

## **RECORDS RETENTION AND DISPOSAL SCHEDULE**

The orderly acquisition, storage and retention of school District records is essential for the overall efficient and effective operation of the District. State law establishes a District Records Commission to govern matters pertaining to District records, their retention and disposal in accordance with O.R.C. §149.41.

Pursuant to Ohio law, the District Records Commission (the “Commission”) shall consist of the Board President, Treasurer, and Superintendent. The Board President shall serve as chairperson of the Commission. The Treasurer shall serve as secretary of the Commission. The members of this Commission shall appoint necessary records officers through the District to carry out the necessary work associated with District records.

In accordance with Ohio law, the Commission shall meet at least once annually to review certificates of records disposal forms (RC-3) as submitted by the records officers. Meetings are to be conducted in accordance with Ohio’s Open Meetings Law. Upon the approval of the Commission, such records may be disposed of, pursuant to the following standards:

1. Procedures to dispose of records according to the District’s approved General Schedule of Records Retention and Disposition (RC-2) will be initiated annually.
2. For one-time disposals of records separate and distinct from the approved General Schedule of Records Retention and Disposition, the Commission will submit an Application for One-Time Disposal of Obsolete Records (RC-1) to the Ohio Historical Society for approval.
3. Records officers will list those eligible, disposable records on the Certificate of Records Disposal (RC-3), in accordance with the District’s approved schedule.
4. The Commission shall review the Certificate of Records Disposal forms as submitted, annually.
5. Upon the Commission’s approval, the certificates (RC-3) will be forwarded as follows:
  - Original - Forward the original to the Ohio Historical Society.
  - Copies - Keep one copy for the Record Commission files.
    - The Ohio Historical Society sends a copy to the State Auditor’s office. The school district does not need to send a copy to the State Auditor’s office.

6. Records shall be destroyed only as directed by the Commission.

A. Description of Forms

- RC-1: The RC-1 is a one-time records disposal schedule. It preempts the RC-2 and approval for disposal is limited to the listed documents only. This form is to be used rarely.
- RC-2: The RC-2 Form is used to establish the general Schedule of Records Retention and Disposition to be used by the District. It is created and approved by the Commission and then approved by both the Ohio Historical Society and the State Auditor's Office.
- RC-3: The RC-3 Form is also called the "Certificate of Disposal." This form gives notice as to when records are to be disposed according to the pre-approved general Schedule of Records Retention (RC-2). This form serves as notice to the Ohio Historical Society and State Auditor's Office that records will be disposed of by the Commission according to the pre-approved general Schedule. The Commission prepares and mails the RC-3 to the Ohio Historical Society fifteen (15) business days prior to disposal.

Procedure

RC-1 Process

1. The Commission approves the Application for One-Time Disposal of Obsolete Records (RC-1) in an open meeting.
2. The Commission forwards the RC-1 Application to the Ohio Historical Society for review and approval.
3. The Ohio Historical Society forwards the RC-1 Application to the Auditor of State for review and approval.
4. The Ohio Historical Society will make a copy and mail it to the Commission for its records and will keep a copy for its own files.

RC-2 Process

1. The Commission approves a General Schedule of Records Retention and Disposition (RC-2) in an open meeting.

2. The Commission forwards the RC-2 General Schedule to the Ohio Historical Society for approval.
3. The Ohio Historical Society reviews and approves the RC-2 General Schedule if acceptable, and then forwards to the Auditor of State Records Officer in Columbus, Ohio.
4. The Auditor of State Records Officer reviews and approves the RC-2 General Schedule and makes a copy to be maintained in the Columbus office. The original is mailed back to the Ohio Historical Society.
5. The Ohio Historical Society will make a copy and mail it to the Commission for its records and will keep a copy for its own files.

#### RC-3 Process

1. The District's Records Officer completes the RC-3 Form when disposal is timely according to the pre-approved RC-2 General Schedule, or the RC-1 Application for One-Time Disposal.
2. The District retains one (1) copy of the RC-3 Form for Commission files and mails the original to the Ohio Historical Society.
3. The Ohio Historical Society forwards the RC-3 Form to the State Auditor's Office on behalf of the Commission.
4. The Commission waits fifteen (15) business days after mailing the RC-3 Form to the Ohio Historical Society and then disposes of records according to the approved Schedule.
5. If, for some reason, disposal is not appropriate, the Ohio Historical Society will inform the Commission within the fifteen (15) business day period established for such a situation.

#### B. Records Retention and Destruction Schedule (Form RC-2)

##### 1000 - BOARD AND ADMINISTRATIVE RECORDS

##### 2000 - EMPLOYEE RECORDS

##### 3000 - STUDENT RECORDS

##### 4000 - BUILDING RECORDS

5000 - CENTRAL DEPARTMENT

6000 - FINANCIAL RECORDS

7000 - PAYROLL RELATED RECORDS

8000 - REPORTS

9000 - OTHER

Symbols Meanings: “After end of fiscal year” means the number of years specified plus the current year.

“Provided Audited” means the record series has been audited by the Auditor of State and the audit report released.

C. ELECTRONIC MAIL

E-mail which meets the definition of a record is to be placed in one of the categories set forth in this Retention and Disposal Schedule. E-mail which is not a record may be deleted immediately when the recipient or sender no longer has a need for it. The category into which E-mail that qualifies as a record is to be placed for retention and disposal will be governed by the information it contains or the purpose the E-mail serves. Further, the content, transactional information, and any attachments associated with the message are considered part of the record to be retained. E-mail which is a record and which cannot be placed into one of the existing categories is to be retained and disposed of according to the schedule set forth in the “9000-OTHER” category.

E-MAIL CATEGORIES

Transient Documents: Includes telephone messages, drafts and other limited documents which serve to convey information of temporary importance in lieu of oral communication.

General Correspondence: Includes internal correspondence (letters, memos); also, correspondence from various individuals, companies, and organizations requesting information pertaining to local and legal interpretations and other miscellaneous inquiries. This correspondence is informative (it does not attempt to influence policy).

Routine Correspondence: Referral letters, requests for routine information or publications provided to the public and which are answered by standard form letters.

Monthly and Weekly Reports: Document status of on-going projects and issues; advise administrators of various events and issues.

Minutes of Staff Meetings: Minutes and supporting records documenting internal policy decisions.

Executive Correspondence: Correspondence dealing with significant aspects of the administration of their offices. Correspondence includes information concerning agency policies, program, fiscal and personnel matters.

Adopted: August 12, 2014

<b>Schedule Number</b>	<b>Record Title and Description</b>	<b>Retention Period</b>
<u>1000</u>	<u>BOARD AND ADMINISTRATIVE RECORDS</u>	
1101	Minutes Treasurer	Permanent
1101.1	Audio Tapes Treasurer	2 Years*
1102	Blueprints, Plans, Maps Business Office and Secretary	Permanent
1103	Deeds, Easements, Leases Treasurer	Permanent
1104	Board Policy Books and Other Adopted Policies Superintendent and Secretary	1 Year After Superseded
1105	Administrative Regulations Superintendent and Secretary	1 Year After Superseded
1106	Court Decisions Treasurer	Permanent
1107	Claims and Litigation Treasurer	Permanent
1201	Elections Treasurer	10 years
1202	Record Disposal Forms (RC-3) Treasurer	10 years
1203	Bargaining Agreements Treasurer	10 Years After Expiration
1204	Budget Policy Files Treasurer	5 years

Schedule Number	Record Title and Description		Retention Period
1301	Workers' Compensation Claims	Treasurer	10 Years After Financial Payment Made
1302	Bank Depository Agreements	Treasurer	4 Years After Completion
1303	Organization Reports	Treasurer	2 Years**
1304	Board Meeting Notes	Treasurer	1 Years
1305	Agendas	Treasurer	1 Calendar Year**
1401	Adopted Courses of Study	Superintendent and Secretary	Until Superseded
1402	Adopted Special Education Programs	Superintendent and Secretary	Until Superseded
1403	Adopted Special Programs	Superintendent and Secretary	Until Superseded

\*\*Provided Audited.

Schedule Number	Record Title and Description		Retention Period
<u>2000</u>	<u>EMPLOYEE RECORDS:</u> (Employee records include employment applications, resumes, contracts/salary notices, evaluations, personnel actions, absence certification, transcripts and any other documents which became part of the employee file.)		
2101	Certificated Active Employees	Treasurer and Secretary	Permanent
2102	Classified Active Employees	Treasurer and Secretary	Permanent
2103	Certificated Inactive Employees	Treasurer and Secretary	Permanent***
2104	Classified Inactive Employees	Treasurer and Secretary	Permanent***
2105	Civil Rights, Civil Service, and Disciplinary Reports	Treasurer and Secretary	Permanent***
2107	Retirement Letters	Treasurer and Secretary	Permanent***
2108	Substitute Records	Treasurer and Secretary	25 Years
2301	Employee Contracts	Treasurer	4 Years After Termination from Employment

\*\*\*Hard copy maintained for three (3) years after audited, then microfilmed.



<b>Schedule Number</b>	<b>Record Title and Description</b>		<b>Retention Period</b>
2302	Professional Conferences Application	Treasurer and Secretary	2 Years**
2303	Irregular Employee Contracts (Substitutes, etc.)	Treasurer	4 Years After Contract Expires
2304	Unemployment Claims	Treasurer	5 Years
2305	Unemployment	Treasurer	5 Years
2306	Applications (not hired)	Treasurer and Secretary	2 Years**
2307	Schedules of Employees	Treasurer and Secretary	Fiscal Year Plus 2 Years
2308	Student Helper Applications	Treasurer and Secretary	2 Years
2309	Teacher Personnel Reports (internal)	Treasurer and Secretary	Fiscal Year Plus 1 Year
2310	I-9 Immigration Verification Forms	Treasurer and Secretary	Termination of Employment Plus 1 Year
2401	Job Descriptions	Treasurer and Secretary	Retain until Superseded or Obsolete

\*\*Provided Audited.

Schedule Number	Record Title and Description	Retention Period
3000	<u>STUDENT RECORDS</u>	
3101	Student Record Folders Enrollment/Withdrawal Information Grades/Transcripts Activities Record Attendance Records Individual Test Results Standardized Competency/Proficiency Aptitude Intervention Records Foreign Exchange Records Suspensions/Expulsions Home Schooled Student Records	Building Secretary Permanent***
3102	Office Record Card (K-9)	Building Secretary Permanent***
3103	Cosmetology Records	Voc. Secretary Permanent***
3201	Health/Medical Records Visual Screening Hearing Screening Immunization Records	Nurse/Building Secretary 7 Years After Graduation
3202	Discipline Records Letters to Parents Office Discipline	Building Secretary 1 Year after Student leaves School

\*\*\*Hard copy maintained for five (5) years after student leaves system, then microfilmed.

Schedule Number	Record Title and Description		Retention Period
3203	Psychological Records (Restricted)	Sp. Ed. Secretary/Nurse	Permanent***
3204	Child Abuse/Neglect Referral Letters	Building Secretary	Through Graduation
3301	Teacher Grade Book/Records	Building Secretary	3 Years**
3302	Pre-School Screening Profiles	Building Secretary	3 Years
3303	Age and Schooling Records (Work Permits)	Building Secretary	3 Years
3304	Accident Reports	Nurse/Building Secretary	5 Years, provided no action pending
3305	Individual Educational Plan (IEP)	Building Secretary Sp. Ed. Secretary	Permanent
3306	Free/Reduced Price Lunch Applications	Building Secretary	4 Years
3401	Emergency Information	Building Secretary	Until Superseded

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Schedule Number	Record Title and Description	Retention Period
4000	<u>BUILDINGS RECORDS</u>	
4202	Tornado and Fire Drill Records	Building Secretary
4203	Building Health Inspections	Building Secretary
4301	Student Activity Records Pay-In Forms Pay-Out Forms Account Forms/Dist. Budget Forms Requisitions Purchase Orders Ticket Sales Reports	Building Secretary
4302	Receipts/Deposit Slips	Building Secretary
4303	Budget/Appropriation Records	Building Secretary
4304	Requisitions/Purchase Orders	Building Secretary
4401	Textbook Inventories	Building Secretary
4402	Supplies Inventory	Building Secretary
4403	Student Handbooks	Building Secretary

\*After end of fiscal year.

\*\*Provided Audited.

Schedule Number	Record Title and Description		Retention Period
5000	<u>CENTRAL DEPARTMENTAL RECORDS</u>		
	<u>Administrative Offices</u>		
5201	School Calendars	Superintendent Secretary	5 Years
5301	Repair, Installation and Maintenance Records	Business Office and Secretary	4 Years**
5302	Prevailing Wage Records	Business Office and Secretary	4 Years**
5303	Rental Information (Use of Facilities)	Business Office and Secretary	4 Years**
5304	Work Orders	Business Office and Secretary	4 Years**
5305	Environmental Reports and Data (Asbestos, etc.)	Business Office and Secretary	4 Years**
5306	Vandalism Reports	Business Office and Secretary	4 Years**
5307	Student Activity Purpose Clauses	Business Office and Secretary	4 Years**
5308	Sales Potential Forms (Student Activities)	Business Office and Secretary	4 Years**
5309	Bids and Specifications (Unsuccessful)	Business Office and Secretary	1 Years**

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Schedule Number	Record Title and Description		Retention Period
5310	Bids and Specifications (Successful)	Business Office and Secretary	4 Years After Completion of Project**
5311	Contractor Files (Resolutions, Additions, Drawings, etc.)	Business Office and Secretary	Until Project Complete, If No Action Pending**
5401	Preventative Maintenance Reports	Business Office and Secretary	Fiscal Year Plus 2 Years
5402	Warranty/Guarantee	Business Office and Secretary	Life/Warranty of Equipment
5403	Plant and Equipment Inventory	Business Office and Secretary	Until Superseded**
5404	Textbook/Workbook Inventory	Curriculum Director and Secretary	Until Superseded**
5405	Supplies Inventory	Business Office and Secretary	Until Superseded**

\*\*Provided Audited.

Schedule Number	Record Title and Description		Retention Period
<u>Special Education Department</u>			
5221	Special Education Tutoring Reports	Sp. Ed. Secretary	10 Years
5222	Individual Educational Plan (IEP)	Sp. Ed. Secretary	Permanent***
5223	Psychological Records (Restricted)	Sp. Ed. Secretary	Permanent***
<u>Transportation Department</u>			
5340	Driver Physical	Trans. Secretary	2 Years After Termination
5341	Fuel Consumption Data	Trans. Secretary	4 Years**
5342	Transportation Records	Trans. Secretary	4 Years**
5343	Field Trip Forms and Volunteer Driver Forms	Trans. Secretary	Fiscal Year Plus 2 Years
5441	Accident Reports	Trans. Secretary	5 Years, Provided No Action Pending
5442	Vehicle Registration	Business Office and Secretary	Life of Vehicle

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Schedule Number	Record Title and Description		Retention Period
5443	Vehicle License	Business Office and Secretary	1 Year After Termination
5445	Driver Certification	Trans. Secretary	1 Year After Termination
5446	Supplies Inventory	Trans. Secretary	Until Superseded**
5447	Vehicle Defect Report	Trans. Secretary	Life of Vehicle
<u>Food Service Department</u>			
5561	Food Service Records Menus Food Production Milk Sold Students Served	Cafeteria Supervisor	4 Years**
5562	Lunchroom Records Cash Register Tapes Cashier's Daily Reports	Cafeteria Supervisor	4 Years**
5563	Lunchroom Reports (Free and Reduced)	Cafeteria Supervisor	4 Years**
5564	Inventories	Cafeteria Supervisor	Until Superseded**
5565	License, Lunchroom	Cafeteria Supervisor	1 Year after expiration

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Schedule Number	Record Title and Description	Retention Period
6000	<u>FINANCIAL RECORDS</u>	
6101	Annual Financial Reports Appropriation Ledgers Budget Ledgers Revenue Journals Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports Financial Summary Detail Reports	Treasurer 5 Years**
6102	Activity Fund Cash Journal and Ledger	Treasurer 5 Years**
6103	Bond Register	Treasurer 20 Years After Issue Expires
6104	Securities	Treasurer Permanent***
6201	Investment Ledger	Treasurer 5 Years**
6202	Foundation Distribution	Treasurer 5 Years**
6203	Tax Settlements (Semi-Annual) and Advances	Treasurer 5 Years**
6204	Budgets (Annual)	Treasurer 5 Years**

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Schedule Number	Record Title and Description		Retention Period
6205	Insurance Policies	Treasurer	15 Years After Expiration Provided All Claims Settled
6206	Contracts	Treasurer	15 Years After Expiration
6207	Bonds and Coupons	Treasurer	Until Redeemed**
6208	Accounts Payable Ledgers	Treasurer	5 Years**
6209	Accounts Receivable Ledgers	Treasurer	5 Years**
6210	Budget Work Papers	Treasurer	5 Years**
6211	Vouchers, Invoices and Purchase Orders	Treasurer	10 Years**
6212	State Program Files Aux. Services, DPPF, Adult Vocational, Excess Lottery, Data Processing, Public/Private Grants, etc.	Treasurer	10 Years**
6213	Federal Program Files Title I, II, III, IV-B, IV-C, & VI-B; Chapter 1, 2; Drug Free, etc.	Treasurer	10 Years**

\*\*Provided Audited.

Schedule Number	Record Title and Description	Retention Period
6214	Travel Expense Vouchers	Treasurer 10 Years**
6215	Tax Anticipation Notes (Records borrowing against future tax collections)	Treasurer 10 Years**
6216	State Reimbursement Settlement Sheets	Treasurer 5 Years**
6217	Unemployment Claims	Treasurer 5 Years
6218	Employee Bonds, Board Member Bonds	Treasurer 5 Years
6219	Certificate of Estimated Resources	Treasurer 15 Years after expiration
6220	Appropriation Resolutions	Treasurer 5 Years
6222	Tax Apportionments (Semi- Annual)	Treasurer 5 Years
6301	Cancelled Checks and Bank Statements	Treasurer 4 Years**
6302	Publication Notice	Treasurer 4 Years**
6303	Tuition Fees and Payments	Treasurer 4 Years**

\*\*Provided Audited.

Schedule Number	Record Title and Description	Retention Period
6304	School Finance (S.F.) Monthly Statement Treasurer	4 Years**
6305	Investment Records (May include individual record of investments, bank confirmation, wire transfers, copy of CD, etc.) Treasurer	4 Years**
6306	Travel Expense Reports Treasurer	10 Years**
6307	State Sales Tax Reports Treasurer	4 Years**
6308	Student Activity Fund (Pay-ins, Pay-outs, Receipts/Deposits, Reports) Treasurer	4 Years**
6309	Check Registers Treasurer	4 Years**
6310	Deposit Slips/Cash Proofs Treasurer	4 Years**
6311	Bids and Specifications (Unsuccessful) Treasurer	1 year**
6312	Bids and Specifications (Successful) Treasurer	4 Years After Completion of Project**
6313	Receipt Books Treasurer	4 Years**

\*\*Provided Audited.

Schedule Number	Record Title and Description	Retention Period
6314	Extra Trip Records	Treasurer 4 Years**
6315	Monthly Financial Reports	Treasurer 4 Years**
6316	Accounting Data	Treasurer 4 Years**
6317	Service Contracts	Treasurer 4 Years**
6318	State Subsidy Requests Applications for driver education, pupil transportation, special education, etc.	Treasurer 3 Years**
6319	Delivery/Packing Slips	Treasurer 1 Year**
6401	Requisitions	Treasurer 1 Year*

\*After end of fiscal year.

\*\*Provided Audited.

Schedule Number	Record Title and Description	Retention Period
7000	<u>PAYROLL RELATED</u>	
7001	Payroll Ledgers Bi-Weekly Payroll Reports Quarterly Payroll Reports	Treasurer Permanent***
7102	Earnings Registers By Staff Member By Calendar Year	Treasurer Permanent***
7103	Monthly Payroll Reports (Leave usage and accumulation, retirement service, etc.)	Treasurer Permanent***
7201	Bureau of Employment Services Quarterly Reports	Treasurer 7 Years
7301	W-2's, W-4's (Employer Copy)	Treasurer 6 Years and Current**
7302	Federal Income Tax (Quarterly/Annual)	Treasurer 6 Years and Current**
7303	Ohio Income Tax (Monthly/Annual)	Treasurer 6 Years and Current**
7304	City Income Tax (Monthly/Annual)	Treasurer 6 Years and Current**

\*\*Provided Audited.

\*\*\*Hard copy maintained for five (5) years, then microfilmed.

Schedule Number	Record Title and Description		Retention Period
7305	School Income Tax (Monthly/Annual)	Treasurer	6 Years and Current**
7306	Payroll Reports (Reports Used for Each Payroll — Computer Generated)	Treasurer	4 Years**
7307	Payroll Update Listings	Treasurer	4 Years**
7308	Payroll Calculations	Treasurer	4 Years**
7309	State Teachers Retirement System and School Employees Retirement System Waivers	Treasurer	Permanent***
7310	School Employees Retirement System (SERS) Reports	Treasurer	4 Years**
7311	State Teachers Retirement System (STRS) Reports	Treasurer	4 Years**
7312	Annuity Reports	Treasurer	4 Years**
7313	Benefit Folder/Report	Treasurer	4 Years**

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Schedule Number	Record Title and Description	Retention Period
7314	Employee Request and/or Authorization for Leave Forms (Sick, Vacation, Personal, or Other Leave)	4 Years**
7315	Deduction Reports Voluntary Payroll Deductions	4 Years**
7316	Employee Vacation/Sick Leave Records	4 Years**
7317	Time Sheets	6 Years
7318	Overtime Authorization	6 Years
7319	Employee Insurance Bills, Medical, Dental, Life	4 Years**
7323	Paycheck Register	4 Years**
7324	Payroll Bank Statement	4 Years**
7401	Deduction Authorization	Until Superseded or Employee Terminated

\*\*Provided Audited.



Schedule Number	Record Title and Description	Retention Period
8000	<u>REPORTS</u>	
8201	State Audit Reports	Treasurer 5 Years
8202	#59, #659, and #4502	Treasurer 5 Years
8203	#25 and #625	Treasurer 5 Years
8204	School Finance (S.F.) Reports – Annual	Treasurer 5 Years
8205	Special Education (S.E.) Reports – Annual	Sp. Ed. Secretary Superintendent Secretary 7 Years
8206	Vocation Education (V.E.) Reports – Annual	Superintendent Secretary Voc. Secretary 5 Years
8207	Ohio Common Core Data (OCCD) Reports	Superintendent Secretary 5 Years
8208	Drivers Education Reports	Treasurer 5 Years
8209	Ohio Department of Education (ODE) Reports	Building Secretary 5 Years
8211	Civil Rights Reports	Superintendent Secretary Permanent***

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Schedule Number	Record Title and Description		Retention Period
8212	Title IX Reports	Superintendent Secretary	10 Years
8213	SM-1 & SM-2 (Annual and Quarterly)	Treasurer	10 Years
8214	State Minimum Standards	Superintendent Secretary	10 Years
8301	Personnel State Reports (Currently SF-1, CS-2)	Secretary, Personnel	4 Years**
8302	Workers' Comp. Wage Reports (Co. Auditor)	Treasurer	5 Years
8303	Bank Balance Certification (Co. Auditor)	Treasurer	5 Years
8304	Transportation Reports	Trans. Secretary	4 Years**

\*\*Provided Audited.

Schedule Number	Record Title and Description	Retention Period
<u>9000</u>	<u>OTHER</u>	
9101	Personnel Directory Superintendent Secretary	10 Years
9102	Enrollment Record (By Grade and Building) Superintendent Secretary	Permanent***
9202	School Calendars Superintendent Secretary	5 Years
9203	Building, Boiler, Maintenance Reports Business Office and Secretary	2 Years*
9402	Employee Handbooks Superintendent Secretary	Until Superseded
9403	Directives, Standards, Laws for Local, State and Federal Governmental Agencies All Secretaries	Until Superseded
9404	Attendance Records Superintendent Secretary	Until Superseded

\*After end of fiscal year.

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Schedule Number	Record Title and Description	Retention Period
9501	E-Mails: Transient Documents      Sender or Recipient†	Until no longer of administrative value
9601	E-Mails: General Correspondence      Sender or Recipient†	1 Year
9602	E-Mails: Routine Correspondence      Sender or Recipient†	6 Months
9603	E-Mails: Monthly and Weekly Reports      Sender or Recipient†	1 Year
9604	E-Mails: Minutes of Staff Meetings      Sender or Recipient†	2 Years
9701	E-Mails: Executive Correspondence      Sender or Recipient†	2 Years

†The recipient of the e-mail is responsible for preserving e-mails from senders other than District employees.

“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.