NONINSTRUCTIONAL OPERATIONS

8605

Retention of District Records

In compliance with Idaho Code, the Board of Trustees establishes the following guidelines to provide administrative direction pertaining to the retention and/or disposal of District records. This schedule likewise identifies the anticipated physical location where such records may be kept or maintained by the District, in addition to the possible document retention of all categories of records on the school's servers and computer systems.

The District's Public Records Custodian(s), in conjunction with the Superintendent, or designee, is responsible for the maintenance, safeguarding, and destruction of the District's records. Performance of such duties shall be in cooperation with the District's Business Office, Directors of Maintenance and Transportation, Technology Coordinator, the Principals at the school's buildings, and other administrative personnel employed by the District. However, each school employee is likewise responsible for having knowledge of this policy and the requirement to safeguard the District's records, electronic or otherwise, consistent with the chart below.

The District's Public Records Custodian(s) shall work in conjunction with the District's Technology department to assure that the school's staff is aware of the routine destruction of electronic District records, including emails, such that they are able to assure that the District's public records are retained consistent with this schedule, regardless of whether they are maintained in a hard copy or an electronic copy. In such a process, the District's employees need to retain District records included on the schedule below, particularly student educational records, personnel records, and investigative records, in a format that is not part of the District's routine electronic records destruction and/or notify the technology personnel of the District that a particular document is not to be destroyed as part of the routine destruction of electronic records.

Unless otherwise prohibited by applicable law, all District records may be maintained electronically and/or in hard physical copy.

Method of Destroying Official Records

The District's official records, and any copy thereof that may be deemed to be confidential and/or not intended to be disseminated to the public, will be shredded before disposal.

Destruction of Email and Other Electronic Communications

The District will store emails for a maximum period of _____10 Years____. All email will be automatically deleted from the District's system at the end of this retention period. It is the responsibility of every district employee to ensure that District documents that need to be retained for a longer period of time due to federal law, State law, or the provisions of this policy are retained accordingly and in a different format than email.

An employee's failure to retain District documents accordingly could serve as a basis for discipline, up to and including possible termination.

Suspending Destruction of Official Records

The District will immediately cease the destruction of all relevant records, including electronic records, even if destruction is authorized by an approved Retention Schedule, for the following reasons:

- 1. If the District receives a public records request;
- 2. If the District believes that an investigation or litigation is imminent; or
- 3. If the District is notified that an investigation or litigation has commenced.

The Public Records Custodian(s) and Superintendent are responsible for carrying out this policy.

If relevant records exist in electronic formats (such as email, digital images, word processed documents, databases, backup tapes, etc.) the District's Administrative personnel shall notify its information technology staff to cease the destruction of records relating to the subject matter of the suit/potential suit or investigation. Failure to cease the destruction of relevant records could result in penalties against the District.

District records shall be retained and/or disposed of as follows:

| Retention Codes | | |
|--|----------------------------------|----------------------|
| AC—After closed, terminated, completed, expired, | LA—Life of Asset | DO – District |
| settled, or last date of contact | PM—Permanent | Office |
| FE—Fiscal Year End (June 30 th) | US—Until Superseded | SB – School |
| | _ | Buildings |
| | | DM – District |
| | | Maintenance |
| | | DT – District |
| | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | |
| ADMINISTRATION—ATTENDANCEANNUAL | PM | DO, SB |
| ATTENDANCE SUMMARIES BY BUILDING | | |
| ADMINISTRATION—ATTENDANCE—Enrollment | 3 yr | DO, SB |
| attendance data | | |
| ADMINISTRATION—OATHS OF ELECTION— | Not less than 8 months following | DO |
| until canvassed and recorded in the minutes | election | |
| ADMINISTRATION—CONTRACTS FOR THE | PM | DO, SB, DM, DT |
| SALE AND PURCHASE OF REAL PROPERTY | | |
| ADMINISTRATION—CONTRACTS AND LEASES | AC +6 yr | DO |
| | - | |
| ADMINISTRATION—GENERAL | 3 yr | DO, SB |
| CORRESPONDENCE | | |
| ADMINISTRATION—DONATION/GIFT RECORDS | PM | DO, SB |
| ADMINISTRATION—BOARD MEETINGS— | PM | DO |
| AGENDA AND MINUTES: Official minutes and | | |
| agenda of open meetings | | |

| DISTRICT RECORDS RETENTION SCHEDULE | | |
|---|----------------------------------|-------------------------|
| Retention Codes | I A Life of Agest | DO District |
| AC—After closed, terminated, completed, expired, settled, or last date of contact | LA—Life of Asset PM—Permanent | DO – District Office |
| FE—Fiscal Year End (June 30 th) | US—Until Superseded | SB – School |
| FE—Fiscal Year End (June 30) | US—Until Superseded | Buildings |
| | | DM – District |
| | | Maintenance |
| | | DT – District |
| | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | Transportation |
| ADMINISTRATION—BOARD MEETINGS— | PM—Restricted Access | DO |
| CLOSED: Certified agendas or tape recordings of closed | I WI—Restricted Access | DO |
| meetings | | |
| ADMINISTRATION—ORGANIZATION CHARTS: | PM | DO, SB, DM, DT |
| Any documentation that shows program accountability | 1 141 | DO, SD, DNI, D1 |
| ADMINISTRATION—EDUCATION PROGRAM | AC+3 yr | DO, SB |
| REVIEW RECORDS | AC+3 yi | DO, SB |
| ADMINISTRATION—OFFICIAL STATE | PM | DO |
| DEPARTMENT REPORTS | 1 171 | 100 |
| ADMINISTRATION—SCHOOL CERTIFICATION | PM | DO |
| REPORTS | 1111 | DO |
| ANNUAL REPORTS | PM | DO |
| APPEAL AND REVIEW RECORDS—Records may | PM | DO |
| include but are not limited to narrative history or | 1 171 | DO |
| description of appeal; minutes and testimony; exhibits; | | |
| reports and findings of fact; final orders, opinions, | | |
| conclusions, or decisions; audio recordings; hearing | | |
| schedules and lists of participants; and related | | |
| correspondence and documentation. | | |
| BOARD MEMBER RECORDS—Series documents | AC+3 yr | DO |
| board activities and serves as a reference source for | NOTE: Some materials may | |
| board members. Records may include but are not limited | warrant long-term retention. | |
| to correspondence, plans, statements of goals and | These materials should be | |
| objectives, budgets, financial statements, reports, other | reviewed for archival materials. | |
| reference material. Records are often compiled in a | | |
| notebook or electronically for each member. | | |
| BOARD RECORDS—Series documents the official | PM | DO |
| proceedings of the board meetings. Records may include | | |
| meeting notices; items for Board action; contested case | | |
| hearings schedules; committee reports; exhibits; and | | |
| related correspondence and documentation. Records | | |
| may also include audio recordings of meetings used to | | |
| prepare summaries. | | |
| COMPUTER SYSTEMS-BACKUPS—Backups on | US or 1 year | DO |
| tape, disk, CD, DVD, etc. | _ | |
| CAUTION: Records stored in this format can be | | |
| subpoenaed during litigation. | | |
| - | | |
| EQUIPMENT-HISTORY FILE—Equipment service | LA+3 yr | DO, DM, DT |
| agreements, includes maintenance agreements, | in i o y i | DO, DM, D1 |
| installation, and repair logs, etc. | | |
| | 1 | |

| DISTRICT RECORDS RETENTION SCHEDULE | | |
|---|-------------------------------------|----------------------------|
| Retention Codes | LA—Life of Asset | DO – District |
| AC—After closed, terminated, completed, expired, | | |
| settled, or last date of contact | PM—Permanent | Office SB – School |
| FE—Fiscal Year End (June 30 th) | US—Until Superseded | |
| | | Buildings DM – District |
| | | Maintenance |
| | | DT – District |
| | | |
| DECORDO DECORIDADA | DETENTION DEDICE | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | DO CD DM DT |
| EQUIPMENT MANUALS—Instruction and operating | LA | DO, SB, DM, DT |
| manuals EQUIDMENT WARD ANTIES | ACI1 | DO CD DM DT |
| EQUIPMENT WARRANTIES FACILITIES OPERATIONS-APPRAISALS— | AC+1 yr | DO, SB, DM, DT |
| | 3 yr | שט |
| Building or property FACILITIES OPERATIONS-BUILDINGS PLANS | PM | DO DM |
| | | DO, DM |
| AND SPECIFICATIONS—Includes architectural and | For leased structures retain AC+2 | |
| engineering drawings, etc. FACILITIES OPERATIONS-BUILDINGS, | LA | DO, SB, DM |
| CONSTRUCTION CONTRACT, INSPECTION | LA | DO, SB, DM |
| | | |
| RECORDS AND PROJECT FILES—Building | | |
| construction contracts, surety bonds and inspection | | |
| records, Planning, design, construction records, and all | | |
| bids, etc. | EE 2 | DO CD DM DT |
| FACILITY OPERATIONS—DAMAGE REPORTS; LOST AND STOLEN PROPERTY REPORTS | FE+3 yr | DO, SB, DM, DT |
| FACILITY OPERATIONS-PROPERTY DISPOSAL | PM | DO |
| RECORDS—Documenting disposal of inventoried | | |
| property | | |
| FACILITY OPERATIONS-PROPERTY | US+3 yr | DO, SB, DM |
| MANAGEMENT SEQUENTIAL NUMBER LOGS— | | 00,00,00 |
| Property logs | | |
| FACILITY OPERATIONS-SECURITY ACCESS | AC+2 yr | DO, SB, DM |
| RECORDS—Documents the issuance of keys, | AC=Until superseded, date of | 20,02,211 |
| identification cards, passes, passwords, etc. | expiration, or date of termination, | |
| , F, F, | whichever is sooner | |
| FACILITY OPERATIONS-SURPLUS PROPERTY | PM | DO, DM |
| SALE REPORTS | | - , |
| FACILITY OPERATIONS-UTILITY USAGE | 1 yr | DO, DM |
| REPORTS | | |
| FACILITY OPERATIONS-VEHICLE OPERATION | 1 yr | DO, DT |
| LOGS | | |
| FISCAL-ACCOUNTS PAYABLE/RECEIVABLE | FE+3 yr | DO, SB |
| LEDGERS | | |
| FISCAL-ANNUAL FINANCIAL REPORTS | PM | DO, SB, DM, DT |
| FISCAL-RESERVE ACCOUNT INVESTMENT | FE+4 yr | DO, SB |
| STATEMENTS | | |
| FISCAL-ANNUAL OPERATING BUDGETS AND | FE+3 yr | DO, SB, DM, DT |
| APPROVED REVISIONS | | |
| FISCAL-APPROPRIATION REQUESTS—Includes | FE+3 yr | DO, SB, DM, DT |
| any supporting documentation in the appropriation | | |
| request | | |
| | | |
| | | |

| AC—After closed, terminated, completed, expired, settled, or last date of contact FE—Fiscal Year End (June 30th) RECORDS DESCRIPTION PM DO, SB DO, SB DO, SB PE+3 yr DO, SB, DM, DT DO, SB, DM, DT DO, SB PM DO, SB TISCAL-EXPENDITURE VOUCHERS—Travel, payroll, etc. AC+6 yr AC=6rd offinancial reports, salary reports, etc. FISCAL-EXPENDITURE VOUCHERS—Travel, payroll, etc. PISCAL-EXPENDITURE VOUCHERS—Travel, Payroll, etc. PM DO RECORDS DESCRIPTION DO, SB, DM, DT AC=81 yr DO | Retention Codes | | |
|--|--|--------------------------------|------------------|
| settled, or last date of contact FE—Fiscal Year End (June 30th) RECORDS DESCRIPTION RETENTION PERIOD PISCAL-FINAL AUDIT REPORTS PM DO, SB FISCAL-FINAL AUDIT REPORTS PM DO, SB FISCAL-PAYMENT RECORDS AND SUMMARIES FISCAL-CANCELLED CHECKS— Stubs/Warrants/Drafts FISCAL-CANCELLED CHECKS— Stubs/Warrants/Drafts FISCAL-CAPITAL ASSET RECORDS LA+3 yr DO, SB, DM, DT FISCAL-CAPITAL ASSET RECORDS LA+3 yr DO, SB FISCAL-CAPITAL ASSET RECORDS FISCAL-DEEDS AND EASEMENTS—Proof of ownership and right-of-way on property FISCAL-DEEDS AND EASEMENTS—Proof of ownership and right-of-way on property FISCAL-EXPENDITURE JOURNAL OR REGISTER FISCAL-EXPENDITURE JOURNAL OR REGISTER FISCAL-EXPENDITURE JOURNAL OR REGISTER FISCAL-EXPENDITURE VOUCHERS—Travel, payroll, etc. FISCAL-EXPENDITURE VOUCHERS—Travel, payroll, etc. FISCAL-FEDERAL TAX RECORDS—Includes FICA records FISCAL-FEDERAL TAX RECORDS—Includes FICA records FISCAL-FEDERAL FUNDING RECORDS—Title I; FISCAL-FEDERAL FUNDING RECORDS—Title I; FORM DO PM DO PM DO, SB DO, SB PF+3 yr DO, SB, DM, DT AC= Termination of employment FISCAL-FEDERAL FUNDING RECORDS—Title I; FORM DO PM DO PM DO SB, DM, DT AC= Termination of employment FISCAL-FEDERAL FUNDING RECORDS—Title I; FORM DO PM DO ON SB, DM, DT AC= Termination of final expects and financial reports, selar yreports, etc. FISCAL-FEDERAL FUNDING RECORDS—Title I; FORM DO ON SB, DM, DT AC= Termination of final expects and financial reports and fi | | I AI ife of Asset | DO _ District |
| SB—School Buildings DM—District Maintenance DT—District Maintenance DT—District Transportation | | | |
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| RECORDS DESCRIPTION FISCAL-FINAL AUDIT REPORTS FISCAL-BANK STATEMENTS FE+3 yr DO, SB FISCAL-BANK STATEMENTS FE+3 yr DO, SB FISCAL-CANCELLED CHECKS— Stubs/Warrants/Drafts FISCAL-CANCELLED CHECKS— Stubs/Warrants/Drafts FISCAL-CASH RECORDS FISCAL-CASH RECORDS—Cash deposit slips; cash receipts log FISCAL-CASH RECORDS—Cash deposit slips; cash receipts log FISCAL-DEEDS AND EASEMENTS—Proof of ownership and right-of-way on property FISCAL-CASH RECORDS—One for all accounts in use for a fiscal year FISCAL-EXPENDITURE JOURNAL OR REGISTER FISCAL-EXPENDITURE JOURNAL OR REGISTER FISCAL-EXPENDITURE VOUCHERS—Travel, payroll, etc. FISCAL-EXPENDITURE VOUCHERS—Travel, i.e. federal financial reports, salary reports, etc. FISCAL-FEDERAL TAX RECORDS—Includes FICA records FISCAL-FEDERAL FUNDING RECORDS—Title I; Chapter 2; IDEA Part B FISCAL-FEDERAL—USDA AC+3 yr AC=submission of final expenditure FISCAL-GENERAL LEDGERS; GENERAL JOURNAL VOUCHERS FISCAL-GRANTS—State and Federal AC+3 yr AC=submission of final expenditure FISCAL-GRANTS—State and Federal AC+3 yr AC=End of grant or satisfaction of all uniform administrative requirements may vary depending on the specific federal funding agency FISCAL-INSURANCE CLAIM FILES AC+3 yr DO FISCAL-INSURANCE CLAIM FILES AC+3 yr DO FISCAL-INSURANCE CLAIM FILES AC+3 yr DO FISCAL-FIDERAL TAX FIRE TAX FIRE TORD TORD TORD TORD TORD TORD TORD TORD | | | |
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| agency FISCAL-INSURANCE CLAIM FILES AC+3 yr DO | | | |
| FISCAL-INSURANCE CLAIM FILES AC+3 yr DO | | _ | |
| | PROCEED INCOME OF A PARTY TO | | D.O. |
| AC=Resolution of claim | FISCAL-INSURANCE CLAIM FILES | | DO |
| | | AC=Resolution of claim | |
| | | | |
| | | | |

| Retention Codes | | |
|--|---------------------------------------|----------------------|
| AC—After closed, terminated, completed, expired, | LA —Life of Asset | DO – District |
| settled, or last date of contact | PM—Permanent | Office |
| FE—Fiscal Year End (June 30 th) | US—Until Superseded | SB – School |
| 12 Tisout Tout End (out 50) | es chur superseuru | Buildings |
| | | DM – District |
| | | Maintenance |
| | | DT – District |
| | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | |
| FISCAL-INSURANCE POLICIES—all types | AC+6 yr | DO |
| | AC=expiration or termination of | |
| | policy according to its terms | |
| FISCAL-LONG-TERM LIABILITY RECORDS— | AC+4 yr | DO |
| Bonds, etc | AC=retirement of debt | |
| FISCAL-RECEIPTS JOURNAL OR REGISTER | FE+3 yr | DO, SB, DM, DT |
| FISCAL-RECONCILIATIONS | FE+3 yr | DO, SB |
| FISCAL-REIMBURSABLE ACTIVITIES—Requests | FE+3 yr | DO, SB |
| and approval for reimbursed expenses for travel, | | |
| training, etc. | ACI 2 | DO CD |
| FISCAL-RETURNED CHECKS—Uncollectable | AC+3 yr AC=After deemed uncollectible | DO, SB |
| warrants or drafts FISCAL-SIGNATURE AUTHORIZATIONS— | US+FE+3 vr | DO |
| Records authorizing an employee to initiate financial | US+FE+3 yr | DO |
| transactions for agency. Also, spending authority limits | | |
| LEGAL-LITIGATION FILES | PM | DO, SB, DM, DT |
| EEGAL ETTOATION TILES | CAUTION: May contain | DO, 5D, DN, D1 |
| | attorney-client privileged | |
| | information | |
| LEGAL-OPEN RECORDS REQUESTS— | PM | DO |
| documentation relating to approved or denied requests | | |
| for records under Idaho Public Records Law | | |
| LEGAL-OPINIONS AND ADVICE—Does not include | PM | DO, SB |
| legal opinions or advice rendered on a matter in | CAUTION: May contain | |
| litigation or with regard to pending litigation | attorney-client privileged | |
| | information | |
| INSTRUCTIONAL—Distance learning instruction that | Two months following the end | Electronic |
| is recorded by the District. Such recording is not | of the semester/trimester. | |
| required by this policy. INSTRUCTIONAL—Records on annual cumulative | 5 years often last was | SB |
| effect use of copyrighted materials and proof of | 5 years after last use. | SB |
| permission to use copyrighted materials | | |
| NEWS OR PRESS RELEASES | PM | DO, SB |
| PERSONNEL-ACCUMULATED LEAVE | AC+6 yr | DO, SB, DM, DT |
| ADJUSTMENT REQUEST—Used to create and adjust | AC=Termination of | 20,00,011,01 |
| employee leave balances | employment | |
| PERSONNEL-APPLICATIONS FOR | AC+5 yr | DO, SB, DM, DT |
| EMPLOYMENT—HIRED—Applications, etc. required | AC=Termination of employment | |
| by employment advertisement | | |
| PERSONNEL-APPLICATIONS FOR | AC+2 yr | DO, SB, DM, DT |
| EMPLOYMENT—NOT HIRED—Applications, | AC=Date position is filled | |
| resumes, etc. required by employment advertisement | | |

| Retention Codes | | |
|---|-------------------------------------|----------------------|
| AC—After closed, terminated, completed, expired, | LA —Life of Asset | DO – District |
| settled, or last date of contact | PM—Permanent | Office |
| FE—Fiscal Year End (June 30 th) | US—Until Superseded | SB – School |
| TE Tiscar Tear End (June 30') | CB Chili Superseded | Buildings |
| | | DM – District |
| | | Maintenance |
| | | DT – District |
| | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | 1 |
| PERSONNEL-BENEFIT PLANS | PM if current, | DO |
| | US+6 yr | |
| | | |
| PERSONNEL-COMPLAINT RECORDS—Complaints | FE+3 yr | DO, SB, DM, DT |
| received and records documenting their resolution | CAUTION: If a complaint | |
| | becomes the subject of litigation, | |
| | it is subject to a longer retention | |
| | period | |
| PERSONNEL-CORRECTIVE ACTION—those | PM | DO, SB, DM, DT |
| actions which do not affect pay, status, or tenure and are | CAUTION: If during the retention | |
| imposed to correct or improve job performance | period these records are used to | |
| | support personnel disciplinary | |
| | action, the records should be | |
| | retained according to Personnel | |
| DEDGONNEL DIGGIDI DIA DVI A CTIONI | Disciplinary Action series. | DO CD DM DT |
| PERSONNEL-DISCIPLINARY ACTION | PM | DO, SB, DM, DT |
| DOCUMENTATION—those actions that affect pay or status. They include demotion, dismissal, etc. | | |
| PERSONNEL-EMPLOYEE STATEMENTS | PM | DO, SB, DM, DT |
| (Affidavits)—for insurance, personnel or other uses for | 1 141 | DO, SB, DNI, D1 |
| which administration has sought such statements | | |
| PERSONNEL-EMPLOYEE BENEFITS—documents | AC+6 yr | DO |
| relating to selection of benefits other than insurance | AC= Termination of | |
| relating to selection of centeria other than insurance | employment | |
| PERSONNEL-EMPLOYEE COUNSELING | PM | DO, SB, DM, DT |
| RECORDS—Notes, etc. relating to job-specific | | - , . , , |
| counseling | | |
| PERSONNEL-EMPLOYEE DEDUCTION | AC+5 yr | DO |
| AUTHORIZATIONS—documents relating to all | AC=After termination of | |
| deductions of pay | employee or after amendment, | |
| | expiration, or termination of | |
| | authorization, whichever is | |
| | sooner. | |
| PERSONNEL-EMPLOYEE EARNINGS RECORDS | PM | DO |
| PERSONNEL-EMPLOYEE INSURANCE | AC+6 yr if current | DO |
| RECORDS—District copy of selection records by | AC= Termination of | |
| employees of insurance offered by the District | employment, | |
| DEDCONNEL EMBLOYEE DECOCNITION | US+ 5 yr | DO CD DM DE |
| PERSONNEL-EMPLOYEE RECOGNITION RECORDS: Awards in continue at a | PM | DO, SB, DM, DT |
| RECORDS—Awards, incentives, etc. | 2 | DO |
| PERSONNEL-EMPLOYMENT ANNOUNCEMENT PERSONNEL EMPLOYMENT CONTRACTS | 2 yr | DO |
| PERSONNEL-EMPLOYMENT CONTRACTS | Original dates of hire +50 yr | DO |

| Retention Codes | | |
|--|--------------------------------|----------------------|
| AC—After closed, terminated, completed, expired, | LA—Life of Asset | DO – District |
| settled, or last date of contact | PM—Permanent | Office |
| FE—Fiscal Year End (June 30 th) | US—Until Superseded | SB – School |
| FE—Piscal Teal Eliu (Julie 30) | 05—Onth Superseded | Buildings |
| | | DM – District |
| | | Maintenance |
| | | DT – District |
| | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | Transportation |
| PERSONNEL-EMPLOYMENT ELIGIBILITY— | PM | DO |
| Documentation or verification of Federal report form | | |
| INS I-9 | | |
| PERSONNEL-EMPLOYMENT SELECTION | 5 yr CAUTION: Does not include | DO, SB, DM, DT |
| RECORDS—all records that document the selection | criminal history checks | , , , |
| process: i.e. polygraph, physicals, interview notes, etc. | j | |
| PERSONNEL-FORMER EMPLOYEE | PM | DO |
| VERIFICATION RECORDS—minimum information | | |
| includes name, social security number, exact dates of | | |
| employment and last known address | | |
| PERSONNEL-GRIEVANCE RECORDS—review of | PM | DO, SB, DM, DT |
| employee grievances against policies and working | | |
| conditions, etc. Includes record of actions taken. | | |
| PERSONNEL-HIRING PROCESS—CRIMINAL | PM | DO |
| HISTORY CHECKS—criminal history record | | |
| information on job applications | | |
| PERSONNEL-JOB PROCEDURE RECORD/JOB | US+8 yr | DO, SB, DM, DT |
| DESCRIPTION—any document detailing duties of | | |
| positions on position-by-position basis | | |
| PERSONNEL-LEAVE STATUS REPORT— | FE+3 yr | DO |
| cumulative report for each pay cycle showing leave | | |
| status | | |
| PERSONNEL-LIABILITY RELEASE FORM— | PM | DO |
| statements of employees, patrons, etc. who have released | | |
| the District from liability | | |
| PERSONNEL-LICENSE AND DRIVING RECORD | PM | DO, DT |
| CHECK | | |
| PERSONNEL-OVERTIME AUTHORIZATION & | 5 yr | DO, SB, DM, DT |
| SCHEDULE | | 7.0 |
| PERSONNEL-PAYROLL-DIRECT DEPOSIT | AC+6 yr | DO |
| APPLICATION/AUTHORIZATION | AC= Termination of | |
| | employment | |
| BEDGONNEL DAVIDOLL DIGOLE ADMIGIT COM | US+3 yr | DO. |
| PERSONNEL-PAYROLL-INCOME ADJUSTMENT | AC+6 yr | DO |
| AUTHORIZATIONused to adjust gross pay, FICA, | AC= Termination of | |
| retirement or compute taxes | employment | |
| DEDCONNEL DAVDOLL Comistante de la comis | US+3 yr | DO |
| PERSONNEL-PAYROLL-Garnishment agreements and related revisions | AC+3 yr AC= Termination of | DO |
| and related revisions | | |
| DEDCONNEL DEDECOMANCE EVALUATION | employment PM | DO CD DM DT |
| PERSONNEL PERFORMANCE EVALUATION DEDSONNEL DEDSTENDOLLMENT FILE | | DO. SB, DM, DT |
| PERSONNEL-PERSI ENROLLMENT FILE PERSONNEL-PERSI RECORD OF HOURS | PM Date of hire +50 yr | DO DO |
| WORKED—Irregular help, half-time or greater | Date of fife +30 yr | טע |
| worked—meguiai neip, nan-time or greater | | |

| DISTRICT RECORDS RETENTION SCHEDULE | | |
|--|--|----------------------|
| Retention Codes | TA T'C CA | DO D' |
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| | | Buildings |
| | | DM – District |
| | | Maintenance |
| | | DT – District |
| DECORDE PERCENTAGE | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | |
| PERSONNEL-PERSI TERMINATION RECORD | PM | DO |
| PERSONNEL-PERSONNEL INFORMATION— | PM | DO |
| documents that officially change pay, titles, benefits, etc. | | |
| PERSONNEL-POLICY AND PROCEDURES | PM | DO, SB, DM, DT |
| MANUAL—any manual, etc. that establishes standard | | |
| employment procedures | | |
| PERSONNEL-RESUME-UNSOLICITED | 1 yr | DO, SB, DM, DT |
| PERSONNEL-SICK LEAVE POOL | LA+3 yr | DO |
| DOCUMENTATION—requests submitted, approvals, | | |
| number of hours transferred in an out, etc. | | |
| PERSONNEL-TIME CARD AND TIME SHEET | PM | DO, SB, DM, DT |
| PERSONNEL-TIME OFF AND/OR SICK LEAVE | 5 years | DO, SB, DM, DT |
| REQUEST | | |
| PERSONNEL-TRAINING AND EDUCATIONAL | PM | DO, SB, DM, DT |
| ACHIEVEMENT RECORD-INDIVIDUAL—records | | |
| documenting training, testing, or continued education | | |
| PERSONNEL-UNEMPLOYMENT CLAIM RECORD | 5 yr | DO |
| PERSONNEL-UNEMPLOYMENT | AC+5 yr | DO |
| COMPENSATION RECORDS | | |
| PERSONNEL-W-2 & W-4 FORMS | 5 yr from date of termination | DO |
| PERSONNEL—WORKER'S COMPENSATION | AC+10 yr | DO |
| POLICIES | AC=expiration of policy | D.O. |
| PROCUREMENT-PERFORMANCE BOND—bonds | PM | DO |
| posted by individuals or entities under contract with | | |
| District | | |
| PROCUREMENT-PURCHASING LOG—Log, etc. | FE+3 yr | DO, SB, DM, DT |
| providing a record of purchase orders issued, orders | | |
| received, etc. | | |
| PROCUREMENT-BID DOCUMENTATION— | FE+3 yr | DO, DM, DT |
| includes bid requisition/authorizations, invitation to bid, | CAUTION: If a formal written | |
| bid specifications, and evaluations | contract is the result of a bid, etc., | |
| | the bid and its supporting | |
| | documentation must be retained | |
| | for the same period as the | |
| | contract. | D 0 0D ===== |
| RECORDS MANAGEMENT—RECORDS | PM | DO, SB, DM, DT |
| RETENTION SCHEDULE; DISPOSITION LOG | | |
| (listing records destroyed or transferred); CONTROL | | |
| MATERIALS (indexes, card files, etc.); | | |
| DESTRUCTION APPROVAL SIGN-OFFS | | DO 00 |
| SAFETY-ACCIDENT REPORTS | 8 yrs* | DO, SB, DM, DT |
| | For minors, 8 yrs after minor | |
| | reaches age of 18 | |

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| TE-1 iscar i car Elia (June 50') | OS—Onth Superseded | Buildings |
| | | DM – District |
| | | Maintenance |
| | | DT – District |
| | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | Transportation |
| SAFETY- OCCUPATIONAL INJURY RECORDS | AC+3 yr | DO, SB, DM, DT |
| | AC= Termination of | , , , |
| | employment | |
| SAFETY-DISASTER PREPAREDNESS AND | PM | DO, SB, DM, DT |
| RECOVERY PLANS | | |
| SAFETY-EVACUATION PLANS | PM | DO, SB |
| SAFETY-FIRE ORDERS—issued by fire marshal to | AC+6 yr | DO, SB, DM |
| correct deficiencies in compliance with the fire code | AC=deficiency corrected | |
| SAFETY-HAZARDOUS MATERIALS DISPOSAL | PM | DO, DM |
| RECORDS—Material safety data sheets must be kept | | |
| for those chemicals currently in use that are affected by | | |
| the Hazard Communication Standard in accordance with | | |
| 29 CFR § 1910.1200(g). | | |
| SAFETY-INCIDENT REPORTS—Reports concerning | 6 yr (or 30 yr*) | DO, SB, DM, DT |
| incidents which, upon investigation, were of a non- | *Exposure records require 30 year | |
| criminal nature | retention per 29 CFR § | |
| | 1910.1020(d)(ii)(B)Footnote(1) | D.O. CD. D.L. |
| SAFETY- INSPECTION RECORDS—Fire, safety, and | AC+6 yr | DO, SB, DM |
| other inspection records of facilities and equipment | AC=Date of the correction of the | |
| | deficiency, if the inspection report | |
| SAFETY-MATERIAL DATA SAFETY SHEETS | reveals a deficiency. 30 yrs after the end of use of the | DO, DM |
| SAFETY-MATERIAL DATA SAFETY SHEETS | substance | DO, DM |
| SAFETY-WORKPLACE CHEMICAL LISTS | 30 yr | DO, SB, DM |
| STUDENTS-EDUCATION RECORDS—Student's | As described in Procedure | DO, SB, DM |
| name, birth date, last address, dates of attendance, | 3570P. | ро, зв |
| graduation date and grades earned | 00,01. | |
| STUDENTS-SPECIAL EDUCATION RECORDS— | FE+6 yr except as specified in | DO, SB |
| educational records, including eligibility documentation | Policy 3570P | 20,52 |
| and IEPs | | |
| STUDENTS-MEDICAID RECORDS-claims, | FE +5 yr | DO, SB |
| reimbursements, and supporting documentation | · | ĺ |
| VEHICLE-INSPECTION, REPAIR AND | LA+1 yr | DO, DT |
| MAINTENANCE RECORDS | | |
| VEHICLE-TITLE AND REGISTRATION | 1 yr | DO, DT |
| VOLUNTEER RECORDS—records may include | AC+3 yr | DO, SB |
| recruitment and selection records, volunteer personnel | AC=End of term of volunteer or | |
| and intern personnel information forms, intern | intern | |
| agreements, volunteer and intern time records, | | |
| emergency notification forms, insurance documentation | | |
| and correspondence | | |

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| | | DM – District |
| | | Maintenance |
| | | DT – District |
| | | Transportation |
| RECORDS DESCRIPTION | RETENTION PERIOD | |
| WEBSITE/WEB PAGES— | PM | DO, SB |
| INTERNET/INTRANET—system development | | |
| documentation for initial setup; subsequent changes and | | |
| content of pages | | |

In the event that District records do not correspond to any of the above listed categories, the Superintendent will determine the period of retention for a particular record.

| Cross References: 2150P | Copyright Compliance |
|-------------------------|----------------------|
|-------------------------|----------------------|

3570 Student Records 3570P Student Records

Legal References: IC § 33-508 Duties of Clerk

IC § 33-701(8) Fiscal Year—Payment and Accounting of Funds

IC § 56-209h Administrative Remedies

IC § 67-4131 Records Management Services—Rules,

Guidelines, Procedures

IC § 74-101 Definitions

IC § 74-119 Agency Guidelines

Other References: State Board of Education - Agency Specific Records Retention Schedule

of the Records Management Guide, Idaho Records Center SDE Idaho Special Education Manual, current edition

Policy History:

Adopted on: 10/14/25

Revised on:

Reviewed on: 9/2/25, 10/7/25