

12-29-14

SCHEDULE OF RECORDS RETENTION AND DISPOSITION

(1) TO: Howland Local Schools Records Commission, Tel. No.: 330-856-8207

8200 South St
(ADDRESS)

Warren
(CITY)

HISTORY CONNECTION
44484
(ZIP CODE)

Trumbull
(COUNTY)

(2) FROM:

(POLITICAL SUBDIVISION NAME)

NOV 23 2014

(UNIT)

Paul Purson
(SIGNATURE OF RESPONSIBLE OFFICIAL)

STATE ARCHIVAL
GOVERNMENT RECORDS
(TITLE)

11/25/2014
(DATE)

(3) CERTIFICATION: I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and passed the retention schedules contained on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these record series from being destroyed, transferred, or otherwise disposed of in violation of this schedule and that no record will be knowingly disposed of which pertains to any pending case, claim, action or request. This was approved on November 24, 2014 as reflected by the minutes kept by this commission.

Chairman, Records Commission:

Paul Purson
Signature

11-25-14
Date

(4) Subject to selection upon receipt of a Certificate of Records Disposal (RC-3):

K. L. A.
For the Ohio Historical Society

12/9/2014
Date

Approved by the Ohio Auditor of State:

Martin E. Mueh
For the Ohio Auditor of State

12-23-14
Date

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|------------------------|---|-------------------------|--|
| 1000 | <u>BOARD AND ADMINISTRATIVE RECORDS</u> | | |
| 1101 | Minutes | Permanent | RC-3 Required |
| 1101.1 | Audio Tapes | 2 Years | |
| 1102 | Blue Prints, Plans, Maps | Permanent | RC-3 Required |
| 1103 | Deeds, Easements, Leases | Permanent | RC-3 Required |
| 1104 | Board Policy Books and Other Adopted Policies | 1 year after superceded | |
| 1105 | Administrative Regulations | 1 year after superceded | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM: _____
 (POLITICAL SUBDIVISION NAME) _____ (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State |
|---------------------------|--|---|--|
| 1106 | Court Decisions | Permanent | Or OHS-LGRP RC-3 Required |
| 1107 | Claims and Litigation | Permanent | RC-3 Required |
| 1201 | Elections | 10 Years | |
| 1202 | Record Disposal forms (RC-3) | 10 Years | |
| 1203 | Bargaining Agreements | 10 Years after Expiration | |
| 1204 | Budget Policy Files | 5 Years | |
| 1301 | Worker's Compensation Claims | 10 Years after Financial Payment made | |
| 1302 | Bank Depository Agreements | 4 Years after Completion | 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. |
| 1303 | Organization Reports | 2 Years** | |
| 1304 | Board Meeting Notes | 1 Year | |
| 1305 | Agendas | 1 Calendar Year** | |
| 1401 | Adopted Courses of and Secretary | Until Superseded | |
| 1402 | Adopted Special Education Programs | Until Superseded | |
| 1403 | Adopted Special Programs | Until Superseded | |
| | *After end of fiscal year ** Provided Audited | | |

SCHEDULE OF RECORDS RETENTION AND DISPOSITION CONTINUATION SHEET

FROM: _____
(POLITICAL SUBDIVISION NAME)
(UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|--|--|---|
| <u>2000</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 | Permanent | |
| 2102 | Classified Active Employees | Permanent | |
| 2103 | Certificated Inactive Employees | Permanent*** | |
| 2104 | Classified Inactive Employees | Permanent*** | |
| 2105 | Civil rights, Civil Services and Disciplinary Reports | Permanent*** | |
| 2107 | Retirement Letters | Permanent*** | |
| 2108 | Substitute records | 25 Years | |
| 2301 | Employee Contracts | 4 Years after termination from employment. | |
| 2302 | Professional Conference Applications | 2 Years** | |
| | *After end of fiscal year | | |
| | **Provided Audited | | |
| | ***Hard copy maintained for 3 years after audited- then microfilmed. | | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM : _____
 (POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|---|---|---|
| 2303 | Irregular Employee Contracts (Substitutes, etc.) | 4 Years after contract expires | |
| 2304 | Unemployment Claims | 5 Years | |
| 2305 | Unemployment | 5 Years | |
| 2306 | Applications (not hired) | 2 Years** | |
| 2307 | Schedules of Employees | Fiscal Year Plus 2 years | |
| 2308 | Student Helper Applications | 2 Years | |
| 2309 | Teacher Personnel Reports (internal) | Fiscal Year Plus 1 year | |
| 2310 | I-9 Immigration Verification Forms | Termination of employment plus 1 year | |
| 2401 | Job Descriptions | Retain until Superseded or Obsolete | |
| | ** Provided Audited | | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|--|---|--|
| 3000 | <u>STUDENT RECORDS</u> | | |
| 3101 | Student Record Folders Enrollment/Withdrawl 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 | Permanent*** | |
| 3102 | Office Record Card (K-9) | Permanent*** | |
| 3103 | Cosmetology Records (Vocational) | Permanent*** | |
| 3201 | Health/Medical Records Visual Screening Hearing Screening Immunization Records | 10 Years After Graduation or 21 years of age, whichever comes first | |
| 3202 | Discipline Records Letters to Parents Office Discipline | 1 Year after Student leaves School | |
| 3203 | Psychological Records (Restricted) | Permanent*** | |
| 3204 | Child Abuse/Neglect Referral Letters | Through Graduation | ** Provided Audited *** Hard Copy maintained for 5 years after Student leaves system -then microfilmed. |
| 3301 | Teacher Grade Books/ Records | 3 Years** | |

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CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LRRP |
|---------------------------|--|--|---|
| 3302 | Pre-School Screening Profiles | 3 years | |
| 3303 | Age and Schooling Records (Work Permits) | 3 years | |
| 3304 | Accident Reports | 5 years provided no action pending | |
| 3305 | Individual Educational Plan (IEP) | Permanent | |
| 3306 | Free/Reduced Price Lunch Application | 4 years | |
| 3401 | Emergency Information | Until Superseded | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|--|----------------------------|---|
| 4000 | <u>BUILDING RECORDS</u> | | |
| 4202 | Tornado and Fire Drill Records | 1 year* | |
| 4203 | Building Health Inspections | 2 years* | |
| 4301 | Student Activity Records Pay-in forms Pay-out forms Account forms/Dist. Budget forms Requisitions Purchase orders Ticked sale reports | 2 years** | |
| 4302 | Receipts/Deposit Slips | 4 years** | |
| 4303 | Budget/Appropriation Records | 4 years** | |
| 4304 | Requisitions/ Purchase Orders | 4 years** | |
| 4401 | Textbook Inventories | Until Superseded | |
| 4402 | Supplies Inventory | Until Superseded | |
| 4403 | Student Handbooks | Until Superseded | |
| | *After end of fiscal year ** Provided Audited | | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|---|---|---|
| <u>5000</u> | <u>CENTRAL DEPARTMENTAL RECORDS</u> | | |
| | <u>Administrative Offices</u> | | |
| 5201 | School Calendars | 5 years | |
| 5301 | Repair, Installation and Maintenance Records | 4 years** | |
| 5302 | Prevailing Wage Records | 4 years** | |
| 5303 | Rental Information (Use of Facilities) | 4 years** | |
| 5304 | Work Orders | 4 years** | |
| 5305 | Environmental Reports And Data (asbestos, etc.) | 4 years** | |
| 5306 | Vandalism Reports | 4 years** | |
| 5307 | Student Activity Purpose Clauses | 4 years** | |
| 5308 | Sales Potential Forms (Student Activities) | 4 years** | |
| 5309 | Bids and Specifications (Unsuccessful) | 1 year** | |
| 5310 | Bids and Specifications (Successful) | 4 years after completion of Project** | |
| | ** Provided Audited | | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|---|---|--|
| | <u>Administrative Offices – Continued</u> | | |
| 5311 | Contractor Files (Resolutions, additions, drawings, etc.) | Until Project Complete, if No Action Pending** | |
| 5401 | Preventive Maintenance Reports | Fiscal year Plus 2 years | |
| 5402 | Warranty/Guarantee | Life/Warranty of Equipment | 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. |
| 5403 | Plant and Equipment Inventory | Until Superceded** | |
| 5404 | Textbook/Workbook Inventory | Until Superceded** | |
| 5405 | Supplies Inventory | Until Superceded** | |
| | ** Provided Audited | | |

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CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|---|--|---|
| | <u>Special Education Department</u> | | |
| 5221 | Special Education Tutoring Reports | 10 years | |
| 5222 | Individual Educational Plan (IEP) | Permanent*** | |
| 5223 | Psychological Records (Restricted) | Permanent*** | |
| | <u>Transportation Department</u> | | |
| 5340 | Driver Physical | 2 years after termination | |
| 5341 | Fuel Consumption Data | 4 years** | |
| 5342 | Transportation Records | 4 years** | |
| 5343 | Field Trip forms and Volunteer Driver forms | Fiscal year Plus 2 years | |
| 5441 | Accident Reports | 3 years provided no action pending | |
| 5442 | Vehicle Registration | Life of Vehicle | |
| 5443 | Vehicle License | 1 year after termination | |
| 5445 | Driver Certifications | 1 year after termination | |
| | ** Provided Audited *** Hard copy maintained for 3 years after audited – then microfilmed | | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|--|----------------------------|---|
| | <u>Transportation Department – Continued</u> | | |
| 5446 | Supplies Inventory | Until Superceded** | |
| 5447 | Vehicle Defect Report | Life of Vehicle | |
| | <u>Food Service Department</u> | | |
| 5561 | Food Service Records Menus Food Production Milk Sold Students Served | 4 years** | |
| 5562 | Lunchroom Records Cash Register Tapes Cashier's Daily Reports | 4 years** | |
| 5563 | Lunchroom Reports (Free and Reduced) | 4 years** | |
| 5564 | Inventories | Until Superceded** | |
| 5565 | Lunchroom License | 1 year after expiration | |
| | ** Provided Audited | | |

**SCHEDULE OF RECORDS RETENTION AND DISPOSITION
CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP | |
|---------------------------|---|--|---|----------------------|
| 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 | 5 years** | <p>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.</p> | |
| 6102 | Activity Fund Cash Journal and Ledger | 5 years** | | |
| 6103 | Bond Register | 20 years after issue expires | | |
| 6104 | Securities | Permanent*** | | RC-3 Required |
| 6201 | Investment Ledger | 5 years** | | |
| 6202 | Foundation Distribution | 5 years** | | |
| 6203 | Tax Settlements (Semi-Annual) and Advances | 5 years** | | |
| 6204 | Budgets (Annual) | 5 years** | | |
| 6205 | Insurance Policies | 15 years after Expiration Provided all Claims settled | | |
| | <p>** Provided Audited *** Hard copy maintained for 3 years after audit- then microfilmed</p> | | | |

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CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State of OHS-LGRP |
|---------------------------|---|------------------------------|---|
| 6206 | Contracts | 15 years after Expiration | |
| 6207 | Bonds and Coupons | Until Redeemed** | |
| 6208 | Accounts Payable Ledgers | 5 years** | |
| 6209 | Accounts Receivable Ledgers | 5 years** | |
| 6210 | Budget Work Papers | 5 years** | |
| 6211 | Vouchers, Invoices and Purchase Orders | 5 years** | |
| 6212 | State Program Files Aux. Services, DPPF, Adult Vocational, Excess Lottery, Data Processing, Public/ Private Grants, etc. | 10 years** | |
| 6213 | Federal Program Files Title I,II,III, IV-B IV-C, & VI-B; Chapter 1, 2; Drug Free, etc. | 10 years** | |
| 6214 | Travel Expense Vouchers | 5 years** | |
| 6215 | Tax Anticipation Notes (Records borrowing against future tax collections) | 10 years** | |
| | ** Provided Audited | | |

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FROM: _____
(POLITICAL SUBDIVISION NAME)
(UNIT)

| (6) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|---|-----------------------------|--|
| 6216 | State Reimbursement Settlement Sheets | 5 years** | 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. |
| 6217 | Unemployment Claims | 5 years | |
| 6218 | Employee Bonds, Board Member Bonds | 5 years | |
| 6219 | Certificate of Estimated Resources | 5 years after Expiration | |
| 6220 | Appropriation Resolutions | 5 years | |
| 6222 | Tax Apportionments (Semi-Annual) | 5 years | |
| 6301 | Canceled Checks and Bank Settlements | 4 years** | |
| 6302 | Publication Notice | 4 years** | |
| 6303 | Tuition Fees and Payments | 4 years** | |
| 6304 | School Finance (S.F.) Monthly Statements | 4 years** | |
| 6305 | Investment Records (May include individual Record of investments, bank Confirmations, wire transfers, Copy of CD, etc.) | 4 years** | |
| 6306 | Travel Expense Reports | 5 years** | |
| 6307 | State Sales Tax Reports | 4 years** | |
| | ** Provided Audited | | |

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(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|---|--|---|
| 6308 | Student Activity Fund (Pay-ins, Pay-outs, Receipts/Deposits, Reports) | 4 years** | |
| 6309 | Check Registers | 4 years** | |
| 6310 | Deposit Slips/Cash Proofs | 4 years** | |
| 6311 | Bids and Specifications (Unsuccessful) | 1 year** | |
| 6312 | Bids and Specifications (Successful) | 4 year after completion of project** | |
| 6313 | Receipt Books | 4 years** | |
| 6314 | Extra Trip Records | 4 years** | |
| 6315 | Monthly Financial Reports | 4 years** | |
| 6316 | Accounting Data | 4 years** | |
| 6317 | Service Contracts | 4 years** | |
| 6318 | State Subsidy Reports Applications for SF-6, SF-14, SF-14H, Pupil transportation, Special Education, etc. | 3 years** | |
| 6319 | Delivery/Packing Slips | 1 year** | |
| 6401 | Requisitions | 1 year* | |
| | *After end of fiscal year **Provided Audited | | |

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|---------------------------|--|----------------------------|---|
| <u>7000</u> | <u>PAYROLL RELATED</u> | | |
| 7001 | Payroll Ledgers Bi-Weekly Payroll Reports, Quarterly Payroll Reports | Permanent*** | |
| 7102 | Earnings Registers By Staff Member By Calendar Year | Permanent*** | |
| 7103 | Monthly Payroll Reports Leave usage and Accumulation, Retirement service, etc. | Permanent*** | |
| 7201 | Bureau of Employment Service Quarterly Reports | 7 years | |
| 7301 | W-2's, W-4's (Employer copy) | 6 years and Current** | |
| 7302 | Federal Income Tax (Quarterly/Annual) | 6 years and Current** | |
| 7303 | Ohio Income Tax (Monthly/Annual) | 6 years and Current** | |
| 7304 | City Income Tax (Monthly/Annual) | 6 years and Current** | |
| 7305 | School Income Tax (Monthly/Annual) | 6 years and Current** | |
| 7306 | Payroll Reports Reports used for Each payroll- Computer generated **Provided Audited ***Hard Copy maintained for 5 years, then microfilmed | 4 years** | |

**SCHEDULE OF RECORDS AND RETENTION AND DISPOSTION
CONTINUATION SHEET**

FROM: _____
(POLITICAL SUBDIVISION NAME) (UNIT)

| (5) Schedule Number | (6) Record title and description | (7) Retention Period | (8) For use by Auditor of State or OHS-LGRP |
|---------------------------|---|----------------------------|---|
| 7307 | Payroll Update Listing | 4 years** | |
| 7308 | Payroll Calculations | 4 years** | |
| 7309 | State Teachers System and School Employees Retirement System Waivers | Permanent*** | |
| 7310 | State Employees Retirement System (SERS) Reports | 4 years** | |
| 7311 | State Teachers Retirement System (STRS) Reports | 4 years** | |
| 7312 | Annuity Reports | 4 years** | |
| 7313 | Benefit Folders/Reports | 4 years** | |
| 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** | |
| | ** Provided Audited *** Hard Copy maintained for 5 years, then microfilmed | | |

SCHEDULE OF RECORDS RETENTION AND DISPOSITION CONTINUATION SHEET

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|---------------------------|---|--|--|
| 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 | | 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. |

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|---------------------------|--|----------------------------|---|
| <u>8000</u> | <u>REPORTS</u> | | |
| 8201 | State Audit Reports | 5 years | |
| 8202 | #59, #659 and #4502 | 5 years | |
| 8203 | #25 and #625 | 5 years | |
| 8204 | School Finance (S.F.) Reports- annual | 5 years | |
| 8205 | Special Education (S.E.) Reports-annual | 7 years | |
| 8206 | Vocation Education (V.E.) Reports-annual | 5 years | |
| 8207 | Ohio Common Core Data (OCCD) Reports | 5 years | |
| 8208 | Drivers Education Reports | 5 years | |
| 8209 | Ohio Department of Education (ODE) Reports | 5 years | |
| 8211 | Civil Rights Reports | Permanent*** | RC-3 Required |
| 8212 | Title IX Reports | 10 years | |
| 8213 | SM-1 & SM-2 (Annual and Quarterly) | 10 years | |
| 8214 | State Minimum Standards | 10 years | |
| | ***Hard Copy Maintained for 5 years, then microfilmed | | |

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|---------------------------|---|----------------------------|--|
| 8301 | Personnel State Reports (Currently SF-1, CS-1) | 4 years** | 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. |
| 8302 | Worker's Comp Wage Reports (Co. Auditor) | 5 years | |
| 8303 | Bank Balance Certification (Co. Auditor) | 5 years | |
| 8304 | Transportation Reports | 4 years** | |
| <u>9000</u> | <u>Other</u> | | |
| 9101 | Personnel Directory | 10 years | |
| 9102 | Enrollment Record (By grade and building) | Permanent*** | RC-3 Required |
| 9202 | School Calendars | 5 years | |
| 9203 | Building, Boiler, Maintenance Reports | 2 years* | |
| 9402 | Employee Handbooks | Until Superceded | |
| 9403 | Directives, Standards, Laws for Local, State and Federal Governmental Agencies | Until Superceded | |
| 9404 | Attendance Records | Until Superceded | |
| | *After end of fiscal year **Provided Audited ***Hard Copy maintained for 5 years, then microfilmed | | |