not be disposed of until all audits are released and audit discrepancies have been settled. Where a lawsuit or agency proceeding is pending, a legal hold on relevant records is required. Records shall be retained until the legal hold has been removed.

ELECTRONIC MAIL (e-mail) is a format on which records are sent, received and/or drafted using electronic mailing systems. E-mail is NOT a record series. Instead, each individual e- mail should be evaluated according to its content and retained in accordance with the record series adopted within this schedule that the content most closely fits.

Before this records retention schedule is considered in effect for a particular school district it must first be signed by a local responsible official and local records commission chair, the State Archives, and the State Auditor's Office.

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	**For use by LGRP** RC- 3 Required
	Board and Administrative Records				
101	Minutes – Official copy of proceedings of regular and special meetings	Permanent			☑
102	Audio tapes/DVD's of Minutes – Recording of Board meetings	2 years			☐
103	Board Meeting Notes – Notes taken during Open Board Meetings used to formulate the minutes	1 year			☐
104	Agendas – Written outlines of material to be discussed at the Board of Education meetings	1 calendar year provided audited			☐
105	Board Meeting Packets – Packets prepared for board members. May include agendas, copies of reports and informational handouts.	Retain until minutes transcribed and approved			☐
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 calendar year			☐
107	Blueprints, Plans, & Maps –Provide detailed description of school facilities and property	Permanent			☑
108	Deeds, Easements, Leases – Real estate documents of ownership, easements and leased property by district	Permanent			☑

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
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	1 year after superseded			☐
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.	1 year after superseded			☐
111	Court Decisions – Court proceedings involving the District excluding claims and litigations	Permanent			☑
112	Claims and Litigations – Court processing for which the District is being or is suing for damages	Permanent			☑
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.)	Retain until completion of State Auditor's examination report or retain for period required by grant or program, whichever is later, then destroy			☐
114	Boundary Records - Official legal description of school district boundaries, educational service center district boundaries, or director district boundaries	Permanent			☑

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
115	Grievance Files/Settlements/Arbitration - Documentation of settlements and arbitration, grievances filed by local collective bargaining groups	10 years			☐
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			☑
117	Monthly Administrative Reports & Supporting Documentation – Reports submitted monthly by administrators and supervisors on current activity in District associated with Board Agenda	1 calendar year			☐
118	Elections – Items put on the ballot (tax levy related) regarding the financial support of the District	10 years			☐
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	Permanent			☐
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	8 years after superseded			☐
121	Budget Policy Files – annual budget (tax and appropriation) preparation and documentation	5 years			☐
122	Workers Compensation Claims – Claims filed by employees due to on the job injury	10 years after financial payment made			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
123	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	4 years after completion			☐
124	Organization Reports	2 years provided audited			☐
125	Adopted Courses of Study – A comprehensive instructional program serving the educational needs of the students of the District	Until superseded			☐
126	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			☐
127	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			☐
128	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.	Retain for six years after end of school year			☐
129	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.	Retain until end of school year or until superseded, whichever is later, then destroy.			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
130	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.	Retain for 6 years after image/recording no longer being used, then destroy.			☐
131	Public Record Requests – Requests for records & documentation that requests were fulfilled	2 years			☐
132	Organizational Memberships	Until superseded			☐
133	Visitor Log	1 school year			☐
134	Before and After School Child Care (Latchkey) Sign In/Out Sheets	2 years			☐
135	Before and After School Child Care (Latchkey)Receipts & Weekly Reports Receipts & detail information to back-up Treasurer receipts	4 years provided audited			☐
136	Before and After School Child Care (Latchkey) Registration Forms	2 years			☐
137	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 plus current year provided audited			☐
138	Legal Advertisements / Notices- Announcements to inform the public of meetings, hearings, bids, auctions or other events	1 year			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
	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, PERS information, exit interview, disciplinary action(s), waiver(s).	Purge and destroy 7 years after employment termination			☐
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.			☐
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			☐
204	Comp Time Cards – Accumulated and used comp time cards	Current fiscal year			☐
205	Drug Test Records – Includes random pool eligibility lists of employees eligible to have random drug screen and drug screening results	5 years			☐
206	Teacher Lesson Plan Books	End of current school year or until superseded			☐
207	Employee Contracts – Written agreement between the District and the employee	4 years after termination			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
208	Professional Conference Applications – Professional leave forms requesting permission to attend professional development activity	2 years provided audited			☐
209	Irregular Employee Contracts – Written agreement between the District and substitutes and other irregular employees benefits	4 years after contract expires			☐
210	Unemployment Claims – Invoice maintained by Human Resources for the payment of unemployment claims approved or denied	5 years provided audited			☐
211	Unemployment Records – Documentation of unemployment records	5 years			☐
212	Applications (not hired) – Applications submitted of individuals not hired into the District	2 years provided audited			☐
213	Schedules of Employees	Fiscal year plus 2 years			☐
214	Teacher Personnel Reports (internal)	Fiscal year plus 1 year			☐
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.	3 years after date of hire or 1 year after termination, whichever is later			☐
216	Job Descriptions – Description of expectations and responsibilities of each job	Retain until superseded or obsolete			☐
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			☐
218	LPDC (Local Professional Development Committee) Licensure Records and Staff Summary Reports	Until superseded			☐
219	LPDC (Local Professional Development Committee) Meeting Minutes	10 years			☐
220	Staff Acceptable Use Policy – A Form signed by staff agreeing to use the District network responsibly for District related work	6 years			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	**For use by LGRP** RC- 3 Required
221	Staff Profile – Listing including current position, licensure, degree, retirement credit, and contract information	5 years			☐
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	3 years plus current year provided audited			☐
223	Teachers Certificates and Temporary Professional Education Permits	6 years after end of fiscal year, then destroy			☐
224	Employee Handbooks – Handbooks that each employee receives upon being hired	Until superseded			☐
225	Physician's Report of Work Ability – Physicians report of ability/restrictions for injured employees	7 years			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
	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			☐
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			☐
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			☐
304	Foreign Exchange Records – Records of students from foreign countries	75 years after graduation, withdrawal, or transfer			☐
305	Home Schooled Records – Records of students living within the District that are being schooled from home	75 years after graduation, withdrawal, or transfer			☐
	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			☐
307	Activity Record – A list of activities students participated in during their high school years	6 years after graduation, withdrawal, or transfer			☐
308	Liability Waivers – Records document the release of the school, district, or ESC from liability related to various activities that include student, volunteer, or citizen involvement. Records may include but are not limited to release forms with terms, date, signatures, and related information. Includes athletic participation waivers and forms related to legal requirements such as Lindsay's Law.	3 years after school year in which records were created. In the event of accident or injury, retain until minor reaches the age 21			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
309	Student Athlete Files- Records maintained on student athletes, including physical exams, consent forms, and eligibility evaluations.	3 years after school year in which records were created			☐
310	Student Worker Applications	6 years after graduation, withdrawal, or transfer			☐
311	Student Work Permits- State issued permit for a student under the age of 18 to be employed	3 years			☐
312	Discipline Records – Record of discipline that a student has received including Saturday school, suspensions, and expulsions. Record includes notices to parents.	6 years after graduation, withdrawal, or transfer			☐
313	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			☐
314	Bullying/Harassment Forms – Documentation of bullying/harassment incidents within the district, along with action taken	6 years after graduation, withdrawal, or transfer			☐
315	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			☐
316	Attendance/Absence Records – Record of student attendance/absence including daily office call sheets, sign-in sheets, and doctor and parent's notes	1 year			☐
317	Cumulative Photo Records	1 year after graduation			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
318	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.).	1 year after graduation			☐
319	Parent/Legal Guardian Permission Slips for Internet Access and Film Viewing	Retain until end of school year, then destroy			☐
320	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			☐
321	Statement of Requirements and Expectations Signed and Returned by Parent/Legal Guardian	Retain until end of school year, then destroy.			☐
322	Student Schedules/Contact Information	Until superseded			☐
323	Interim Grade Reports – Mid-term status report of student performance with teacher comments not part of permanent record	End of current school year			☐
324	Student Organization Activity Records – Purpose clauses/budgets of student clubs engaging in financial activities	2 years after end of fiscal year			☐
325	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			☐
326	Custody Court Documents – Verification of court established guardianship/custody	Until superseded or student reaches 18 years of age			☐
327	Notice of Placement Termination – A notice of termination of placement relinquishing care and control, noticed received from the County Juvenile Court	5 years			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC-3 Required
Special Needs Records 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. 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.					
337	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.	Retain 6 years after student graduates or would have normally graduated.			☐
338	Psychological Records (Restricted) – Records that document all students who are provided counseling, psychological 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	Retain 10 years after last contact. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1)			☐
339	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	Retain 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)			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
328	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			☐
329	Teacher Grade Books/Records	3 years provided audited			☐
330	Pre-School Screening Profile – ASQ/SE, GGG assessment record. A screening profile used for pre-school students	3 years			☐
331	Open Enrollment Forms - Registration of student living outside the district enrolling into the school District	5 years			☐
332	Transfer Records – Records of students transferring from one school to another (granted/not granted)	5 years			☐
333	Emergency Information – A form containing student emergency contact information	Until superseded			☐
334	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	10 years after last contact			☐
335	Health Logs – Record of health care services provided to students such as medication and first aid.	2 years			☐
336	Free/Reduced Price Lunch Application – Confidential applications for free and reduced lunch benefits	4 years			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
340	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)	Retain 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)			☐
341	504/ADA Plan – Plan that allows various accommodations for a student with a general disability	Retain 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)			☐
342	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	Retain for 6 years after student graduates or withdraws from district, then destroy.			☐
343	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.	Retain for 3 years after student graduates or withdraws from district, then destroy.			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
344	Special Needs Records (Student not Eligible) - Referrals, evaluations, evaluation reports, and notices for students determined not to be eligible for the special education program	Retain for 5 years after student determined to be ineligible then destroy.			☐
345	Student Psychological or Social Assessment (Non-Special Education)- Source materials used in preparing reports, including protocols, tests, and notes	Retain 1 year after report is written			☐
346	Student Psychological or Social Assessment (Special Education)- Source materials used in preparing reports, including protocols, tests, and notes	Retain 6 years			☐
	BUILDING RECORDS				
401	Building Account Reports – Report of maintenance and custodial services accounts	Until superseded			☐
402	E-Rate Funding Application – Federal Telecommunications funding applications	6 years			☐
403	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			☐
404	School Safety Plans – Records related to ensuring student and staff safety at school, including harassment and bullying prevention plans	Retain 6 years after obsolete or superseded, then destroy			☐
405	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			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
406	Fire Inspection – Reports of building inspection performed by the city Fire Division	4 years provided audited			☐
407	Building Inspection Reports – Elevator, sprinkler, and alarm system reports	2 years			☐
408	Building Health Inspections – A record of all health inspections performed within a building	2 years after end of fiscal year			☐
409	Student Activity Records – Pay in forms, pay- out forms; account forms/Dist.; budget forms, requisitions; purchase order; ticket sales reports	2 years			☐
410	Receipt and Deposit Slips – copies of receipts for monies turned into the office	4 years provided audited			☐
411	Budget and Appropriation Records – Record of building budget	4 years provided audited			☐
412	Requisitions and Purchase Orders – Record of money being requested, and a record of items purchased form the building budget	2 years			☐
413	Inventories – Inventory of supplies, textbooks, and other materials purchased and used with the building	Until superseded			☐
414	Student Handbook – Handbook containing student policies, regulations and codes	Until superseded			☐
415	Building Security/Surveillance videos	Use for one cycle then reuse provided no action pending			☐
	Central Department Records				
	Administrative Offices				
501	School Calendars – Calendar for in session/out of session school days as well as professional days for teachers	5 years			☐
502	Personnel Directory – Names, phone numbers and addresses of all employees	10 years			☐
503	Enrollment Record (by grade/building)	Permanent			☑

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
504	Repair, Installation and Maintenance Records – A record of maintenance, installation and repairs performed on buildings within the District	4 years provided audited			☐
505	Building/Facilities and Equipment Inventory – Inventory of equipment owned by District	Until superseded provided audited			☐
506	Building, Boiler & Maintenance Reports – Inspection/ maintenance reports for each building including boiler inspection/ maintenance	Until superseded provided audited			☐
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			☐
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			☐
509	Work Orders – A report of all requested maintenance/custodial work	4 years provided audited			☐
510	Environmental Reports and Data – Reports on asbestos and other environmental issues	4 years provided audited			☐
511	Vandalism Reports – Reports of vandalism throughout the District	4 years provided audited			☐
512	Student Activity Purpose Clauses	Until superseded			☐
513	Sales Potential Form (Student Activities)	4 years provided audited			☐
514	Sales Potential Forms – Fundraising permission form including the financial summary of the fundraiser upon completion of the event	4 years provided audited			☐
515	Bids and Specifications (Unsuccessful) - Documentation of bids supplied by vendors for any project requesting bids in compliance with ORC	1 year provided audited			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
516	Bids and Specifications (Successful) - Documentation of bids supplied by vendors awarded any project requesting bids in compliance with ORC	6 years after completion of project			☐
517	Contractor Files – Contractor resolutions, additions drawings, etc.	5 years after completion of project provided audited and no action pending			☐
	Transportation Department				
518	Driver Physical – A report of the annual physical performed on drivers	6 years (OAC 3301-83-07-E-7)			☐
519	Daily Bus Schedules – may show bus route, time trip began and ended, number of pupils carried, and drivers signature	Retain for 6 years after end of school year, then destroy			☐
520	Fuel Consumption Data – Fuel records for the buses	4 years provided audited			☐
521	Transportation Records – Transportation requests received from schools that include student and busing information	4 years provided audited			☐
522	Field Trip Forms/Volunteer Driver Forms – Forms from building requesting busing for field trips	Fiscal year plus 2 years			☐
523	Preventive Maintenance Reports – A report of work performed to maintain equipment	Fiscal years plus 2 years			☐
524	Warranty/Guarantee – Warranty of equipment	Life of equipment			☐
525	Plant and Equipment Inventory	Until superseded provided audited			☐
526	Vendor Data: W-9 and 1099 documents maintained as long as active vendor then retention period is applied.	6 years and current provided audited			☐
527	Accident Reports - Law enforcement reports regarding bus accidents	3 years provided no action pending			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
528	Vehicle Registration – Certificates of title and registration paperwork from the BMV for cars, vans, trucks, and buses.	Life of vehicle			☐
529	Vehicle License - BMV licensing documentation of motor vehicles	1 year after termination			☐
530	Vehicle Records – Vehicle insurance, finance paperwork	As long as vehicle is owned by District			☐
531	Driver Certification – Bus driver certification form	1 year after termination			☐
532	Supplies Inventory – Shop/mechanic inventory	Until superseded			☐
533	Vehicle Defect Report – Record of defects on each bus	Life of vehicle			☐
534	Bus on Board Security & Surveillance videos	Use for one recording cycle then reuse provided no action pending			☐
535	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	Retain for 1 year after incident, then destroy			☐
536	Application for Special Transportation - Application for students with physical disabilities/medical problems	4 years after end of fiscal year or until completion of State Auditor's examination report, whichever is sooner			☐
537	Bus Condition Checklist - Daily evaluation of bus by drivers	Retain for 1 year after end of school year			☐
	Food Services Department				
538	Food Service Records – Financial information, breakfast cost sheets, milk sold, menus, students served	4 years provided audited			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
539	Lunchroom Records – Cashier's daily production sheets from each building, cash register tapes	4 years provided audited			☐
540	Lunchroom Reports – Confidential applications for free and reduced lunch benefits	4 years provided audited			☐
541	Inventories – Inventory of food supplies	4 years provided audited			☐
542	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			☐
543	Vendor Food Service Contract – Contract between the District and an outside vendor providing meals and snacks	3 years plus current year provided audited			☐
544	Schedule for School Breakfast/Lunch Programs – Includes plan and backup documentation submitted to Ohio Board of Education for program approval	Retain for 6 years after plan obsolete or superseded, then destroy			☐
	Financial Records				
601	Audit Reports – Past management evaluation reports, monthly claim documentation, master lists, and income eligibility applications	3 years plus current year provided audited			☐
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	5 years provided audited			☐
603	Activity Fund Cash Journal & Ledger	5 years provided audited			☐
604	Bond Register	20 years after issue expires			☐
605	Securities	Permanent			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC-3 Required
606	Investment Ledger – Report of investments owned by District	5 years provided audited			☐
607	Foundation Distribution – Report from the Ohio Dept. of Education for bi-monthly foundation (state basic aid) receipts	5 years provided audited			☐
608	Tax Settlements (Semi-Annual) and Advances – Property tax settlement sheet including advances from the County Auditor included in the receipts	5 years provided audited			☐
609	Budgets (Annual) - Tax budget that is submitted annually to the County Auditor	5 years provided audited			☐
610	Budget Working Papers	5 years provided audited			☐
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			☐
612	Contracts – An agreement with specific terms between an entity with the School District (ORC §2305.06)	6 years after expiration			☐
613	Bonds and Coupons	Until redeemed provided audited			☐
614	Accounts Payable Ledger – Outstanding payables	5 years provided audited			☐
615	Accounts Receivable Ledgers – Outstanding revenue due to the school District	5 years provided audited			☐
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.			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
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	10 years provided audited			☐
618	Federal Programs – Title I (Student Progress Reports), II, III, IV-B, IDEA, IV-C, VI-B, Chapter 1, 2; Drug Free, etc.	10 years provided audited			☐
619	Travel Expense Vouchers – Document of expenditures for travel of district employees	10 years provided audited			☐
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			☐
621	State Reimbursement Settlement Sheets	5 years provided audited			☐
622	Unemployment Claims – Documentation of unemployment for application of unemployment benefits	5 years			☐
623	Employee Bonds, Board Member Bonds – Documents related to the performance and theft insurance bidder held on required employee and board members	5 years			☐
624	Certificate of Estimated Resources – County document supplied to the district certifying the estimated resources prepared by the District	15 years after expiration			☐
625	Appropriation Resolutions – Resolution approved by the Board of Education establishing and amending the appropriation for the District	5 years			☐
626	Tax Apportionments (Semi-Annual) – Documentation prepared by the County Auditor and report to the District to record receipt of property tax settlement	5 years			☐
627	Canceled Checks and Bank Settlements – All checking accounts reconciliation and statements	4 years provided audited			☐
628	Publication Notice – Legal notice of publication in the newspaper	4 years			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
629	Tuition Fees and Payments – Receipt records at the Treasurer's Office	4 years provided audited			☐
630	Unpaid Student Fees	Through graduation			☐
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			☐
632	Investment Records – Individual record of investments bank confirmations, wire transfers, copies of CD's	4 years provided audited			☐
633	Travel Expense Reports	10 years provided audited			☐
634	State Sales Tax Reports – State of Ohio semi- annual sales tax filings, reporting any taxable sales.	4 years provided audited			☐
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			☐
636	Check Registers – Lists of checks issued by the District	4 years provided audited			☐
637	Deposit Slips/Cash Proofs – Receipts for deposit slips	4 years provided audited			☐
638	Receipt Books – Receipts issued for money received.	4 years provided audited			☐
639	Extra Trip Records	4 years provided audited			☐
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			☐
641	Accounting Data – Documentation of bids supplied by vendors for any project requesting bids in compliance with ORC	4 years provided audited			☐
642	Service Contracts - Contracts for services provided from an outside education	4 years provided audited			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
643	State Subsidy Reports – Applications for driver education, pupil transportation and special education	3 years provided audited			☐
644	Delivery/Packing Slips	1 year provided audited			☐
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 after end of fiscal year			☐
646	Non-Sufficient Fund Checks Documentation & Notifications	4 years provided audited			☐
	Payroll Related Records				
701	Salary Continuation Agreement – Agreement stating full or partial compensation during period of disability	7 years			☐
702	Payroll Ledgers – Record of gross to net calculations by employee	75 years			☐
703	Earning Registers – Record of gross to net calculations by employee and by calendar year	75 years			☐
704	Monthly Payroll Reports – A record of leave usage and accumulation by employee as well as retirement contributions by employee	75 years			☐
705	Bureau of Employment Service Quarterly Reports – OBES reports (quarterly earnings and record of weeks worked by employee)	7 years			☐
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			☐
707	Federal Income Tax – Quarterly and annual record of federal income tax withheld and remitted IRS form 941	6 years and current provided audited			☐
708	Ohio Income Tax – Monthly and annual record of Ohio Income tax withheld and remitted IT-4	6 years and current provided audited			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
709	City Income Tax – Monthly and annual record of municipality income tax withheld and remitted	6 years and current provided audited			☐
710	School Income Tax – Monthly and annual record of School District income tax withheld and remitted SDIT-I	6 years and current provided audited			☐
711	Payroll Reports – Payroll deduction and distribution reports	4 years provided audited			☐
712	Payroll Update Listing	4 years provided audited			☐
713	Payroll Calculations – Paper and electronic reports used to balance gross net calculations	4 years provided audited			☐
714	State Teachers System and School Employees Retirement System Waivers – Waiver forms for students and/or jobs not eligible for retirement withholding	Permanent			☐
715	State Employees Retirement System (SERS) - Record of SERS withholdings monthly	4 years provided audited			☐
716	State Teachers Retirement System (STRS) Record of STRS withholdings per pay and annual	4 years provided audited			☐
717	Annuity Reports	4 years provided audited			☐
718	Benefit Folders/Reports – Listing of employee's benefit enrollments	4 years provided audited			☐
719	Employee Requests and/or Authorization for Leave Forms – Request for sick, vacation, personal, or other leave	4 years provided audited			☐
720	Deduction Reports – Voluntary payroll deductions per pay that include all deduction withholdings for each employee	4 years provided audited			☐
721	Employee Vacation/Sick Leave Records - Records of each employee's sick and vacation leave	4 years provided audited			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
722	Time Sheets - Record of hours worked	6 years provided audited			☐
723	Overtime Authorization	6 years			☐
724	Employee Insurance Bills – Monthly reconciliation of employee medical, dental and life insurance bills	4 years provided audited			☐
725	Paycheck Register – Listing of checks issued each pay	4 years provided audited			☐
726	Payroll Bank Statement – Includes bank statements and reconciliation	4 years provided audited			☐
727	Deduction Authorization – Forms to withhold deductions from an employee's pay	Until superseded or employee terminates			☐
728	Court Ordered Garnishments	4 years after cause fully paid			☐
	Reports				
801	State Audits /GAAP (Generally Accepted Accounting Principles) Reports– Annual financial audit reports	5 years			☐
802	Special Education (S.E.) Reports – Annual	7 years			☐
803	Vocation Education (V.E.) Reports - Annual	5 years			☐
804	Ohio Common Core Data (OCCD) Reports: Data on revenues and expenditures per pupil made by school districts.	5 years			☐
805	Drivers Education Report	5 years			☐
806	Ohio Department of Education (ODE) Reports– Academic reports from the Ohio Department of Education	5 years			☐

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
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	Retain for 5 years after end of school year then destroy.			☐
808	Civil Rights Reports – U.S. Department of Education Civil Rights Data Collection and any past reports	Permanent			☑
809	Title IX Reports – Includes any required reporting as requested by state or federal agencies	10 years			☑
810	State Minimum Standards – A record of minimum standards given to the District by the State Department	10 years			☑
811	Personnel State Reports (SF-1, CS-1)	4 years provided audited			☐
812	Worker's Comp Wage Reports	5 years			☐
813	Worker's Comp Payroll Reports	5 years			☐
814	Bank Balance Certification (Co. Auditor)	5 years			☐
815	Transportation Reports – State transportation reports, T-1 and T-2	4 years provided audited			☐
816	EMIS Reports	7 years			☐

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

Sch. #	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	For use by LGRP RC- 3 Required
	General Records				
901	Directives, Standards, Laws for Local, State, and Federal Governmental Agencies	Until Superseded			☐
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.	5 years; file with related records if content requires longer retention; appraise for historical value.			☐
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			☐
904	Transient Correspondence/Material– All informal and/or temporary messages and notes, including email and voice mail messages, andall 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	Retain until no longer of administrative value, then destroy			☐
905	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			☐
906	Exposure Reports – Report of contact with blood or other potentially infectious materials	7 years			☐
907	Incident/Accident Reports – A report of student/employee injuries or accidents including place, time and witnesses	7 years provided no action pending			☐