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Dear School District Records Commission:

In an effort to organize and systemize school district Records Retention Schedules and the records retention and disposal process for the State of Ohio, our office has created a suggested Records Retention and Disposal Schedule for your consideration and ultimate adoption.

The enclosed Records Retention Schedule (RC-2) lists common school district records and sets forth suggested retention periods for each. The schedule has been reviewed by both the Ohio Historical Society and the State Auditor's Office. Our goal is to encourage all school districts within the State of Ohio to adopt and follow the suggested schedule. Such action on your part would assist our office in making the records retention and disposal review process more uniform, as well as more cost effective.

Please find enclosed an instruction handout regarding the record retention and disposal process. Follow the instruction handout to create and adopt your records and disposal guidelines, procedures and Record Retention Schedule (RC-2). Also enclosed are copies of appropriate forms which you may copy and use to affect the process.

Questions regarding this mailing packet may be directed to your area Ohio Historical Society-Local Government Records Program or to the State Auditor's Office. Thank You for your attention to this matter. Your assistance in coordinating the system is greatly appreciated.

Sincerely,

*Martin E. Meeks
Records Specialist*

Enclosure

SAMPLE RECORDS DISPOSAL POLICY

The orderly acquisition, storage and retention of school district records is essential for the overall efficient and effective operation of the district. The Board of Education establishes a district records commission to govern matters pertaining to district records, their retention and disposal in accordance with ORC 149.41.

The records commission shall consist of the board president, treasurer, and superintendent. The treasurer shall serve as chairman/secretary of the district records commission. The members of this commission shall appoint necessary records officers through the district to carry out the necessary work associated with district records.

The district records commission shall meet at least once annually to review certificates of records disposal forms (RC-3) as submitted by the records officers. Upon the approval of the commission, such records may be disposed of, pursuant to the following standards:

1. Procedures to dispose of records according to the school district's approved schedule of records retention and disposition (RC-2) will be initiated annually.
2. Records officers will list those eligible, disposable records on the certificate of records disposal (RC-3), in accordance with the district's approved schedule.
3. The records commission shall review the certificates of records disposal forms as submitted, annually.
4. Upon the commission's approval, the certificates (RC-3) will be forwarded as follows:
 - Original -Forward the original to the Ohio Historical Society.
 - Copies -Keep one copy for the Record Commission files.
 - The Ohio Historical Society will send a copy to the State Auditor's office on your behalf. The school district does not need to send a copy to the State Auditor's office.
5. Records shall be destroyed only as directed by the district records secretary.
6. The district records shall develop the necessary regulations and record retention schedules to carry out their purpose.

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>3000</u>	<u>STUDENT RECORDS</u>		
3101	Student Record Folders Bldg Secretary 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) Bldg Secretary	Permanent***	
3103	Cosmetology Records Voc. Secretary (Vocational)	Permanent***	
3201	Health/Medical Records Nurse/Bldg Visual Screening Secretary Hearing Screening Immunization Records	7 Years After Graduation	
3202	Discipline Records Bldg Secretary Letters to Parents Office Discipline	1 Year after Student leaves School	
3203	Psychological Records Special Ed. (Restricted) Secretary/Nurse	Permanent***	
3204	Child Abuse/Neglect Bldg Secretary Referral Letters	Through Graduation	** Provided Audited *** Hard Copy maintained for 5 years after Student leaves system –then microfilmed.
3301	Teacher Grade Books/ Records Bldg Secretary	3 Years**	

**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-LRRP
3302	Pre-School Screening Profiles Bldg Secretary	3 years	
3303	Age and Schooling Records (Work Permits) Bldg Secretary	3 years	
3304	Accident Reports Nurse/Bldg Secretary	5 years provided no action pending	
3305	Individual Educational Plan (IEP) Bldg Secretary Special Ed. Secretary	Permanent	
3306	Free/Reduced Price Lunch Application Bldg Secretary	4 years	
3401	Emergency Information Bldg Secretary	Until 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 or OHS-LGRP
4000	<u>BUILDING RECORDS</u>		
4202	Tornado and Fire Drill Records Bldg Secretary	1 year*	
4203	Building Health Inspections Bldg Secretary	2 years*	
4301	Student Activity Records Bldg Secretary Pay-in forms Pay-out forms Account forms/Dist. Budget forms Requisitions Purchase orders Ticked sale reports	2 years**	
4302	Receipts/Deposit Slips Bldg Secretary	4 years**	
4303	Budget/Appropriation Records Bldg Secretary	4 years**	
4304	Requisitions/ Purchase Orders Bldg Secretary	10 years**	
4401	Textbook Inventories Bldg Secretary	Until Superseded	
4402	Supplies Inventory Bldg Secretary	Until Superseded	
4403	Student Handbooks Bldg Secretary	Until Superseded	
	*After end of fiscal year ** Provided Audited		