

Records Management

The district records officer shall have the responsibility for the safekeeping of all records according to the retention schedule cited below. The district records officer shall have authority to dispose of materials after the recommended retention period.

Official public records have a statutory minimum retention of 6 years. The retention period for office files and memoranda is based on operational requirements for each office. Whenever applicable, the retention period starts with the "cut-off." "Cut-off" is a term used to indicate files or records may be terminated on a predetermined date. "Cut-off" prevents current records from attaining unmanageable size and facilitates the filing of new records. Calendar year records may be "cut-off" on December 31, and a new file established on January 1; all fiscal year records can be "cut-off" only upon the completion of an action or event, such as termination of contract, final payment of a contract, termination of employment, etc. Regardless of the duration of the retention period, records series should be kept in office files after "cut-off" only as long as is necessary to satisfy (1) active reference, (2) audit, when required, and (3) other operational requirements. Once these three factors have been satisfied, the records should be transferred to a records center for the remainder of the retention period.

E-mail messages with public record content should be retained in E-mail format only as long as they are being worked on or distributed. Upon completion, E-mail messages containing public record information should be printed out or transferred to an electronic document management system, filed with the appropriate records series, and retained for the minimum retention period assigned by the Local government General Records Retention Schedule or a records retention schedule approved specifically for the agency by the Local Records Committee.

The district will retain records in compliance with the General Records Retention Schedule For School Districts And Educational Service Districts in Washington State found at:

<http://www.secstate.wa.gov/archives/pdf/School%20Districts%20March%202003.pdf>

The retention period shall be as follows:

Student Records

Student permanent record	Permanent
Cumulative record	5 years after graduation or withdrawal from high school
Confidential reports and records	5 years after graduation or withdrawal from high school
Special services record.....	5 years after graduation or service has been terminated
Student discipline records	2 years

Teacher Records

Elementary teacher grade books	3 years
Secondary teacher grade books.....	5 years after graduation
Lesson plan books.....	1 year
Faculty handbook.....	Until superseded

Individual Schools

Attendance card	3 years
Daily attendance report.....	Until after audit
Field trip authorization (parent)	1 year
Use of private vehicles.....	1 year

Food Services

Cafeteria receipt books	6 years
Daily lunch and milk count report	3 years
Free or reduced price lunch applications	3 years
Meal ticket log	3 years
Purchase orders	6 years
Reimbursement claims.....	6 years
Revenue and expenditure ledger.....	6 years
Time cards.....	6 years

Health Office

Accident injury report.....	5 years after child's 21 ^s birthday
Medication request.....	5 years
Student health card.....	Until graduation

Maintenance

Engineering & architectural drawings	As long as district retains property
Maintenance folder on building	6 years
Work order request	6 years
Mileage claim form.....	6 years
Vandalism report.....	3 years
Laundry checklist.....	6 years
Boiler vessel record.....	Until boiler is disposed of
Budget request	2 years
Rental of school facilities.....	3 years

Transportation

Bus fuel reports	2 years
Bus schedules.....	4 years
Employee time sheet.....	2 years
Bus time sheet.....	4 years
Transportation reports.....	3 years

Purchase orders	6 years
Accident reports	3 years
Transportation requests	6 years

Accounting Services

Cancelled checks	6 years
Check register	6 years
Voucher forms	6 years (used as claims and supporting invoices)
Consultant contracts	6 years
Purchase order	6 years
Warrant registers	6 years
Record of part-time students	Until after audit
Classroom count report	Until after audit
Records supporting ESEA Title I & Title III claims	5 years
Records supporting NDEA Title Va, ESEA Title II claims	3 years
Textbook and library book inventories	Useful life of each item
Cash receipts transmittal forms	6 years
Monthly transmittal of district receipts	3 years
District invoice	6 years
Trial balances	3 years
Receipt books	6 years
County Treasurer Financial Reports	6 years
State apportionment	6 years
Banking records	6 years
State Auditor's Reports	5 years
General ledger	6 years
Deposit slips	Until after audit

Personnel Service

Employee file	6 years
Employment interview forms	2 years
. Employment requisition	2 years
Letters of resignation	6 years
Absence record	6 years
Employee history card	6 years
Application for employment	6 years (hired) 2 years (non-hired)
Letters of recommendation	Termination plus 6 years
Employee contracts	6 years
Professional credit application	6 years
Title IX and affirmative action surveys	6 years

District Payroll

Employee record	6 years after termination
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Personnel pay history record.....	Permanent
Personnel action form	6 years after termination
Time cards.....	Until after audit
Payroll work report	6 years
Teacher sub report.....	6 years
Payroll warrant register.....	6 years
Warrant request form	6 years
Tax sheltered agreements	4 years after expiration
Jury or military service agreements	6 years
Garnishments	6 years
Retirement forms	6 years
Labor & industry quarterly report.....	6 years
Medical insurance	6 years
Payroll deductions	Until termination
Labor & industries accident claims	Permanent
Federal tax returns	4 years

Budget Services

Final budget	Permanent
Annual report of school funds.....	6 years
Monthly financial reports to board	Permanent
Budget status report	2 years

Purchasing

Bids and formal quotes	6 years
Purchasing requisition	3 years
Purchase orders	6 years
Inventory list of district property	6 years after superseded

District

Copies of board minutes and resolutions	Permanent
Verbatim transcripts of meetings	6 years

Associated Student Body

Audits	5 years
Ranking records	6 years
Minutes of meetings	Permanent
Purchase authorizations	6 years
Receipts	6 years
Invoices	6 years
Vouchers	6 years
General ledger	6 years
Warrants	6 years
Budgets	Permanent

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Pateros School District
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