

SCHEDULE OF RECORDS RETENTION AND DISPOSITION

Approved April 4, 2008

Schedule Number	Record Title and Description	Person Responsible	Retention Period	For use by Auditor of State or OHS_LGRP
1000	<u>BOARD AND ADMINISTRATIVE RECORDS</u>			
1101	Minutes	Treasurer	Permanent	
1101.1	Audio Tapes	Treasurer	2 Years	
1102	Blue Prints, Plans, Maps	Business Manager & Secretary	Permanent	
1103	Deeds, Easements, Leases	Treasurer	Permanent	
1104	Board Policy Books and Other Adopted Policies	Superintendent & Secretary	1 Year after Superseded	
1105	Administrative Regulations	Superintendent & Secretary	1 Year after Superseded	
1106	Court Decisions	Treasurer	Permanent	
1107	Claims and Litigation	Treasurer	Permanent	
1201	Elections	Supt/Treasurer	10 Years	
1202	Record Disposal Forms (RC-3)	Data Manager	10 Years	
1203	Bargaining Agreements	Superintendent	10 Years after Expiration	
1204	Budget Policy Files	Treasurer	5 Years	
1301	Worker's 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 Year	
1305	Agendas	Treasurer	1 Calendar Year**	
1401	Adopted Courses of Study	Executive Director of Instrucion & Secretary	Until Superseded	

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1402	Adopted Special Education Programs	Director of Special Education & Secretary	Until Superseded	
1403	Adopted Special Programs	Director of Special Education & Secretary	Until Superseded	
2000	<u>EMPLOYEE RECORDS</u>			
	(Employee files include employment applications, resumes, contracts/salary notices, evaluations, personnel actions, absence certification, transcripts, and any other documents which become part of the file.)			
2101	Certified Active Employees	Asst. Supt. & HR Secretary	Permanent	
2102	Classified Active Employees	Asst. Supt. & HR Secretary	Permanent	
2103	Certificated Inactive Employees	Asst. Supt. & HR Secretary	Permanent***	
2104	Classified Inactive Employees	Asst. Supt. & HR Secretary	Permanent***	
2105	Civil Rights, Civil Service and Disciplinary Reports	Asst. Supt. & HR Secretary	Permanent***	
2107	Retirement Letters	Asst. Supt. & HR Secretary	Permanent***	
2108	Substitute Records	Asst. Supt. & HR Secretary	25 Years	
2301	Employee Contracts	Treasurer	4 Years after termination from employment.	
2302	Professional Conference Applications	Executive Director of Instrucion & Secretary	2 Years**	
2303	Irregular Employee Contracts(Substitutes, etc.)	Treasurer	4 Years after contract expires	
2304	Unemployment Claims	Treasurer	5 Years	

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2305	Unemployment	Treasurer	5 Years	
2306	Applications (not hired)	Asst. Supt. & HR Secretary	2 Years**	
2307	Schedules of Employees	Asst. Supt. & HR Secretary	Fiscal Year plus 2 Years	
2308	Student Helper Applications	Building Secretary	2 Years	
2309	Teacher Personnel Reports (internal)	Asst. Supt. & HR Secretary	Fiscal Year plus 1 year	
2310	I-9 Immigration Verification Forms	Asst. Supt. & HR Secretary	Termination of Employment plus 1 year	
2401	Job Description	Asst. Supt. & HR Secretary	Retain until Superceeded or Obsolete	
3000	<u>STUDENT RECORDS</u>			
3101	Student Record Folders, Enrollment/Withdrawal Information, Grades/Transcripts, Activities Records, Attendance Records, Individual Test Results, Standardized, Competency/Proficiency, Aptitude, Intervention Records, Foreign Exchange Records, Suspension/Expulsions, Home Schooled Student Records	Building Secretary	Permanent****	
3102	Office Record Card (K-9)	Building Secretary	Permanent****	
3103	Cosmetology Records	Vocational Secretary	Permanent****	
3201	Health/Medical Records, Visual Screenings, Hearing Screenings, Immunization Records	Building Nurse	7 Years after Graduation	
3202	Discipline Records, Letters to Parents, Office Discipline	Asst. Principal Secretary	1 Year after Student leaves school	
3203	Psychological Records (Restricted)	Director of Special Education & Secretary	Permanent****	

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3204	Child Abuse/Neglect Referral Letters	Building Secretary	Through Graduation	
3301	Teacher Grade Books/Records	Building Secretary	3 Years**	
3302	Pre-School Screening Profiles	Director of Special Education & Secretary	3 Years	
3303	Age and Schooling Records (Work Permits)	Building Secretary	3 Years	
3304	Student Accident Reports	Building Nurse	5 Years provided no action pending	
3305	Individual Educational Plan (IEP)	Director of Special Education & Secretary	Permanent****	
3306	Free and Reduced Lunch Applications	District Food Service Manager	4 Years	
3401	Emergency Information	Building Secretary	Until Superseded	
4000	<u>BUILDING RECORDS</u>			
4202	Tornado and Fire Drill Records	Building Secretary	1 Year*	
4203	Building Health Inspections	Building Secretary	2 Years*	
4301	Student Activity Records	Building Secretary	2 Years**	
	Pay-In Forms			
	Pay-Out Forms			
	Account Forms/Dist.			
	Budget Forms			
	Requisitions			
	Purchase Orders			
	Ticked Sale Report			
4302	Receipts/Deposit Slips	Building Secretary	4 Years**	
4303	Budget/Appropriation Records	Building Secretary	4 Years**	
4304	Requisitions/Purchase Orders	Building Secretary	10 Years**	
4401	Textbook Inventories	Building Secretary	Until Superseded	

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4402	Supplies Inventory	Building Secretary	Until Superseded	
4403	Student Handbooks	Building Secretary	Until Superseded	
5000	<u>CENTRAL DEPARTMENTAL RECORDS</u>			
	<u>Administrative Offices</u>			
5201	School Calendars	Supt. Secretary	5 Years	
5301	Repair, Installation and Maintenance Records	Business Manager & Secretary	4 Years**	
5302	Prevailing Wage Records	Business Manager & Secretary	4 Years**	
5303	Rental Information (Use of Facilities)	Business Manager & Secretary	4 Years**	
5304	Work Orders	Business Manager & Secretary	4 Years**	
5305	Environmental Reports and Data (asbestos, etc.)	Business Manager & Secretary	4 Years**	
5306	Vandalism Reports	Business Manager & Secretary	4 Years**	
5307	Student Activity Purpose Clauses	Business Manager & Secretary	4 Years**	
5308	Sales Potential Forms (Student Activities)	Treasurer	4 Years**	
5309	Bids and Specifications (Unsuccessful)	Business Manager & Secretary	1 Year**	
5310	Bids and Specifications (Successful)	Business Manager & Secretary	4 Years after completion of project**	
5311	Contractor Files (Resolutions, additions, drawings, etc)	Business Manager & Secretary	Until project complete if no action pending**	
5401	Preventive Maintenance Reports	Business Manager & Secretary	Fiscal Year plus 2 Years	

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5402	Warranty/Guarantee	Business Manager & Secretary	Life/Warranty of Equipment	
5403	Plant and Equipment Inventory	Treasurer	Until Superceded**	
5404	Textbook/Workbook Inventory	Executive Director of Instruction & Secretary	Until Superceded**	
5405	Supplies Inventory	Business Manager & Secretary	Until Superceded**	
<u>Special Education Department</u>				
5221	Special Education Tutoring Reports	Director of Special Education & Secretary	10 Years	
5222	Individual Educational Plan (IEP)	Director of Special Education & Secretary	Permanent****	
5223	Psychological Records (Restricted)	Director of Special Education & Secretary	Permanent***	
<u>Transportation Department</u>				
5340	Driver Physical	Transportation Supervisor	2 Years after termination	
5341	Fuel Consumption Data	Transportation Supervisor	4 Years**	
5342	Transportation Records	Transportation Supervisor	4 Years**	
5343	Field Trip Forms and Volunteer Driver Forms	Transportation Supervisor	Fiscal Year plus 2 Years	
5441	Accident Reports	Transportation Supervisor	3 Years provided no action pending	
5442	Vehicle Registration	Transportation Supervisor	Life of Vehicle	
5443	Vehicle License	Transportation Supervisor	1 Year after termination	

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5445	Driver Certifications	Transportation Supervisor	1 Year after termination	
5446	Supplies Inventory	Transportation Supervisor	Until Superseded**	
5447	Vehicle Defect Report	Transportation Supervisor	Life of Vehicle	
<u>Food Services Department</u>				
5561	Food Service Records Menus Food Production Milk Sold Students Served	Food Service Manager	4 Years**	
5562	Lunchroom Records Cash Register Tapes Cashier's Daily Reports	Food Service Manager	4 Years**	
5563	Lunchroom Reports (Free and Reduced)	Food Service Manager	4 Years**	
5564	Inventories	Food Service Manager	Until Superseded**	
5565	Lunchroom License	Food Service Manager	1 Year after expiration	
<u>6000</u>	<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	

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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**	
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**	
6214	Travel Expense Voucher	Treasurer	10 Years**	
6215	Tax Anticipation Notes (Records borrowing against future tax collections)	Treasurer	10 Years**	
6216	State Reimbursement Settlement Sheets	Treasurer	5 Years**	

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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	Canceled Checks and Bank Settlements	Treasurer	4 Years**	
6302	Publication Notice	Treasurer	4 Years**	
6303	Tuition Fees and Payments	Treasurer	4 Years**	
6304	School Finance (S.F.) Monthly Statements	Treasurer	4 Years**	
6305	Investment Records (May include individual record of investments, bank confirmations, 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-in, 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)	Business Manager & Secretary	1 Year**	
6312	Bids and Specifications (Successful)	Business Manager & Secretary	4 Years after completion of project**	
6313	Receipt Books	Treasurer	4 Years**	
6314	Extra Trip Records	Treasurer	4 Years**	
6315	Monthly Financial Reports	Treasurer	4 Years**	

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6316	Accounting Data	Treasurer	4 Years**	
6317	Service Contracts	Treasurer	4 Years**	
6318	State Subsidy Reports (Applications for Driver Education, Pupil Transportation, Special Education, etc.)	Treasurer	3 Years**	
6319	Delivery/Packing Slips	Treasurer	1 Year**	
6401	Requisitions	Treasurer	1 Year*	
7000	<u>PAYROLL RELATED</u>			
7001	Payroll Ledgers	Treasurer	Permanent****	
	Bi-Weekly Payroll Reports, Quarterly Payroll Reports			
7102	Earning Registers	Treasurer	Permanent****	
	By Staff Members			
	By Calendar Year			
7103	Monthly Payroll Reports (Leave Usage and Accumulation, Retirement Service, etc.)	Treasurer	Permanent****	
7201	Bureau of Employment Service Quarterly Reports	Treasurer	7 Years	
7301	W-2's and 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**	
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 Listing	Treasurer	4 Years**	
7308	Payroll Calculations	Treasurer	4 Years**	

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7309	State Teachers System and School Employees Retirement System Waivers	Treasurer	Permanent****	
7310	State 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 Folders/Reports	Treasurer	4 Years**	
7314	Employee Request and/or Authorization for Leave Forms (Sick, Vacation, Personal, or other leave)	Treasurer	4 Years**	
7315	Deduction Reports (Voluntary Payroll Deductions)	Treasurer	4 Years**	
7316	Employee Vacation/Sick Leave Records	Treasurer	4 Years**	
7317	Time Sheets	Treasurer	6 Years**	
7318	Overtime Authorization	Treasurer	6 Years	
7319	Employee Insurance Bills (Medical, Dental, Life, etc.)	Treasurer	4 Years**	
7323	Paycheck Register	Treasurer	4 Years**	
7324	Payroll Bank Statement	Treasurer	4 Years**	
7401	Deduction Authorization	Treasurer	Until Superseded or Employee Terminated	
8000	REPORTS			
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	

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8205	Special Education (S.E.) Reports - Annual	Director of Special Education & Secretary	7 Years	
8206	Vocational Education (V.E.) Reports- Annual	N/A	5 Years	
8207	Ohio Common Core Data (OCCD) Reports	Supt. Secretary	5 Years	
8208	Driver's Education Reports	N/A	5 Years	
8209	Ohio Department of Education (ODE) Reports	EMIS Coordinator	5 Years	
8211	Civil Rights Reports	District Registrar/Data Manager	Permanent****	
8212	Title IX Reports	EMIS Coordinator	10 Years	
8213	SM-1 & SM-2 (Annual and Quarterly)	Treasurer	10 Years	
8214	State Minimum Standards	Executive Director of Instruction & Secretary	10 Years	
8301	Personnel State Reports (Currently SF-1, CS-1)	Treasurer	4 Years**	
8302	Worker's Comp Wage Reports (Co. Auditor)	Treasurer	5 Years	
8303	Bank Balance Certification (Co. Auditor)	Treasurer	5 Years	
8304	Transportation Reports	Transportation Supervisor	4 Years**	
9000	<u>OTHER</u>			
9101	Personnel Directory	Asst. Supt. & HR Secretary	10 Years	
9102	Enrollment Record (by grade and building)	District Registrar/Data Manager	Permanent****	
9202	School Calendars	Supt. Secretary	5 Years	

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9203	Building, Boiler, Maintenance Reports	Business Manager & Secretary	2 Years*	
9402	Employee Handbooks	Asst. Supt. & HR Secretary	Until Supreceded	
9403	Directives, Standards, Laws for Local, State and Federal Government Agencies	All Secretaries	Until Supreceded	
9404	Attendance Records	Bldg Secretaries	Until Supreceded	

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