

RECORDS RETENTION SCHEDULE

<u>Type</u>	<u>Local Records</u>	<u>State Records</u>	<u>Federal Records</u>
BUSINESS RECORDS			
Accident Reports			
Employee	6 years or term of employment		
Student	6 years after age of majority		
Annual Audit	Permanent	Permanent	
Annual Report (District)	Permanent		
Application for Federal Grants			5 years
Architectural Plans	Permanent		
Engineering Surveys			
Asbestos Removal			
Bank Deposit Slips	Keep until Audit		
BLS Labor – Monthly			1 year
Bond Issue Materials	Permanent	Permanent	
Budgets	6 years	6 years	
District			
SAU			
Worksheets	1 year	1 year	
Child Labor Permits	1 year	1 year	
Class Observation Forms	1 year		
Contracts	1 year (should keep a sample permanently)		
Aides			
Custodial			
Extra-Curricular			
Rental Agreements			
Secretarial			
Teacher			
SAU Office			
Certified Educator	Permanent		
Collective Bargaining Agreements	Permanent		
Correspondence for Businesses	4 years	4 year	
Credit Union Applications	1 year	4 years	4 years
Criminal Records Check Log (NH and Federal)	Permanent		
Deeds	Permanent		
District Meeting Minutes and Warrants	Permanent		



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BUSINESS RECORDS (continued)			
Enrollment Records			
Resident Pupil Membership	14 years		
Fall Reports A-12-A	Permanent		
Pupil Registers	Permanent		
School Opening Reports	3 years		
Statistical Report A-3	Permanent		
FICA Reports – Monthly		6 years	
Quarterly Form 941			6 years
Fixed Trip Requests/Confirmation	1 year		
Fixed Assets Schedule	Permanent/as updated		
Form C-2 Unemployment	6 years		
Wage Report (DES 100)			
Invoices	Until audit		
Job Orders	1 year		
Ledger/Journals	6 years		6 years
MS-22 Budget Form	6 years	6 years	
MS-23 Budget Form	6 years	6 years	
MS-25 Financial Report	6 years	6 years	
Medical Benefits Application	1 year		
Monthly Reconciliations	1 year		
Monthly Financial Status	1 year		
Reports by Building			
Minutes of Board Meetings	Permanent		
Property Inventories and Record	6 years		
Cards			
Purchase Orders	Until audit		
Request for Payment Vouchers	Until audit		
Requisitions	Until audit		
Retirement Reports – Monthly	1 year	1 year	
School District Warrants	1 year	1 year	
Special Trip Requests	1 year	1 year	
Special Trip Confirmation	1 year	1 year	
Supply Orders	1 year	1 year	
Student Activities Records	Until audit	Until audit	
Telephone Log Sheets	1 year	1 year	
Time Cards	5 years		5 years
Bus Drivers			
Custodial			



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BUSINESS RECORDS (continued)			
Secretarial			
Substitute Teacher Pay Slips			
Other			
Transportation Reports	1 year	1 year	
Travel Reimbursement	Until audit	Until audit	
Treasurer's Receipts	6 years		
Cancelled Checks			
Treasurer's Reports	6 years	6 years	
Voucher Manifests	Until audit	Until audit	
Work Orders	1 year	1 year	
W-2's Yearly			6 years
W-4's Withholding Exemption Certificate			6 years
W-9's			6 years
941-E Quarterly Taxes			6 years
Federal Project Papers		5 years after submission of final audit report and documentation for expenditures, unless there is an ongoing audit taking place.	
Form 1			
Form 1-A			
Form 2			
Form 3			
Form 3-A			
Form 4 Quarterly			
PERSONNEL RECORDS			
Applications	3 years, or if employed, term of employment		
Employment			
Not Employed			
Interview Documents			
Letters of Recommendation			
Transcripts			
Attendance Records	1 year		
Leaves			
Request for Leaves			
Class Observation Forms	1 year		
Criminal Records Check	Term of employment		
Civil Rights Forms			6 years
Dues Authorization	Term of employment		
Evaluations	Term of employment		



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PERSONNEL RECORDS (continued)			
HIPAA Documentation	6 years		
Medical Benefits Application	Term of employment		
Medical Examinations	Term of employment		
Miscellaneous Correspondence for Personnel	4 years		
Record of Leave Superintendent	1 year		
Re-employment Letter of Assurance to Employees	1 year		
Retirement Applications	1 year	1 year	
Staff Development Plan	Term of Employment		
Substitute Lists	6 years		
Teachers' Record Cards	Term of employment		
Teachers' Master Contract	Length of Contract (suggest you keep one copy permanently)		
Termination Forms	6 years		
STUDENT RECORDS			
Early Release Forms	1 year		
Emergency Procedure Form	1 year		
Examples of Student's Work	1 year		
Health and Physical Records Shot Record	Term of enrollment		
National Honor Society Application and/or Awards	1 year		
Permanent Records Cards Progress Attendance Test Scores (Standardized) Academic	Permanent		
Miscellaneous Evaluation Material	Term of enrollment		
Co- and Extra-Curricular Activities	Term of enrollment		
Anecdotal Records Disciplinary Reports Medical Reports (Doctor) Excuses (Parental) Insurance Forms	Term of enrollment		



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STUDENT RECORDS (continued)			
Post High School Placement Information and Follow-up	6 years		
Registration Form	Term of enrollment		
Applications for Free Lunch	6 years		
INTERNAL RECORDS			
Child Abuse Reports/Allegations	Permanent		
Criminal Investigation	Permanent		
Criminal Records Check			
Unsuccessful/Unfavorable	1 year		
Personnel Investigations	Permanent		
Sexual Harassment	Permanent		
SPECIAL NEEDS STUDENT RECORDS			
Index of Documents	As a minimum, these records for special needs students should be kept as long as the student is in a program and there is a district liability for the education of the student. Given court decisions that are retroactive, it might be prudent to preserve for at least six years after graduation or program completion (approximately age 27).		
Log of People who have received material in each folder			
Notification to Parent of Meeting to discuss the student's program with placement team			
Permission to Test Form			
Student Release From Diagnostic Form			
Accumulation of Data			
Psychological Exams			
Learning Disabilities Tests			
Team Meeting Notes			
Spedis Forms			
IEP's			
Teacher/Student Comments			
Correspondence			
Out-of-District Program Reports			
VOCATIONAL EDUCATION			
AVI Forms	1 year		
Center Regional Contracts	20 years		
Equipment Inventories	6 years		
Federal Forms			6 years

