

APPENDIX B

RECORDS RETENTION SCHEDULE

How To Use The Retention Schedule

The records retention schedule lists records that are created, received or retained as a result of district operations. The schedule includes a description of the records, format in which the records will be retained, classification of the records, retention period, and disposal code. The following information will assist in applying this schedule.

Media codes are used to identify the format(s) of a record and are assigned as follows:

- A. Paper
- B. Microform
- C. Electronic (machine readable)
- D. Audiovisual (tapes, movies, film strips, etc.)
- E. Cartographic (maps, drawings, blue prints, plans, etc.)
- F. Photographic

District records will be classified based on the information contained therein. Public records will be identified and made available for inspection in accordance with law and regulations. Records containing private or confidential information will be protected from unauthorized access in accordance with law, regulations, Board policy and administrative regulations.

Retention periods listed on the schedule are given in years, unless otherwise indicated. Upon expiration of the retention period, identified records will be disposed of in accordance with the schedule.

Disposal codes are used to direct the final disposition of records. Records must be disposed of according to the assigned code listed on the schedule. Assigned disposal codes are as follows:

1. Routine Handling — No special precautions are necessary upon disposal. The records should be recycled or disposed of in accordance with standard district procedures.

2. Special Handling — The destruction of records containing confidential or sensitive information that requires special handling by shredding, burning, recycling or any other method that reduces information to an illegible condition.
3. Archival Retention — Records requiring permanent retention or records that have sufficient archival or historic value must be preserved in perpetuity.
4. Delete — For use with electronic records. When electronic records have met their retention period, they will be deleted.

Records Not On Schedule

For any record not covered by the retention schedule, the Records Management Committee will determine how long the record must be kept and recommend any necessary revisions to the retention schedule.

Schedule

NOTE that the retention period listed below is the minimum period recommended or required by law or regulations.

Record Description	Record Format	Record Classification	Retention Period (in years)	Disposal Code
Accident Reports	A	Public	5	1
Accounts Payable	A	Public	6	1
Accounts Receivable	A	Public	6	1
Adopted Annual Budget	A/C	Public	10	1
Annual Financial Reports	A/C	Public	Permanent	3
Annual Audit Reports	A/C	Public	Permanent	3
Attendance Records (Employees)	A/C	Private	3 after employment ends	2
Background Check Documentation	A	Private	7 after employment ends	2
Bank Statements	A	Public	6	1
Bid Contracts (Accepted)	A	Public	6 after termination	1
Bid Contracts (Declined)	A	Public	3 after completion	1
Board Minutes	A/C	Public	Permanent	3
Board Policies and Procedures (Current)	A/C	Public	Permanent	3

Record Description	Record Format	Record Classification	Retention Period (in years)	Disposal Code
Board Policies and Procedures (Old)	A/C	Public	Permanent	3
Budget Work Papers	A/C	Contains private info	1 after adoption	2
Check Registers	A/C	Public	6	1
Collective Bargaining Agreements	A/C	Public	3 after expiration	1
Complaints (By or About Employee)	A	Private	7 after employment ends	2
Complaints (General)	A	Public	6	1
Construction Contracts	A	Public	12 after termination	1
Continuing Education/Professional Development	A	Private	3 after employment ends	2
Correspondence (General)	A	Public	3	2
Correspondence (Superintendent)	A	Public	Permanent	3
Credentials (Certificates/Licenses)	A	Private	4 after employment ends	2
Deeds and Related Records	A	Public	Permanent	3
Deposit Slips	A	Public	6	1
Discipline Records (Employees)	A	Private	7 after employment ends	2
District Organization Records	A	Public	Permanent	3
Emergency Preparedness Plan	A	Public	2 after revised	1
Employee Training Programs	A/C	Private	15 after employment ends	2
Employment Application (Hired)	A	Public	7 after employment ends	1
Employment Application (Not Hired)	A	Public	3	1
Employment Contracts	A	Public	3 after employment ends	1
Equal Employment Opportunity Reports	A	Public	3	1

Record Description	Record Format	Record Classification	Retention Period (in years)	Disposal Code
Equipment Inventories	A/C	Public	6	1
Ethics Statement of Financial Interest	A	Public	5	1
Evaluations (Employees)	A	Private	3 after employment ends	2
Facility Use Files	A	Public	6	1
Fixed Asset List	A/C	Public	Permanent	3
Free and Reduced Lunch	A/C	Public	5	1
General Ledger	A/C	Public	Permanent	3
Grievances	A	Private	7 after employment ends	2
Insurance Claims and Policies	A	Public	6 after settlement and/or expiration	1
Investment Records	A	Public	6 after cancellation	1
Leases (Real Estate)	A	Public	Permanent	3
Leases (Equipment/Vehicles)	A	Public	6 after expiration	1
Leave Records (FMLA)	A	Private	3 after employment ends	2
Leave Records (Other)	A	Private	3 after employment ends	2
Litigation Files	A	Private	7 after final conclusion of litigation	2
Medical Records (Employee)	A	Confidential	3 after employment ends	2
Medical Records (Student)	A	Private	2 after graduation	2
Payroll Records	A/C	Contains private info	6	2
Pesticide Application Record	A	Public	3	1
Pre-Employment Medical Examination	A	Confidential	3 after employment ends	2
Pre-Employment Reference Checks	A	Confidential	3 after employment ends	2
Press Releases	A	Public	Permanent	3
Purchase Orders	A/C	Public	6	1
Real Property Purchase or Sale	A	Public	Permanent	3

Record Description	Record Format	Record Classification	Retention Period (in years)	Disposal Code
Resignation/Retirement Records	A/C	Private	7 after employment ends	2
Safe School Act Reports	C	Public	Permanent	3
Student Records*	A/C			
Category A	A	Contains private info	100	3
Category B	A	Contains private info	Reviewed periodically	2
Category C	A	Contains private info	Reviewed annually	2
Tax Collection Records	A/C	Public	6	1
Wage and Tax Statements (W-2 Forms)	A/C	Private	4	2
Withholding Allowance Certificates (W-4 Forms)	A	Private	4 after employment ends	2
Workers' Compensation Records	A/C	Contains private info	7 after claim closed	2

* See, District Policy 216 and 216.1