

**BOARD DOCUMENTS RETENTION SCHEDULE**

| <b>Description of Record</b>                                   | <b>Retention Deadline</b>   | <b>Destruction Method</b>          | <b>Record Administrator</b> |
|--|---|------------------------------------|-----------------------------|
| 1099s  | 13 yrs after CFY  | Shred                              | Business Manager            |
| Annexation, Reorganization, and Dissolution Committee Material | Permanently   | n/a; file copy with state archives | Business Manager            |
| Annexation, Reorganization, and Dissolution Plans/Agreements   | Permanently   | n/a; file copy with state archives | Business Manager            |
| Board correspondence   | 3 yrs after CFY   | Recycle                            | Business Manager            |
| Board Election Ballots (including absentee)                    | Retain one copy permanently; ballots completed by voters retain 22 months   | Shred                              | Business Manager            |
| Board Election Notices   | 45 days after election  | Recycle                            | Business Manager            |
| Board minutes  | Permanently   | n/a                                | Business Manager            |
| Budgets  | 10 yrs from date of approval  | Recycle                            | Business Manager            |
| Certificate of election  | Retain for 10 yrs after CFY   | Send to state archives             | Business Manager            |
| Committee Meeting Minutes                                      | Retain for 10 yrs after CFY   | Send to state archives             | Business Manager            |
| Election Official Oaths  | 45 days after election  | Recycle                            | Business Manager            |
| Executive Session Tapes  | Minimum of 6 months; 6 yrs if the executive session was related to contract negotiations, nonrenewal, discharge, or expulsion | Destroy                            | Business Manager            |
| Joint Powers Agreements  | Permanently   | n/a                                | Business Manager            |
| Meeting Agendas  | Retain for 10 yrs after CFY   | Send to state archives             | Business Manager            |
| Meeting Packets  | Retain for 10 yrs after CFY   | Send to state archives             | Business Manager            |
| New Board Member Training Verification                         | Term of office +6 yrs   | Recycle                            | Business Manager            |
| Oath of Office   | Retain for entire term of office + 6yrs   | Send to state archives             | Business Manager            |
| Petitions: Recall and Election                                 | 10 yrs from date approved   | Send to state archives             | Business Manager            |
| Policies related to board operations                           | Retain for life of policy plus 6 yrs once amended or rescinded  | Recycle                            | Business Manager            |

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|-----------------------------------|------------------------------|------------------------|----------------------|
| Poll books                        | 10 yrs from date of election | Send to state archives | Business Manager     |
| Poll tallies                      | 10 yrs from date of election | Send to state archives | Business Manager     |
| Statement of Interest (SFN 10172) | 10 yrs after CFY             | Recycle                | Business Manager     |
| Travel Reimbursement Log/Reports  | CFY +4 yrs                   | Shred                  | Business Manager     |

### HR RECORDS RETENTION SCHEDULE

| Description of Record                               | Retention Deadline  | Destruction Method | Record Administrator                                 |
|---|---|--------------------|--|
| 1099s   | 13 yrs after CFY  | Shred              | Business Manager                                     |
| 403 B Annuity Billings/ Payment Confirmation        | 5 yrs after separation  | Shred              | Business Manager                                     |
| 941 Federal Tax Form/EFTPS                          | 5 yrs after separation of all employees on report                                     | Shred              | Business Manager                                     |
| Absence Log   | 5 yrs after separation  | Shred              | Business Manager                                     |
| Academic Records/ Transcripts                       | Until updated; destroy upon separation  | Shred              | Business Manager or HR Director                      |
| Annual Payroll Report (for Annual Financial Report) | 5 yrs from date created   | n/a                | Business Manager                                     |
| Awards/Honors records                               | 6 yrs after separation  | Shred              | Business Manager                                     |
| Benefits Bills (e.g., BCBS bill, AFLAC bill)        | 6 yrs after plan yr   | Shred              | Business Manager                                     |
| Certificate of Fitness for Duty (Bus Drivers)       | Until new certificate is received; upon separation retain final certificate for 6 yrs | Shred              | HR Director, Facilities Manager, or Business Manager |
| Certificates of Insurance                           | 6 yrs after final action  | Shred              | Business Manager                                     |
| Check Register                                      | 6 yrs after created   | n/a                | Business Manager                                     |

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| <b>Description of Record</b>                       | <b>Retention Deadline</b>   | <b>Destruction Method</b>          | <b>Record Administrator</b>                |
|--|---|------------------------------------|--|
| Child Support Enforcement Reporting                | 5 yrs after separation  | Shred                              | Business Manager                           |
| Classroom Observation Notes                        | 2 school yrs; if used for purposes of nonrenewal, retain 6 yrs after separation | Recycle                            | Employee's supervisor (principal or supt.) |
| COBRA Forms  | 6 yrs after final action  | Shred                              | Business Manager                           |
| COBRA payments                                     | 6 yrs after final action  | Shred                              | Business Manager                           |
| Cover Letters                                      | 6 yrs after hiring decision   | Recycle or shred (if contains ss#) | HR Director or Business Manager            |
| Credit Checks                                      | 2 yrs after selection process   | Shred                              | Superintendent                             |
| Criminal History Records                           | 6 yrs after hiring decision (if not hired); 6 yrs after separation if hired     | Shred                              | Record Adjudicator                         |
| Deductions Register (by Deduction and by Employee) | 5 yrs after separation  | Shred                              | Business Manager                           |
| Direct Deposit Information and Authorization Forms | Duration of employment or until new authorization forms are provided            | Shred                              | Business Manager                           |
| Direct Deposit Register                            | CFY +4 yrs  | Shred                              | Business Manager                           |
| Driver's License Copy                              | 1 yr after date of termination  | Shred                              | Business Manager                           |
| Driving Record Check                               | Until updated or 6 yrs  | Shred                              | Business Manager                           |
| Drug Testing                                       | 7 yrs after separation  | Shred                              | HR Director or building administrator      |
| Early Retirement Agreement                         | 6 yrs after final payment made under agreement                                  | Shred                              | Business Manager                           |
| Employee Contact Information Form                  | Duration of recall rights (for RIF'd teacher); 1 yr after updated or separation | Shred                              | HR Director or Business Manager            |
| Employee Lifetime Wages Report                     | 6 yrs after separation  | n/a                                | Business Manager                           |
| Employee Work Agreement                            | 6 yrs after separation  | Shred                              | HR Director or Superintendent              |
| Employment Contracts                               | 6 yrs after separation  | Shred                              | Business Manager                           |

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|--|---|---------------------------|--|
| Employment History Records (dates of employment, pay changes, dates of actions taken such as transfers, promotions, disciplinary measures) | 50 yrs after separation   | Shred                     | HR Director or Business Manager                  |
| Evaluations  | 6 yrs after separation  | n/a                       | HR Director or Business Manager                  |
| Exit Checklist   | 6 yrs after separation  | Shred                     | HR Director                                      |
| Exit Interview Form  | 6 yrs after separation  | Shred                     | HR Director                                      |
| Flex Benefit/125/ Cafeteria Plan Application Form  | 5 yrs after separation  | Shred                     | Business Manager                                 |
| Flex Benefit/125/ Cafeteria Plan Billings  | 6 yrs after plan's termination                                  | Shred                     | Business Manager                                 |
| FMLA Forms   | 5 yrs after separation  | Shred                     | Business Manager or HR Director                  |
| Garnishments   | 5 yrs after separation  | Shred                     | Business Manager                                 |
| Handbook Receipt Verification  | 6 yrs after separation  | Recycle                   | Business Manager or HR Director                  |
| I-9  | 4 yrs after CFY or 3 yrs after separation (whichever is longer) | Shred                     | Business Manager                                 |
| Improvement Plans  | 6 yrs after separation  | Shred                     | HR Director                                      |
| Insurance Applications (Medical, Vision, Aflac, Dental, Etc.)  | 5 yrs after separation  | Shred                     | HR Director or Business Manager                  |
| Insurance Monthly Statements   | 6 yrs from date paid  | Shred                     | HR Director or Business Manager                  |
| Interview Notes  | 6 yrs after hiring decision                                     | Shred                     | HR Director                                      |
| Interview Questions  | 6 yrs after hiring decision                                     | Recycle                   | HR Director                                      |
| Job Advertisement  | 6 yrs after hiring decision                                     | Recycle                   | HR Director, Superintendent, or Business Manager |
| Job Application  | 6 yrs after hiring decision                                     | Shred                     | HR Director or Business Manager                  |
| Job Description  | 6 yrs after separation  | Recycle                   | HR Director                                      |

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|--|--|---------------------------|---|
| Job Service New Hire Report                                | 1 yr after submission  | Shred                     | HR Director/<br>Business Manager            |
| Leave Balance Reports                                      | 3 yrs from date of creation  | Shred                     | Business Manager or HR Director             |
| Leave Request Forms (other than FMLA) (includes sick bank) | 5 yrs after separation   | Shred                     | Business Manager                            |
| Letter of Resignation                                      | 6 yrs after separation   | Shred                     | Superintendent Secretary                    |
| Medical Records  | 6 yrs after separation   | Shred                     | Hr. Director or Business Manager            |
| Medical Release to Return to Work                          | 6 yrs after separation   | Shred                     | HR Director or Business Manager             |
| Negotiated Agreements (including Salary Schedules)         | 6 yrs after separation of last employee covered by the agreement (e.g., last teacher hired in 1980 retires in 2015; retain 1980 negotiated agreement until 2021) | Recycle                   | Business Manager                            |
| Nonrenewal Notices   | 6 yrs after separation   | Recycle                   | Business Manager or HR Director             |
| Offer of Employment Letter                                 | 6 yrs after separation   | Shred                     | Business Manager or HR Director             |
| Orientation Checklist                                      | 6 yrs after separation   | Recycle                   | HR Director, Business Manager, or Principal |
| Pay Period Entries for Taxable Reimbursement               | 5 yrs from date created  | Shred                     | Business Manager                            |
| Payout of Remaining Leave upon Separation                  | 5 yrs after separation   | Recycle                   | Business Manager                            |
| Payroll Register Totals                                    | 5 yrs after created  | n/a                       | Business Manager                            |
| Payroll Registers  | 5 yrs after all employees listed have separated employment   | n/a                       | Business Manager                            |

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|---|--|--|--|
| Payroll Schedules   | 5 yrs after separation of last employee covered by the schedule (e.g., last employee hired in 1980 retires in 2015; retain 1980 payroll schedule until 2020) | n/a  | Business Manager                                 |
| PERS Defined Benefit Retirement Membership Application (SFN 2561)     | 1 year after separation  | Contact PERS to ensure info is on file, then shred | Business Manager                                 |
| PERS Designation of Beneficiary for Group Retirement Plan (SFN 25060) | 1 year after separation  | Contact PERS to ensure info is on file, then shred | HR Director                                      |
| PERS Monthly Report of Contributions                                  | 1 year after separation  | Shred  | Business Manager                                 |
| Physical Exam Records   | Until updated or 6 yrs after separation  | Shred  | HR Director                                      |
| Policies Governing Personnel  | 6 yrs after separation of last employee covered by the policy (e.g., last employee hired in 1980 retires in 2015; retain 1980 policies until 2021)           | Recycle  | Superintendent                                   |
| Pre-Observation Teacher Form  | 2 school yrs; if used for purposes of nonrenewal, retain 6 yrs after separation  | Shred  | Principal or supervisor                          |
| Reference Check Information/ Notes (e.g., Verification of Employment) | 6 yrs after decision to hire   | Shred  | Business Manager                                 |
| Reference Letters/Checks  | 6 yrs after decision to hire   | Shred  | Business Manager                                 |
| Rejection Letter (Employment)   | 6 yrs after issuing  | Recycle  | HR Director, Business Manager, or Superintendent |
| Resumes   | 6 yrs after decision to hire   | Shred  | HR Director, Business Manager or Superintendent  |
| Social Security Card (copy)   | 1 year after separation  | Shred  | Business Manager                                 |
| Social Security Verification  | 6 yrs after separation   | Shred  | Business Manager                                 |
| State Income Tax Quarterly Reports                                    | 13 yrs after CFY   | Shred  | Recycle  |
| Tax Deduction Register  | 13 yrs after CFY   | Shred  | Shred  |
| Teacher License (Copy)  | Until updated and 1 yr after separation  | Shred  | Business Manager or HR Director                  |

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|---|-------------------------|--|---------------------------------|
| TFFR Member Action Form (SFN 5098)                    | 1 year after separation | Contact TFFR to ensure info is on file, then shred     | Business Manager                |
| TFFR Member Certification (SFN 11732)                 | 1 year after CFY        | Shred  | Business Manager                |
| TFFR Monthly Report of Contributions                  | 5 yrs after created     | Contact TFFR to ensure info is on file, then shred     | Business Manager                |
| TFFR Notice of Termination (SFN 17144)                | 5 yrs after separation  | Contact TFFR to ensure info is on file, then shred     | Business Manager                |
| TFFR Salary Verification— Pending Retiree (SFN 59158) | 1 yr after separation   | Contact TFFR to ensure info is on file, then shred     | Business Manager                |
| Timecard Reports                                      | 5 yrs after created     | Shred  | Business Manager                |
| Timecards   | 6 yrs after separation  | Recycle  | Business Manager or HR Director |
| Training Records                                      | 6 yrs after separation  | Shred  | HR Director or Business Manager |
| Travel Reimbursement Log/Reports                      | CFY +4 yrs              | Shred  | Business Manager                |
| U.S. Department of Labor Monthly Report               | 1 yr after created      | Shred  | Business Manager                |
| Unemployment Quarterly Reports                        | 5 yrs from date created | Shred  | Business Manager                |
| Union Dues List                                       | 5 yrs from date created | Shred if contains confidential info; otherwise recycle | Business Manager                |
| Verification of Professional Development              | 6 yrs after separation  | Shred  | Superintendent                  |
| Verification of Wages to Employees                    | 6 yrs after separation  | Shred  | Business Manager                |
| Voluntary Salary Deduction/ Reduction Agreements      | 5 yrs after separation  | Shred  | Business Manager                |

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|--|---------------------------|---------------------------|--------------------------------------|
| W-2 Forms                                | 13 yrs after CFY          | Shred                     | Business Manager                     |
| W-4 Forms                                | 13 yrs after CFY          | Shred                     | Business Manager                     |
| W-9 forms                                | 13 yrs after CFY          | Shred                     | Business Manager                     |
| Wage and Batch Totals Listing Deductions | CFY +4 yrs                | Shred                     | Business Manager                     |
| Waiver of Insurance                      | 5 yrs after separation    | Shred                     | Business Manager                     |
| Warnings/Write Ups                       | 6 yrs after separation    | Shred                     | HR Director or employee's supervisor |
| WSI Annual Report                        | CFY +2 yrs                | Shred                     | Business Manager                     |
| WSI Claims                               | 4 yrs after final action  | Shred                     | Business Manager                     |

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