

SCHEDULE OF RECORDS RETENTION AND DISPOSITION

Record Title and Description	Retention Period
<u>BOARD RECORDS</u>	
Minutes	Permanent
Audio Tapes	2 Years
Blue Prints, Plans, Maps	Permanent
Deeds, Easements, Leases	Permanent
Board Policy Books and Other Adopted Policies	1 Year After Superseded
Administrative Regulations	1 Year After Superseded
Court Decisions	Permanent
Claims and Litigation	Permanent
Elections	10 Years
Record Disposal Forms (RC-3)	10 Years
Bargaining Agreements	10 Years After Expiration
Budget Policy Files	5 Years
Worker's Compensation Claims	10 Years After Financial Payment Made
Bank Depository Agreements	4 Years After Completion

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Record Title and Description	Retention Period
<u>BOARD RECORDS</u> (cont'd)	
Organization Reports	2 Years**
Board Meeting Notes	1 Year
Agendas	1 Calendar Year **
Adopted Courses of Study	Until Superseded
Adopted Special Education Programs	Until Superseded
Adopted Special Programs	Until Superseded
Employees Files (Employment Applications, Resumes, Contracts/Salary Notices, Evaluations, Personnel Actions, Absence Certification, Transcripts And Any Other Documents Which, Become Part of the File.)	
Certified Active Employees	Permanent
Classified Active Employees	Permanent
Certificated Inactive Employees	Permanent***

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<u>BOARD RECORDS</u> (cont'd)	
Classified Inactive Employees	Permanent***
Civil Rights, Civil Services, and Disciplinary Reports	Permanent***
Retirement Letters	Permanent***
Substitute Records	25 Years
Employee Contracts	4 Years After Termination From Employment
Professional Conference Applications	2 Years **
Irregular Employee Contracts (Substitutes, etc.)	4 Years After Contract Expires
Unemployment Claims	5 Years
Unemployment	5 Years
Applications (Not Hired)	2 Years**
Schedules of Employees	Fiscal Year Plus 2 years
Student Helper Applications	2 Years
Teacher Personnel Reports (Internal)	Fiscal Year Plus 1 Year
I-9 Immigration Verification Forms	Termination of Employment Plus 1 Year
Job Description	Retain until superceded or obsolete

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Record Title and Description	Retention Period
<p><u>STUDENT RECORDS</u></p> <p>Student Record Folders Enrollment/Withdrawal Information Grades/Transcripts Activities Record Attendance Records Individual Test Results Standardized Competency/Proficiency Aptitude Intervention Records Foreign Exchange Records Suspension/Expulsions Home Schooled Student Records</p> <p>Office Record Card (K-9)</p> <p>Cosmetology Records (Vocational)</p> <p>Health/Medical Records Visual Screening Hearing Screening Immunization Records</p> <p>Discipline Records Letters to Parents Office Discipline</p> <p>Psychological Records (Restricted)</p> <p>Child Abuse/Neglect Referral Letters</p> <p>Teacher Grade Books/Records</p>	<p>Permanent***</p> <p>Permanent***</p> <p>Permanent***</p> <p>7 Years After Graduation</p> <p>1 Year After Student Leaves School</p> <p>Permanent***</p> <p>Through Graduation</p> <p>3 Years**</p>

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<u>STUDENT RECORDS</u> (cont'd)	
Pre-School Screening Profiles	3 Years
Age And Schooling Records (Work Permits)	3 Years
Accident Reports	5 Years Provided No Action Pending
Individual Education Plan (IEP)	Permanent
Free/Reduced Price Lunch Application	4 Years
Emergency Information	Until Superseded
<u>BUILDING RECORDS</u>	
Tornado and Fire Drill Records	1 Year*
Building Health Inspections	2 Years*
Student Activity Records Pay-In Forms Pay-Out Forms Account Forms/District Budget Forms Requisitions Purchase Orders Ticket Sale Reports	2 Years**
Receipts/Deposits Slips	4 Years**
Budget/Appropriation Records	4 Years**
Requisitions/Purchase Orders	10 Years**
Textbook Inventories	Until Superseded
Supplies Inventory	Until Superseded
Student Handbooks	Until Superseded

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Record Title and Description	Retention Period
<u>ADMINISTRATIVE RECORDS</u>	
School Calendars	5 Years
Repair, Installation, and Maintenance Records	4 Years**
Prevailing Wage Records	4 Years**
Rental Information (Use of Facilities)	4 Years**
Work Orders	4 Years**
Environmental Reports And Data (asbestos, etc.)	4 Years**
Vandalism Reports	4 Years**
Student Activity Purpose Clauses	4 Years**
Sales Potential Forms (Student Activities)	4 Years**
Bids and Specifications (Unsuccessful)	1 Year**
Bids and Specifications (Successful)	4 Years After Completion of Project**

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Record Title and Description	Retention Period
<u>ADMINISTRATIVE RECORDS</u> (cont'd)	
Contractor Files (Resolutions, Additions, Drawings, etc.)	Until Project Complete, if No Action Pending**
Preventive Maintenance Reports	Fiscal Year Plus 2 Year
Warranty/Guarantee	Life/Warrant of Equipment
Plant and Equipment Inventory	Until Superseded**
Textbook/Workbook Inventory	Until Superseded**
Supplies Inventory	Until Superseded**

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Record Title and Description	Retention Period
<u>SPECIAL EDUCATION RECORDS</u>	
Special Education Tutoring Reports	10 Years
Individual Educational Plan (IEP)	Permanent
Psychological Records (Restricted)	Permanent***
<u>TRANSPORTATION RECORDS</u>	
Driver Physical	2 Years After Termination
Fuel Consumption Data	4 Years**
Transportation Records	4 Years**
Field Trip Forms and Volunteer Driver Forms	Fiscal Year Plus 2 Years
Accident Reports	3 Years Provided No Action Pending
Vehicle Registration	Life of Vehicle
Vehicle License	1 Year After Termination
Driver Certifications	1 Year After Termination

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<u>TRANSPORTATION RECORDS</u> (cont'd)	
Supplies Inventory	Until Superseded**
Vehicle Defect Report	Life of Vehicle
<u>FOOD SERVICE RECORDS</u>	
Food Service Records Menus Food Production Milk Sold Students Served	4 Years**
Lunchroom Records Cash Register Tapes Cashier's Daily Reports	4 Years**
Lunchroom Reports (Free and Reduced)	4 Years**
Inventories	Until Superseded**
Lunchroom License	1 Year After Expiration

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Record Title and Description	Retention Period
<p><u>FINANCIAL RECORDS</u></p> <p>Annual Financial Reports Appropriation Ledgers Budget Ledgers Revenue Ledgers Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports Financial Summary Detail Reports</p> <p>Activity Fund Cash Journal and Ledger</p> <p>Bond Register</p> <p>Securities</p> <p>Investment Ledger</p> <p>Foundation Distribution</p> <p>Tax Settlements (Semi-Annual) and Advances</p> <p>Budgets (Annual)</p> <p>Insurance Policies</p>	<p>5 Years**</p> <p>5 Years**</p> <p>20 Years After Issue Expires</p> <p>Permanent***</p> <p>5 Years**</p> <p>5 Years**</p> <p>5 Years**</p> <p>5 Years**</p> <p>15 Years After Expiration Provided All Claims Settled</p>

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<u>FINANCIAL RECORDS</u> (cont'd)	
Contracts	15 Years After Expiration
Bonds and Coupons	Until Redeemed**
Accounts Payable Ledgers	5 Years**
Account Receivable Ledgers	5 Years**
Budget Work Papers	5 Years**
Vouchers, Invoices and Purchase Orders	10 Years**
State Program Files Aux. Services, DPPF, Adult Vocational Excess Lottery, Data Processing, Public/Private Grants, etc.	10 Years **
Federal Program Files Title I, II, III, IV-B IV-C, & VI-B; Chapter 1, 2; Drug Free, etc.	10 Years**
Travel Expenses Vouchers	10 Years**
Tax Anticipation Notes (Records Borrowing Against Future Tax Collections)	10 Years**

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Record Title and Description	Retention Period
<u>FINANCIAL RECORDS</u> (cont'd)	
State Reimbursement Settlement Sheets	5 Years**
Unemployment Claims	5 Years
Employee Bonds, Board Member Bonds	5 Years
Certificate of Estimated Resources	15 Years After Expiration
Appropriation Resolutions	5 Years
Tax Appointments (Semi-annual)	5 Years
Canceled Checks and Bank Settlements	4 Years**
Publication Notice	4 Years**
Tuition Fees and Payments	4 Years**
School Finance (S.F.) Monthly Statements	4 Years**
Investment Records (May Include Individual Record of Investments, Bank Confirmation, Wire Transfers, Copy of CD, etc.)	4 Years**
Travel Expense Reports	10 Years**
State Sales Tax Reports	4 Years**

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<u>FINANCIAL RECORDS</u> (cont'd)	
Student Activity Fund (Pay-Ins. Pay-Outs. Receipts/Deposits, Reports)	4 Years**
Check Registers	4 Years**
Deposit Slips/Cash Proofs	4 Years**
Bids and Specifications (Unsuccessful)	1 Year**
Bids and Specifications (Successful)	4 Years After Completion of Project**
Receipt Books	4 Years**
Extra Trip Records	4 Years**
Monthly Financial Reports	4 Years**
Accounting Data	4 Years**
Service Contracts	4 Years**
State Subsidy Reports Application for Driver Education. Student Transportation. Special Education, etc.	3 Years**
Delivery/Packing Slips	1 Year**
Requisitions	1 Year*

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Record Title and Description	Retention Period
<p><u>PAYROLL RECORDS</u></p> <p>Payroll Ledgers Bi-Weekly Payroll Reports. Quarterly Payroll Reports</p> <p>Earnings Registers By Staff Member By Calendar Year</p> <p>Monthly Payroll Reports Leave Usage And Accumulation. Retirement Service. etc.</p> <p>Bureau of Employment Service Quarterly Reports</p> <p>W-2's. W-4's (Employer Copy)</p> <p>Federal Income Tax (Quarterly/Annual)</p> <p>Ohio Income Tax (Monthly/Annual)</p> <p>City Income Tax (Monthly/Annual)</p> <p>School Income Tax (Monthly/annual)</p> <p>Payroll Reports Reports Used for Each Payroll – Computer Generated</p>	<p>Permanent***</p> <p>Permanent***</p> <p>Permanent***</p> <p>7 Years</p> <p>6 Years and Current**</p> <p>6 Years and Current**</p> <p>6 Years and Current**</p> <p>6 Years And Current**</p> <p>6 Years and Current**</p> <p>4 Years**</p>

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Record Title and Description	Retention Period
<u>PAYROLL RECORDS</u> (cont'd)	
Payroll Update Listing	4 Years**
Payroll Calculations	4 Years**
State Teachers System And School Employees Retirement System Waivers	Permanent***
State Employees Retirement System (SERS)	4 Years**
State Teachers Retirement System (STRS) Reports	4 Years**
Annuity Reports	4 Years**
Benefit Folders/Reports	4 Years**
Employee Request and/or Authorization For Leave Forms (Sick, Vacation, Personal, or Other Leave)	4 Years**
Deduction Reports Voluntary Payroll Deductions	4 Years**
Employee Vacation/Sick Leave Records	4 Years**
Time Sheets	6 Years**

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<u>PAYROLL RECORDS</u> (cont'd)	
Overtime Authorization	6 Years
Employee Insurance Bills Medical Dental Life	4 Years**
Paycheck Register	4 Years**
Payroll Bank Statement	4 Years**
Deduction Authorization	Until Superseded or Employee Terminated
<u>REPORTS</u>	
State Audit Reports	5 Years
#59, #659 and #4502	5 Years
#25 and #625	5 Years
School Finance (S.F.) Reports – Annual	5 Years
Special Education (S.E.) Reports – Annual	7 Years
Vocation Education (V.E.) Reports – Annual	5 Years
Ohio Common Core Data (OCCD) Reports	5 Years

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<u>REPORTS</u> (cont'd)	
Drivers Education Reports	5 Years
Ohio Department of Education (ODE) Reports	5 Years
Civil Rights Reports	Permanent***
Title IX Reports	10 Years
SM-1 & SM-2 (Annual and Quarterly)	10 Years
State Minimum Standards	10 Years
Personnel State Reports (Currently SF-1, CS-1)	4 Years**
Worker's Comp Wage Reports (C. Auditor)	5 Years
Bank Balance Certification (Co. Auditor)	5 Years
Transportation Reports	4 Years**
<u>OTHER</u>	
Personnel Directory	10 Years
Employment Record (By Grade and Building)	Permanent***
School Calendars	5 Years

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<p><u>OTHER</u> (cont'd)</p> <p>Building, Boiler, Maintenance Reports</p> <p>Employee Handbooks</p> <p>Directives, Standards, Laws for Local, State and Federal Governmental Agencies</p> <p>Attendance Records</p> <p style="text-align: center;">*After End of Fiscal Year **Provided Audited</p> <p>***Hard Copy maintained for 5 Years. Then Microfilmed</p>	<p>2 Years*</p> <p>Until Superseded</p> <p>Until Superseded</p> <p>Until Superseded</p>

Form RC-2, Ohio Historical Society

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