Ohio History Connection
State Archives of Ohio
OHIO
OCAL Government Records Program
800 E. 17th Avenue
Connection
Connection

#### RECORDS RETENTION SCHEDULE (RC-2) - Part 1

		be submitted					
Section A: Local Government Unit							
Galion City School District	470 Portland Way N Galion Ohio 44833						
(Local Government Entity)	(Unit)						
	Charlene Parkinson		er - 02/20/2024				
(Signature of Responsible Official)	(Name)	(Title)	(Date)				
Section B: Records Commission			<u> </u>				
Galion City Schools Records Commissiom	Records Commi	.ssion	419.468.3432				
(Local Government Entity)			(Telephone Number)				
470 Portland Way N	Galion	44833	Crawford				
(Address)	(City)	(Zip Code)	(County)				
parkinson.charlene@galionschools.org  I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, or otherwise disposed of in violation of these schedules and that no record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. This action is reflected in the minutes kept by this commission.							
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Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form.

State Archvies/LGRP- RC-2 (Part 1 & 2), Revised February 2020

#### School District Suggested Records Retention Schedule

This schedule lists records commonly created by school districts, educational service centers, and career technical schools. The retention periods specified herein are either required by statute or have been determined by best practice. Local Records Commissions may edit retention periods based on the administrative, fiscal, legal, and historical value of the records.

The local school district, education service center, or career technical school should also notate the media type of the records on the schedule in column 4. The records can be maintained on separate formats (i.e. paper and electronic) for different amounts of time. Permanent records existing solely in electronic format may become inaccessible through media decay and/or hardware/software obsolescence. The Ohio History Connection recommends that digital records with greater than a 10 year retention period also be maintained in either paper or microfilm formats.

Records may not be disposed of until all audits are released and audit discrepancies have been settled. Where a lawsuit or agency proceeding is pending, a legal hold on relevant records is required. Records shall be retained until the legal hold has been removed.

ELECTRONIC MAIL (e-mail) is a format on which records are sent, received and/or drafted using electronic mailing systems. E-mail is NOT a record series. Instead, each individual e-mail should be evaluated according to its content and retained in accordance with the record series adopted within this schedule that the content most closely fits.

Before this records retention schedule is considered in effect for a particular school district it must first be signed by a local responsible official and local records commission chair, the State Archives, and the State Auditor's Office.

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
	Board and Administrative Records				
101	Minutes - Official copy of proceedings of regular and special	Permanent	Cloud Based		
102	Audio tapes/DVD's of Minutes - Recording of Board meetings	2 years			
103	Board Meeting Notes - Notes taken during Open Board Meetings used to formulate the minutes	1 year	Paper		
104	Agendas - Written outlines of material to be discussed at the Board of Education meetings	1 calendar year provided audited	Cloud Based		
105	Board Meeting Packets - Packets prepared for board members. May include agendas, copies of reports and informational handouts.	Retain until minutes transcribed and approved	Paper		
106	Administrative Council Notes: Notes from Administrative Council meetings held prior to Board Meeting to review Board agenda and current activity in the District	1 calendar year	Paper		
1	Blueprints, Plans, & Maps -Provide detailed description of school	Permanent	Paper/D igital		
108	Deeds, Easements, Leases - Real estate documents of ownership, easements and leased property by	Permanent	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	 RC-3 Require d by LGRP
	Board Policy Books and Other Adopted Policies - Governing rules adopted and maintained by Board of Education defining expectations or position on a particular matter and authorizing appropriate action to be taken to establish and maintain those expectations	1 year after superseded		
109			Digital	
110	Administrative Regulations - Adoption of the school policy manual which outlines, and describes the means by which a policy should be implemented providing for the management of planning, action, and assessment or evaluation.	1 year after superseded	Digital	
111	Court Decisions - Court proceedings involving the District excluding claims and litigations	Permanent	Paper	
112	Claims and Litigations - Court processing for which the District is being or is suing for damages	Permanent	Paper	

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
113	Categorical Grant Programs - Records relating to the administration of federal and state categorical grantfunded programs. Records may include, but are not limited to: District or school-wide notification/information distributed to parents/legal guardians/students about education opportunities and services; student information (names/eligibility lists, copies of test scores, etc.; staff information (copies of employment applications, payroll/stubs, etc.; budget, inventory of equipment, legal reports, pre-and post-test data, comparability reports, evaluations; promotion of parent/family involvement (Title 1 parent advisory councils, coordination with other school-based programs and services, etc.)	Retain until completion of State Auditor's examination report or retain for period required by grant or program, whichever is later, then destroy	Paper		
114	Boundary Records - Official legal description of school district boundaries, educational service center district boundaries, or director district boundaries	Permanent	Paper/D igital		
	Grievance Files/Settlements/Arbitration - Documentation of settlements and arbitration, grievances filed by	10 years	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
	Historical Records, Materials and Artifacts that should be retained for Commemorative Events and Displays - Records documenting events or milestones of individual schools, school districts and educational service centers, where these events are not documented in other records (such as board minutes, transcripts, etc.) Including but not limited to award lists, baccalaureate and commencement programs, cumulative class rankings, diploma order lists, final grade point summaries, honor roll lists, graduating class history	Permanent	Paper/D		
116	files, student newspapers,		igital		
	Monthly Administrative Reports & Supporting Documentation - Reports submitted monthly by administrators and supervisors on current activity in District associated with Board Agenda	1 calendar year	Paper		
	Elections - Items put on the ballot	10 years	гарсі		<del> </del>
118	(tax levy related) regarding the financial support of the District	1	Paper		
119	Records Retention and Disposition Forms - Records, also called RC-1, RC-2, and RC-3 forms, and other locally developed forms documenting the retention and disposition of the records of an	Permanent	Paper		
120	Agreements between the board and recognized local associations of certified and classified staff with regard to wages, hours and other terms of employment including notes taken during the negotiation process	8 years after superseded	Paper		
	Budget Policy Files - annual budget	5 years			
121	(tax and appropriation) preparation and documentation		Paper		
122	Workers Compensation Claims - Claims filed by employees due to on the job injury	10 years after financial	Paper		
	Bank Depository Agreements - An agreement between a bank and the district where the bank provides a guaranteed rate of return in exchange for keeping a deposit for a fixed amount of time	4 years after completion			
123			Paper		

				For use by	RC-3
Sch.	Record Series and Description	Retention Period	Media Type	Auditor of State or LGRP	Require d by LGRP
124		2 years provided audited	Paper		
125	Adopted Courses of Study - A comprehensive instructional program serving the educational needs of the students of the District	Until superseded	PaperDi gital		
	Adopted Special Education Program - A record of programs provided to children with disabilities identified in accordance with applicable State and Federal laws, rules and regulations. These programs satisfy the requirements of Ohio Educational Agencies Serving Children with Disabilities (Ohio's Operating Standards")	Until superseded			
126			PaperDi gital		
	Adopted Special Programs - Record of programs made available to the students to enhance their education through a variety of appropriate cocurricular and extra-curricular activities	Until superseded			
127			PaperDi gital		
	Photo/Media Release - External Usage - Records documenting permission for non-school entities (such as television/radio stations, newspapers, school photographers, etc.) to use student images. Student images include, but are not limited to, photos, video and audio recordings.	Retain for six years after end of school year			
128			PaperDi gital		
	Photo/Media Release - Denial of permission. Records documenting parent/legal guardian denial of permission for the school/district to use student images recorded during official school activities/events. Includes optingout.	Retain until end of school year or until superseded, whichever is later, then destroy.			
129			Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
130	Photo/Media Release - School District Usage - Records documenting permission for the school/district to use student images recorded during official school activities/events, by staff or students in an official capacity (e.g. school newspaper, annual staff, etc.) Includes annual student identification/class pictures taken by school-contracted photographer. Student images include, but are not	Retain for 6 years after image/recording no longer being used, then destroy.	Paper		
	Public Record Requests - Requests for records & documentation that requests were fulfilled	2 years	Paper		
132	Organizational Memberships	Until superseded	Paper		
133	Visitor Log	1 school year	Paper		
134	Before and After School Child Care (Latchkey) Sign In/Out Sheets	2 years	Paper		
135	Before and After School Child Care (Latchkey)Receipts & Weekly Reports Receipts & detail information to back-up Treasurer receipts	4 years provided audited	Paper		
	Before and After School Child Care (Latchkey) Registration Forms	2 years	Paper		
137	Child Care License - Copy of Child Care license issued by ODE, required for outside school hours sites. Not required for after school at risk sites.	3 years plus current year provided audited	Paper		
138	Legal Advertisements / Notices- Announcements to inform the public of meetings, hearings, bids, auctions or other events	1 year	Paper		
100	Employee Records		I aper		
201	Personnel Files (Short-Term Retention) - Documentation of the history and status of the employment relationship with an individual employee (classified, certified, active, and inactive). Includes substitute teachers, coaches, and advisors. Records may include: employment applications, performance evaluations, grievances, employment verifications, accident report(s), payroll change sheets, PERS	Purge and destroy 7 years after employment termination	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
202	Personnel Files (Long-Term Retention) - Documentation of the history and status of the status of the employment relationship with an individual employee. Includes substitute teachers, coaches, and advisors. Records include: service time, begining/ending salary, resignation/retirement letter, retirement information	75 years after employment termination.	Paper		
203	Employee Discipline Records - Records of a series of disciplinary actions leading to improvement of performance or termination from employment	7 years after termination of employment or case closed, whichever is later, or in accordance with collective	Paper		
204	Comp Time Cards - Accumulated and used comp time cards	Current fiscal year	Paper		
205	Drug Test Records - Includes random pool eligibility lists of employees eligible to have random drug screen and drug screening results	5 years	Paper		
206	Teacher Lesson Plan Books	End of current school year or until superseded	Digital		
207		4 years after termination	Paper		
208	Professional Conference Applications - Professional leave forms requesting permission to attend professional development activity	2 years provided audited	Paper		
209	Irregular Employee Contracts - Written agreement between the District and substitutes and other irregular employees benefits	4 years after contract expires	Paper		
210	Unemployment Claims - Invoice maintained by Human Resources for the payment of unemployment claims	5 years provided audited	Paper		
211	Unemployment Records - Documentation of unemployment records	5 years	Paper		
212	Applications (not hired) - Applications submitted of individuals not hired into the	2 years provided audited	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
213	Schedules of Employees	Fiscal year plus 2 years	Paper		
214	Teacher Personnel Reports (internal)	Fiscal year plus 1 year	Paper		
215	I-9 Immigration Form - Form I-9 "Employment and Eligibility Verification" for all newly hired employees to verify their identity and authorization to work in the United States. Per Department of Homeland Security regulation 8 CFR	3 years after date of hire or 1 year after termination, whichever is later	Paper		
216	Job Descriptions - Description of expectations and responsibilities of each job	Retain until superseded or obsolete	Paper		
217	Job Postings - Records documenting the posting and advertisement of employment positions, including, but not limited to, job descriptions, job requirements, application deadline, personnel requisition and compensation range.	2 years	Paper		
218	LPDC (Local Professional Development Committee) Licensure Records and Staff Summary Reports	Until superseded	Paper		
		10 years	Paper		
220	Staff Acceptable Use Policy - A Form signed by staff agreeing to use the District network responsibly for District related work	6 years	Paper/D igital		
221	Staff Profile - Listing including current position, licensure, degree, retirement credit, and contract	5 years	Paper/D		
	Annual Training Documentation - Record of trainings includes curricula, test results, materials presented, evaluations, tests administered; certification/hours/credits/ points awarded; sign-in sheets, and	3 years plus current year provided audited	Paper		
223	Teachers Certificates and Temporary Professional Education Permits	6 years after end of fiscal year, then destroy	Paper		
224	Employee Handbooks - Handbooks that each employee receives upon being	Until superseded	Paper		
	Physician's Report of Work Ability - Physicians report of ability/restrictions for injured employees	7 years	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
	Student Records				
	Student Records- (Long-Term)				
	Student Information- Record of student's name, address, telephone number, grades, attendance record,	Permanent	Paper/D		
301	classes attended, grade level		igital		
	Grades/Transcripts - Reports of subjects studied and individual student grades. Retain final grade card each year and final high school transcript. If student withdraws, retain all transcripts	75 years after graduation, withdrawal, or transfer	Paper/D		
303	Individual State Test Results - IOWA, COGAT, OAT, OAA, OGT, OTELA, PSAT, ACT, SAT, PLAN, EXPLORE, OPT, ASVAB, TERRA NOVA, LAS, DIAL, KRA-L, IQ - achievement ability tests	75 years after graduation, withdrawal, or transfer	Paper/D igital		
304	Foreign Exchange Records - Records of students from foreign countries	75 years after graduation, withdrawal, or transfer	Paper/D igital		
305	Home Schooled Records - Records of students living within the District that are being schooled from home	75 years after graduation, withdrawal, or transfer	Paper/D		
	Student Records- (Short-Term)			•	
306		6 years after graduation, withdrawal, or transfer	Paper/D igital		
307A	Activity Record - A list of activities students participated in during their high school years	6 years after graduation, withdrawal, or transfer	Paper/D igital		
	Liability Waivers - Records document the release of the school, district, or ESC from liability related to various activities that include student, volunteer, or citizen involvement. Records may include but are not limited to release forms	3 years after school year in which records were created. In the event of accident or			
307B	with terms, date, signatures, and related information. Includes athletic participation waivers and forms related to legal requirements	injury, retain until minor reaches the age 21	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
307C	Student Athlete Files- Records maintained on student athletes, including physical exams, consent forms, and eligibility evaluations.	3 years after school year in which records were	Paper/D igital		
308A	Student Worker Applications	6 years after graduation, withdrawal, or transfer	Paper/D		
	Student Work Permits- State issued permit for a student under the age of 18 to be employed	3 years	igital Paper/D igital		
309		6 years after graduation, withdrawal, or transfer	Paper/D igital		
	Intervention Records - Intervention Assistance Team notes listing all of the interventions that were tried with a student to help improve academic achievement which may or may not lead to a referral for special education testing. Includes functional behavioral assessments	6 years after graduation, withdrawal, or transfer	Paper/D		
310	and behavior intervention plans  Bullying/Harassment Forms -  Documentation of bullying/harassment incidents within the District, along with action taken	6 years after graduation, withdrawal, or transfer	igital Paper/D igital		
	Gifted and Talented Student Records - Student folders including but not limited to application or offer for participation, testing or eligibility determination records, progress reports, product assessment, samples of student's works, notes, and correspondence.	6 years after graduation, withdrawal, or transfer	Paper/D igital		
313	Attendance/Absence Records - Record of student attendance/absence including daily office call sheets, sign-in sheets, and doctor and parent's notes	1 year	Paper/D igital		
314	Cumulative Photo Records	1 year after graduation	Paper/D igital		
315	Curriculum Requests/Waivers/Substitutions - Records relating to student requests for classes or waivers/substitutions, where authorizing signature/initials from school district staff is required	1 year after graduation	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
316		Retain until end of school year, then destroy	Paper/D igital		
	Student Acceptable Use Policy - A form signed by parents permitting student online access, student information to be used in the media as well as parent/teacher email	6 years	Paper/D		
317	communication Statement of Requirements and Expectations Signed and Returned by Parent/Legal Guardian	Retain until end of school year, then	igital Paper/D igital		
	Student Schedules/Contact Information	destrov. Until superseded	Paper/D igital		
320	Interim Grade Reports - Mid-term status report of student performance with teacher comments not part of permanent record.	End of current school year	Paper/D igital		
321	Records - Purpose clauses/budgets of student clubs engaging in financial activities	2 years after end of fiscal year	Paper		
322	Adult Basic Literacy Education/General Education Development. (ABLE/GED) Records - Includes student registration forms, release of information form, student progress forms, and standardized assessment answer sheets.	1 year	Paper		
323	Custody Court Documents - Verification of court established guardianship/custody	Until superseded or student reaches 18 years of age	Paper		
	Notice of Placement Termination - A notice of termination of placement relinquishing care and control, noticed received from the County Juvenile Court	5 years	Paper		
	Child Abuse/Neglect Referral Letters - Records related to suspected child abuse as reported to Child Protective Services or to the proper law enforcement agency - includes reports, confirmation of submission, correspondence, inquiries, records documenting revisions/corrections, etc.	Through graduation	Paper		
326	Teacher Grade Books/Records	3 years provided audited	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP			
200	Pre-School Screening Profile - ASQ/SE, GGG assessment record. A screening profile used for pre-	3 years	Danas					
327	school students	E	Paper					
220	Open Enrollment Forms - Registration of student living outside the District enrolling into	5 years	Papar					
328	Transfer Records - Records of	5 years	Paper					
	students transferring from one school to another (granted/not	3 years						
329	aranted)	TT:: 4 4 7	Paper					
	<pre>Emergency Information - A form containing student emergency contact information</pre>	Until superseded						
330			Paper					
	Health/Medical Records - Student visual and hearing screening and immunization records. Also includes	10 years after last contact						
	record of health screenings such as audio/visual, physical therapy, speech-language pathology, and							
	physician instructions		Paper					
	Health Logs - Record of health care services provided to students such as medication and first aid.	2 years						
332	as medication and first aid.		Paper					
333	Free/Reduced Price Lunch Application - Confidential applications for free and reduced lunch benefits	4 years	Paper/D					
Spec	ial Needs Records							
when 3301-infor of in These	In accordance with OAC 3301-51-04 and 34 CFR 300.624, parents should be informed when personally identifiable information collected, maintained or used under OAC 3301-51-04 is no longer needed to provide educational services to the child. This information must also be destroyed at the request of the parent with the exception of information described in item 301.  These records may be needed beyond the retention period in connection with applications for social security or other benefits. However, unnecessarily long							
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334	Special Education Tutoring Reports - These files document tutoring provided to students through special programs. They include authorization forms signed by parents allowing their child to participate in the program.	Retain 6 years after student graduates or would have normally graduated.	Paper					

				For use by	RC-3
Sch.	Record Series and Description	Retention Period	Media Type	Auditor of State or LGRP	Require d by LGRP
	Psychological Records (Restricted) -	Retain 10			
	Records that document all students	years after			
	who are provided counseling,	last contact.			
	pyschological services by the	Inform parent or adult			
	school's counseling center. Clinicians provide treatment	student			
	concerning personal problems,	before			
	academic concerns, and career	destruction			
	concerns. Records may include	pursuant to			
	extensive notes made by providers	OAC-3301-51-			
	concerning the assessment,	04 (0) (1)			l —
	diagnosis, treatment and contacts				
	(written, telephone, or in person)				
	with each student; referral letters;				
335	release of medical records; letters		Paper		
333	to agencies or others concerning the Evaluation Team Report (ETR) - A	Retain 6	raper		
	report that is developed after a	years after			
	series of assessments given by the	student			
	school psychologist and others to	graduates or			
	determine whether or not the student	would have			
	has a disability	normally			
		graduated.			
		Inform parent			
		or adult			
		student before			
		destruction			
		pursuant to			
		OAC-3301-51-			
336		04 (0) (1)	Paper		
	Individual Education Plan (IEP) - A	Retain 6			
	legal binding document that lists	years after			
	goals/objectives and related	student			
	services that the student will receive throughout the calendar year	graduates or would have			
	based on the assessment results of	normally			
	the ETR (Evaluation Team Report)	graduated.			
	100000000000000000000000000000000000000	Inform parent			
		or adult			
		student			
		before			
		destruction			
		pursuant to			
		OAC-3301-51-			
337		04 (0) (1)	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or	RC-3 Require d by
				LGRP	LGRP
	504/ADA Plan - Plan that allows	Retain 6			
	various accommodations for a student	years after			
	with a general disability	student			
		graduates or			
		would have			
		normally			
		graduated.			
		Inform parent			
		or adult			
		student			
		before			
		destruction			
		pursuant to			
		OAC-3301-51-	_		
338		04 (0) (1)	Paper		
	Home Instruction (HI) - Records	Retain for 6			
	that identify students that are on	years after			
	home instruction due to medical or	student			
	severe behavioral needs. These	graduates or			
	records include lesson plans,	withdraws			
	progress reports, grades and time	from			
	sheets of the tutor that worked with	district,			
339	the student	then destroy.	Paper		
	Transfer of Home-Based Student to	Retain for 3			
	School/District - Records relating	years after			
	to the transfer of home-based	student			
	student to school/district,	graduates or			
	including placement/ evaluation test	withdraws			
	results, notice of transfer, etc.	from			
240		district,	Dana		
340	Special Needs Records (Student not	then destroy. Retain for 5	Paper		<u> </u>
	Eligible) - Referrals, evaluations,	years after			
	evaluation reports, and notices for	student			
	students determined not to be				
		determined to			
	eligible for the special education	be ineligible			
341	program	then destroy.	Paper		
	Student Psychological or Social	Retain 1 year	- 4501		<del>                                     </del>
	Assessment (Non-Special Education) -	after report			
	Source materials used in preparing	is written			
	reports, including protocols, tests,				
342	and notes		Paper		
<u> </u>	Student Psychological or Social	Retain 6	- <u>-</u> -		
	Assessment (Special Education) -	years			l _
	Source materials used in preparing	<u> </u>			
	reports, including protocols, tests,				
343	and notes		Paper		
	BUILDING RECORDS				
	Building Account Reports - Report of	Until			
	maintenance and custodial services	superseded			
	accounts				
401			Paper		
	E-Rate Funding Application - Federal	6 years			
402	Telecommunications funding		Paper		
102	annlications	I .	1-0501		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
403	Multi-Site Monitor Review Forms - A checklist to ensure that the site is properly following the CACFP guidelines.	3 years plus current year provided audited	Paper		
404	School Safety Plans - Records related to ensuring student and staff safety at school, including harassment and bullying prevention plans	Retain 6 years after obsolete or superseded, then destroy	Paper/D igital		
	Records of Drills or Rapid Dismissals and School Safety Drills - Records of all tornado, fire, rapid dismissal, and school safety drills performed within a building. Records should include the identity of the person conducting the drill, date and time, notification method, staff members on duty and participating, number of occupants evacuated, special conditions simulated, problems encountered, heath conditions, and time required to accomplish complete evacuation. Records for school safety drills must contain the date and time of each drill conducted the prior school year and when they will be	1 year after end of fiscal year	Paper		
406	Fire Inspection - Reports of building inspection performed by the city Fire Division	4 years provided audited	Paper		
407	Building Inspection Reports - Elevator, sprinkler, and alarm system reports	2 years	Paper		
408	Building Health Inspections - A record of all health inspections performed within a building	2 years after end of fiscal year	Paper		
409	ISATES TEDOTIS	2 years	Paper		
410	Receipt and Deposit Slips - copies of receipts for monies turned into the office	4 years provided audited	Paper		
411	Budget and Appropriation Records - Record of building budget	4 years provided audited	Paper		
	Requisitions and Purchase Orders - Record of money being requested and a record of items purchased form the building budget	2 years	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
413	Inventories - Inventory of supplies, textbooks, and other materials purchased and used with the building	Until superseded	Paper/D igital		
414	Student Handbook - Handbook containing student policies, regulations and codes	Until superseded	Paper/D igital		
415	Building Security/Surveillance videos	cycle then reuse provided no action pending	Digital		
	Administrative Offices				
501	reachers	5 years	Paper/D igital		
502	Personnel Directory - Names, phone numbers and addresses of all employees	10 years	Paper/D igital		
503	Enrollment Record (by	Permanent	igital		
504	Repair, Installation and Maintenance Records - A record of maintenance, installation and repairs performed on buildings within the District	4 years provided audited	Paper/D		
505	Building/Facilities and Equipment Inventory - Inventory of equipment owned by District	Until superseded provided	Paper/D igital		
506	Building, Boiler & Maintenance Reports - Inspection/ maintenance reports for each building including boiler inspection/ maintenance	Until superseded provided audited	Paper		
507	Prevailing Wage Records - Report of hourly wages, benefits and overtime, established by regulatory agencies for each trade and occupation employed in the performance of public work	4 years provided audited	Paper		
	regarding facilities usage: building permits submitted to use facilities by school or community individuals, athletic teams or groups	2 years provided audited	Paper		
509	requested maintenance/custodial work	4 years provided audited	Digital		
510	Environmental Reports and Data - Reports on asbestos and other environmental issues	4 years provided audited	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
511	Vandalism Reports - Reports of vandalism throughout the District	4 years provided audited	Paper		
512		Until superseded	Paper		
513	Sales Potential Form (Student Activities)	4 years provided audited	Paper		
514	Sales Potential Forms - Fundraising permission form including the financial summary of the fundraiser upon completion of the event	4 years provided audited	Paper		
515	Bids and Specifications (Unsuccessful) - Documentation of bids supplied by vendors for any project requesting bids in compliance with ORC	1 year provided audited	Paper		
	Bids and Specifications (Successful) - Documentation of bids supplied by vendors awarded any project requesting bids in compliance with ORC	4 years after completion of project	I .		
517	Contractor Files - Contractor resolutions, additions drawings, etc.	5 years after completion of project provided audited and no action pending	Paper/D		
	Transportation Department	•		•	,
518	Driver Physical - A report of the annual physical performed on drivers	6 years (See OAC 3301-83- 07-E-7)	Paper		
519		Retain for 6 years after end of school year, then destroy	Paper/D igital		
520	Fuel Consumption Data - Fuel records for the buses	4 years provided audited	Paper/D igital		
521	Transportation Records - Transportation requests received from schools that include student	4 years provided audited	Paper/D igital		
522	Field Trip Forms/Volunteer Driver Forms - Forms from building requesting busing for field trips	Fiscal year plus 2 years	Paper/D igital		
523	Preventive Maintenance Reports - A report of work performed to maintain equipment	Fiscal years plus 2 years	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
524	Warranty/Guarantee - Warranty of equipment	Life of equipment	Paper		
525	Plant and Equipment Inventory	Until superseded provided audited	Paper/D igital		
526	Vendor Data: W-9 and 1099 documents maintained as long as active vendor then retention period is applied.	6 years and current provided audited	Paper		
527		3 years provided no action pending	Paper/D igital		
528	Idiia Duses.	Life of vehicle	Paper		
529	Vehicle License - BMV licensing documentation of motor vehicles	1 year after termination	Paper		
530	Vehicle Records - Vehicle insurance, finance paperwork	As long as vehicle is owned by District	Paper		
531	Driver Certification - Bus driver certification form	1 year after termination	Paper		
532	Supplies Inventory - Shop/mechanic inventory	Until superseded	Paper		
533		Life of vehicle	Paper		
534	Bus on Board Security & Surveillance videos	Use for one recording cycle then reuse provided no action	Digital		
	Improper Student Conduct on School Buses - Records documenting instances of improper student conduct on school buses including bus route, time of incident, nature of incident, and students name	Retain for 1 year after incident, then destroy	Paper/D		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
	Application for Special Transportation - Application for students with physical disabilities/medical problems	4 years after end of fiscal year or until completion of State Auditor's			
536		examination report, whichever is sooner	Paper/D		
537		Retain for 1 year after end of school year	Paper		
	Food Services Department				
538	Food Service Records - Financial information, breakfast cost sheets, milk sold, menus, students served	4 years provided audited	Paper		
539	Lunchroom Records - Cashier's daily production sheets from each building, cash register tapes	4 years provided audited	Paper		
540	Lunchroom Reports - Confidential applications for free and reduced lunch benefits	4 years provided audited	Paper/D igital		
541	Inventories - Inventory of food supplies	4 years provided audited	Paper/D igital		
542	Lunchroom/ Food Service License - Current food service license, issued annually by the board of health of the health district in which the food service operation is located.	1 year after expiration	Paper		
543	Vendor Food Service Contract - Contract between the District and an outside vendor providing meals and	3 years plus current year provided audited	Paper		
544		Retain for 6 years after plan obsolete or superseded, then destroy	Paper		
	Financial Records				
601	Audit ReportsPast management evaluation reports, monthly claim documentation, master lists, and income eligibility applications	3 years plus current year provided audited	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
	Annual Financial Reports - Financial reports prepared from the accounting system that can be reproduced from the computer records. This includes: Annual Ledgers, Budget	5 years provided audited			
602	Ledgers, Vendor Listing, Check Register, Invoice List, Purchase Order Listing, Accounts Reports, Financial Summary and Detail Reports		Paper/D igital		
603	Activity Fund Cash Journal & Ledger	5 years provided audited	Paper/D igital		
604		20 years after issue expires	Paper		
605	Securities	Permanent	Paper		
606		5 years provided audited	Paper		
607	Foundation Distribution - Report from the Ohio Dept. of Education for bi-monthly foundation (state basic aid) receipts	5 years provided audited	Paper/D igital		
	Tax Settlements (Semi-Annual) and Advances - Property tax settlement sheet including advances from the County Auditor included in the receipts	5 years provided audited	Paper/D		
	Budgets (Annual) - Tax budget that is submitted annually to the County Auditor	5 years provided audited	Paper/D igital		
610	Budget Working Papers	5 years provided audited	Paper/D igital		
611	Insurance Policies - Contracts between insurer and the School district where the insurer, in exchange for premium payment, pays for damages to the School District which are caused by covered perils under the policy language.	15 years after expiration provided all claims settled	Paper/D		
612	Contracts - An agreement with specific terms between an entity with the School District	15 years after expiration	Paper		
613	Bonds and Coupons	Until redeemed provided	Paper/D igital		
614	Accounts Payable Ledger - Outstanding payables	5 years provided audited	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
615	Accounts Receivable Ledgers - Outstanding revenue due to the school District	5 years provided audited	Paper/D igital		
616	Vouchers, Invoices and purchase orders - A voucher is a documentary record of a business transaction (i.e. check or invoice). A purchase order is a document itemizing products/services to be purchased from a vendor. Serves as a	10 years provided audited. ORC 3313.29.	Paper/D igital		
617	State Program Files - Auxiliary services, records of non-public school funding provided by the Ohio Department of Education and through public and private grants	10 years provided audited	Paper/D igital		
618	Federal Programs - Title I (Student Progress Reports), II, III, IV-B, IDEA, IV-C, VI-B, Chapter 1, 2; Drug	10 years provided audited	Paper/D igital		
	of expenditures for travel of district employees	10 years provided audited	Paper		
620	Tax Anticipation Notes - Documents related to the preparation, sale and history related to issuance of notes borrowed against future tax dollars	10 years provided audited	Paper		
621	State Reimbursement Settlement Sheets	5 years provided audited	Paper		
622	Unemployment Claims - Documentation of unemployment for application of unemployment benefits	5 years	Paper/D igital		
623		5 years	Paper/D igital		
624		15 years after expiration	Paper		
625	Appropriation Resolutions - Resolution approved by the Board of Education establishing and amending the appropriation for the District	5 years	Paper		
626	Tax Apportionments (Semi-Annual) - Documentation prepared by the County Auditor and report to the District to record receipt of property tax settlement	5 years	Paper		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
627	Canceled Checks and Bank Settlements - All checking accounts reconciliation and statements	4 years provided audited	Digital		
628	Publication Notice - Legal notice of publication in the newspaper	4 years	Paper/D igital		
629	Tuition Fees and Payments - Receipt records at the Treasurer's Office	4 years provided audited	Paper/D igital		
630	Unpaid Student Fees	Through graduation	Paper/D igital		
631		4 years provided audited	Paper/D igital		
632	Investment Records - Individual record of investments bank confirmations, wire transfers,	4 years provided audited	Paper/D igital		
633	Travel Expense Reports	10 years provided audited	Paper/D igital		
634	State Sales Tax Reports - State of Ohio semi-annual sales tax filings, reporting any taxable sales.	4 years provided audited	Paper		
635	Student Activity Funds - Student activity funds, pay in forms, bank deposit forms and receipts confirming deposits made into student activity accounts	4 years provided audited	Paper		
636	Check Registers - Lists of checks issued by the District	4 years provided audited	Paper/D igital		
637	Deposit Slips/Cash Proofs - Receipts for deposit slips	4 years provided audited	Paper		
638	Receipt Books - Receipts issued for money received.	4 years provided audited	Paper		
639	Extra Trip Records	4 years provided audited	Paper		
640	Monthly Financial Reports - Report generated from the system to report the financial status the District prepared on a monthly basis	4 years provided audited	Digital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
641	COMBITAINCE WILL OKC	4 years provided audited	Paper		
	Service Contracts - Contracts for services provided from an outside education	4 years provided audited			
642			Paper		
643	State Subsidy Reports - Applications for driver education, pupil transportation and special education	3 years provided audited	Paper/D		
644	Delivery/Packing Slips	1 year provided	Paper		
645	Requisitions - Documents used to request the purchase of something that is submitted for approval and then can be converted to a purchase order	1 year after end of fiscal year	Paper/D		
646	Non-Sufficient Fund Checks Documentation & Notifications	4 years provided audited	Paper/D igital		
	Payroll Related Records				
	Salary Continuation Agreement -	7 years	I		
701	Agreement stating full or partial compensation during period of disability		Paper/D igital		
702	Payroll Ledgers - Record of gross to net calculations by employee	6 years and current	Paper/D igital		
703	Earning Registers - Record of gross to net calculations by employee and by calendar year	6 years and current provided	Paper/D igital		
704		6 years and current provided audited	Paper/D igital		
705	Bureau of Employment Service Quarterly Reports - OBES reports (quarterly earnings and record of weeks worked by employee)	7 years	Paper/D igital		
706	W-2's and W-4's - Employer's copy of calendar year record of taxable earnings, a record of employee federal exemptions	6 years and current provided audited	Paper/D		
707	Federal Income Tax - Quarterly and annual record of federal income tax withheld and remitted IRS form 941	6 years and current provided audited	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
708		6 years and current provided audited	Paper/D igital		
709	City Income Tax - Monthly and annual record of municipality income tax withheld and remitted	6 years and current provided audited	Paper/D igital		
710	School Income Tax - Monthly and annual record of School District income tax withheld and remitted SDIT-1	6 years and current provided audited	Paper/D igital		
711	Payroll Reports - Payroll deduction and distribution reports	4 years provided audited	Paper/D igital		
712	Payroll Update Listing	4 years provided audited	Paper/D igital		
713	Payroll Calculations - Paper and electronic reports used to balance gross net calculations	4 years provided audited	Paper/D igital		
714	State Teachers System and School Employees Retirement System Waivers - Waiver forms for students an/or jobs not eligible for retirement withholding	Permanent	Paper/D		
	State Employees Retirement System (SERS) - Record of SERS withholdings	4 years provided	Paper/D igital		
	State Teachers Retirement System (STRS) Record of STRS withholdings per pay and annual	4 years provided audited	Paper/D igital		
717	Annuity Reports	4 years provided audited	Paper/D igital		
718		4 years provided audited	Paper/D igital		
719	Employee Requests and/or Authorization for Leave Forms - Request for sick, vacation, personal, or other leave	4 years provided audited	Paper/D igital		
	Deduction Reports - Voluntary payroll deductions per pay that include all deduction withholdings for each employee	4 years provided audited	Paper/D		
721	Employee Vacation/Sick Leave Records - Records of each employee's sick and vacation leave	4 years provided audited	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
722	Time Sheets - Record of hours worked	6 years provided audited	Paper/D igital		
723	Overtime Authorization	6 years	Paper/D igital		
724	Employee Insurance Bills - Monthly reconciliation of employee medical, dental and life insurance bills	4 years provided audited	Paper/D igital		
725		4 years provided audited	Paper/D igital		
726	Payroll Bank Statement - Includes bank statements and reconciliation	4 years provided audited	Paper/D igital		
727	Deduction Authorization - Forms to withhold deductions from an employee's pay	Until superseded or employee terminates	Paper/D igital		
728	Court Ordered Garnishments	4 years after cause fully paid	Paper/D igital		
	Reports				
801	State Audit s /GAAP (Generally Accepted Accounting Principles) Reports- Annual financial audit	5 years	Paper/D igital		
802	Special Education (S.E.) Reports -	7 years	igital		
803	Vocation Education (V.E.) Reports - Annual	5 years	Paper/D igital		
804		5 years	Paper/D igital		
805	Drivers Education Report	5 years	igital		
806	Ohio Department of Education (ODE) Reports - Academic reports from the Ohio Department of Education	5 years	Paper/D igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
	Alternative Learning Experience - Records documenting student participation in an alternative learning experience program. Includes but is not limited to: Letter of attestation/statement of understanding; district release form and/or shared agreement (if sharing student); written student learning plan (start/stop dates), approval date when district/teacher approves plan; estimated hours per week of student participation; instructional materials needed; timelines and methods for evaluating student progress; specific learning goals/objectives/requirements; student/teacher instructional two- way interactions/contacts/ monthly progress evaluations and weekly communications with student (and	Retain for 5 years after end of school year then destroy.	Paper/D		
807	parent/legal guardian for student		igital		
808		Permanent	Paper/D igital		
809	Title IX Reports - Includes any required reporting as requested by state or federal agencies	10 years	Paper/D igital		
810	State Minimum Standards - A record of minimum standards given to the District by the State Department	10 years	Paper/D igital		
811	Personnel State Reports (SF-1, CS-1)	4 years provided audited	Paper/D igital		
812		5 years	Paper/D igital		
813		5 years	Paper/D igital		
814	Bank Balance Certification (Co. Auditor)	5 years	Paper/D igital		
815	Transportation Reports - State transportation reports, T-1 and T-2	4 years provided audited	Paper/D igital		
816	EMIS Reports	7 years	igital		

Sch.	Record Series and Description	Retention Period	Media Type	For use by Auditor of State or LGRP	RC-3 Require d by LGRP
	General Records				
	Directives, Standards, Laws for	Until	Paper/D		
901	Local, State, and Federal	Superseded	igital		
- 501	Covernmental Agencies Executive Correspondence -	5 years; file	Igicai		
	Correspondence of the District	with related			
	Superintendent and Administrative	records if			
	staff dealing with significant	content			
	aspects of the administration of the	requires			
	District. Includes information	longer			<u> </u>
	concerning agency policies,	retention;	,		
	procedures, program, fiscal and	appraise for	Paper/D		
902	personnel matters.	historical	igital		
	General Correspondence - Requests	2 years			
	for information pertaining to				
	interpretations and other misc.				l
	inquiries; informative - does not				
	attempt to influence policy.		Paper/D		
002	Including copies of outgoing correspondence maintained for		igital		
903	Transient Correspondence/Material-	Retain until	Igitai		
	All informal and/or temporary	no longer of			
	messages and notes, including email	administrativ			
	and voice mail messages, and all	e value, then			
	drafts used in the production of	destroy			
	public records that do not set				
	policy, establish guidelines or				
	procedures, certify a transaction or				
	become a receipt. Includes				
	communications which convey				
	information of temporary importance,				
	referral letters, and requests for				
	routine information or publications		Paper/D		
904	provided to the public by the		igital		
704	provided to the public by the District which are answered by Copies, Duplicates, Non-Records -	Until no	Igicai		
	Items not included in the scope of	longer of			
	official records as defined by ORC	administrativ			
	149.011 (G) which may include	e value			
	convenience copies, described as non-				
	official copies of records, used for				
	convenient reference, that duplicate		Paper/D		
905	official records kept by the office		igital		
	Exposure Reports - Report of contact	7 years	-		
	with blood or other potentially		Paper/D		
906	infectious materials		igital		_
900	Incident/Accident Reports - A report	7 years			
	of student/employee injuries or	provided no			
	accidents including place time and	action	Paper/D		
907	witnesses	nending	igital		