

**RECORDS MANAGEMENT
(SCHEDULE OF RECORDS RETENTION AND DISPOSITION)**

(1) TO: _____

(2) FROM: Westerville City School District, Office of the Treasurer

(3) CERTIFICATION: I hereby certify that the District's records commission will make every effort to prevent these record series from being destroyed, transferred, or otherwise disposed of in violation of this schedule and that no record will be knowingly disposed of which pertains to any pending case, claim, action or request. When records listed on this form are to be microfilmed and the originals destroyed, please stipulate.

Authorized department official:

Signature and Title Date

(4) Approvals:
Chairman, Records Committee:

Signature Date

Ohio Historical Society:

Signature Date

Auditor of State:

Signature Date

(5) Schedule Number	(6) Record title and description	(7) Retention Period	(8) Media Type	(9) For use by approving agencies
1000	BOARD AND ADMINISTRATIVE RECORDS			
1101	Minutes Treasurer	2 years * Permanent	Paper Electronic	
1101.1	Audio/Video Tapes Treasurer	2 years *	Electronic	
1102	Blueprints, Plans, Maps Executive Director of Business Services	Permanent	Paper	
1103	Deeds, Easements, Leases Treasurer	Permanent	Paper	
1104	Board Policy Books and Other Adopted Policies Superintendent	1 year after superseded	Electronic	
1105	Administrative Regulations Superintendent	1 year after superseded	Electronic	
1106	Court Decisions Treasurer	Permanent	Paper	
1107	Claims and Litigation Treasurer	5 years after closed	Paper	
1201	Elections Treasurer	10 years	Paper	

* After end of fiscal year

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1202	Record Disposal Forms (RC-3) Treasurer	10 years	Paper	
1203	Bargaining Agreements Treasurer/Executive Director of Labor Relations	10 years after expiration	Electronic	
1204	Budget Policy Files Treasurer	5 years	Paper	
1301	Worker's Compensation Claims Treasurer	7 years	Paper/Electronic	
1302	Bank Depository Agreements Treasurer	4 years after completion	Paper/Electronic	
1303	Organization Reports Treasurer	2 years **	Paper/Electronic	
1304	Board Meeting Notes Treasurer	1 year	Paper	
1305	Agendas Superintendent	1 year **	Paper/Electronic	
1401	Adopted Courses of Study Superintendent	Until superseded	Paper/Electronic	
1402	Adopted Special Education Programs Superintendent	Until superseded	Paper/Electronic	
1403	Adopted Special Programs Superintendent	Until superseded	Paper/Electronic	
1450	Email & Voicemail Each Department	Discretionary - Until no longer of value	Electronic	
2000	EMPLOYEE RECORDS			
	(Employee Files include employment applications, resumes,			
2101	Certificated Active Employees Executive Director of Human Resources (Certified & Classified)	2 years	Paper	
		Permanent	Electronic	
2102	Classified Active Employees "	2 years	Paper	
		Permanent	Electronic	
2103	Certificated Inactive Employees "	2 years	Paper	
		Permanent	Electronic	

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2104	Classified Inactive Employees	2 years Permanent	Paper Electronic	
2105	Civil Rights, Civil Service and Disciplinary Reports	2 years Permanent	Paper Electronic	
2107	Retirement Letters	2 years Permanent**	Paper Electronic	
2108	Substitute Records	2 years 25 years**	Paper Electronic	
2301	Employee Contracts and Salary Notices	2 years Permanent**	Paper Electronic	
2303	Irregular Employee Contracts (Substitutes, etc.)	2 years after contract expires	Paper/Electronic	
2304	Unemployment Claims	Treasurer 5 years	Paper/Electronic	
2305	Unemployment Records	Treasurer 5 years	Paper/Electronic	
2306	Applications (not hired)	Executive Director of Human Resources 2 years**	Paper/Electronic	
2307	Schedules of Employees	Executive Director of Human Resources Until superseded	Paper/Electronic	
2308	Student Helper Applications	" 2 years	Paper/Electronic	
2309	Teacher Personnel Reports (Internal)	" Fiscal year plus 1 year	Paper/Electronic	
2310	I-9 Immigration Verification Forms	" Termination of employment plus 1 year	Paper	
2401	Job Descriptions	" Until superseded or obsolete	Paper	
2402	Fingerprint Records	" Until superseded	Paper	
3000	STUDENT RECORDS			

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3101	Student Record Folders Enrollment/Withdrawal Information Grades/Transcripts Activities Record Attendance Records Individual Test Results Standardized Competency/Proficiency Aptitude Intervention Records Foreign Exchange Records Suspensions/Expulsions Home Schooled Student	Bldg. Principal 2 years Permanent	Paper Electronic	
3102	Office Record Card (K-9)	Bldg. Principal 2 years Permanent	Paper Electronic	
3201	Health/Medical Records Visual Screening Hearing Screening/ Immunization Records	Bldg. Principal/Nurse 7 years after graduation	Paper/Electronic	
3202	Discipline Records Letter to Parents Office Discipline	Bldg. Principal 1 year after student leaves school	Paper/Electronic	
3203	Psychological Records (Restricted)	Executive Director of Special Ed./Nurse Last one permanent, all others 2 years after graduation	Paper/Electronic	
3204	Child Abuse/Neglect Referral Letters	Bldg. Principal Through Graduation or 7 years after student withdrew from district	Electronic	
3205	Intervention Records	Bldg. Principal 7 years after graduation	Electronic	
3301	Teacher Grade Book/ Records	Bldg. Principal 3 years**	Paper/Electronic	
3302	Pre-School Screening Profiles	Exec. Director of Student Services 3 years	Paper/Electronic	
3303	Age and Schooling Records (Work Permits)	Bldg. Principal 3 years	Paper/Electronic	

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3304	Accident Reports	Bldg. Principal/Nurse	5 years provided no action pending	Paper/Electronic	
3305	Individual Educational Plan (IEP)	Bldg. Principal	Last one permanent all others 2 years after graduation	Electronic	
3306	Free/Reduced Price Lunch Applications	Bldg. Principal	4 years	Electronic	
3401	Emergency Information	Bldg. Principal	Until superseded	Paper/Electronic	
3402	Parental Correspondence	Bldg. Principal	2 years until no longer of admin value. No RC-3 required	Paper/Electronic	
3403	Tentative Information****	Bldg. Principal	Until the student transfers or transitions to another school, or 5 years after the student graduates or withdraws from the district	Paper/Electronic	
4000	BUILDINGS RECORDS				
4202	Tornado and Fire Drill Records	Bldg. Principal	1 year*	Paper	
4203	Building Health Inspections	Bldg. Principal	1 year*	Paper	
4204	Visitor Registration	Bldg. Principal	1 year**	Paper	
4301	Student Activity Records Pay-In Forms Pay-Out Forms Accounting Forms/Dist. Budget Forms Req/Purchase Orders Ticket Sales Reports	Bldg. Principal	2 years**	Paper	

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4302	Receipts/Deposit Slips	Bldg. Principal	2 years**	Paper	
4303	Budget/Appropriation Records	Bldg. Principal	2 years**	Paper	
4304	Req/Purchase Orders	Bldg. Principal	2 years**	Paper	
4305	Field Trips	Bldg. Principal	2 years**	Paper	
4401	Textbook Inventories	Bldg. Principal	Until superseded	Paper/Electronic	
4402	Supplies Inventories	Bldg. Principal	Until superseded	Paper/Electronic	
4403	Student Handbooks	Bldg. Principal	Until superseded	Paper/Electronic	
4405	Clinic Logs/Slips	Bldg. Principal/Nurse	2 years*	Paper/Electronic	
4406	Attendance Reports	Bldg. Principal	2 years*	Paper/Electronic	
4407	Grade Reports	Bldg. Principal	2 years*	Paper/Electronic	
4408	Building Testing Results	Bldg. Principal	5 years**	Paper/Electronic	
5000	CENTRAL DEPARTMENTAL RECORDS				
	<u>Administrative Offices</u>				
5201	School Calendars	Superintendent	5 years**	Paper/Electronic	
5301	Repair, Installation and Maintenance Records	Exec. Director of Business Services	2 years 4 years**	Paper Electronic	
5302	Prevailing Wage Records	Exec. Director of Business Services	2 years 4 years**	Paper Electronic	
5303	Rental Information (Use of Facilities)	Exec. Director of Business Services	2 years 4 years**	Paper Electronic	
5304	Work Orders	Director of Facilities/ Director of Technology	2 years 4 years**	Paper Electronic	
5305	Environmental Reports and Data (Asbestos, etc.)	Exec. Director of Business Services	2 years 4 years**	Paper Electronic	
5306	Vandalism Reports	Exec. Director of	2 years	Paper	

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	Business Services	4 years**	Electronic	
5307	Student Activity Purpose Clauses	Treasurer 2 years 4 years**	Paper Electronic	
5308	Sales Potential Forms (Student Activities)	Treasurer 2 years 4 years**	Paper Electronic	
5309	Bids and Specifications (Unsuccessful)	Exec. Director of Business Services 1 year**	Paper	
5310	Bids and Specifications (Successful)	Exec. Director of Business Services 4 years after completion of project**	Paper/Electronic	
5311	Contractor Files (Resolutions, additions, Drawings, etc.)	Exec. Director of Business Services Until roject complete, if no action pending**	Paper/Electronic	
5401	Preventative Maintenance Reports	Exec. Director of Business Services Fiscal year plus 2 years	Paper/Electronic	
5402	Warranty/Guarantee	Exec. Director of Business Services Life/Warranty of Equipment	Paper/Electronic	
5403	Plant and Equipment Inventory	Exec. Director of Business Services Until superseded**	Paper/Electronic	
5404	Textbook/Workbook Inventory	Exec. Director of Curriculum Until superseded**	Paper/Electronic	
5407	Boiler Permits	Director of Facilities 5 years/until superseded**	Paper/Electronic	
	<u>Student Activities, Safety, and Communications Dept.</u>			
5215	Custody Affidavits	Exec. Director of Student Activities, Safety & Communications Until Graduation	Paper/Electronic	
5216	I-20 Forms	" Until student leaves system	Paper/Electronic	
5217	Transfer/Open Enrollment	" Length of approval plus 1 year	Paper/Electronic	
5218	SF-14 Reports	" 5 years**	Paper/Electronic	

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5219	Student Expulsions	"	3 years**	Paper/Electronic	
5320	Oath of Residency Applications	"	1 year**	Paper/Electronic	
5321	Police Reports	"	1 year**	Paper/Electronic	
5322	Prior to Residence Applications	"	1 year**	Paper/Electronic	
	<u>Special Education</u>				
5221	Special Education Tutoring Reports	Exec. Director of Special Education	2 years 10 years	Paper Electronic	
5222	Individual Educational Plan (IEP)/Multifactorial Evaluations (MFE)	Bldg. Principal/ Exec. Director of Special Education	2 years Permanent	Paper Electronic	
5223	Psychological Records (Restricted)	Exec. Director of Special Ed./Nurse	Permanent	Electronic	
	<u>Transportation Department</u>				
5340	Driver Physical	Transportation Supervisor	1 year after termination	Paper	
5341	Fuel Consumption Data	Transportation Supervisor	3 Years**	Paper/Electronic	
5342	Transportation Records	Transportation Supervisor	3 Years**	Paper/Electronic	
5343	Field Trip Forms and Volunteer Driver Forms	Transportation Supervisor	Fiscal year plus 2 years	Paper/Electronic	
5441	Accident Reports	Transportation Supervisor	3 years provided no action pending	Paper/Electronic	
5442	Vehicle Registration	Exec. Director of Business Services	Life of Vehicle	Paper	
5443	Vehicle License	Exec. Director of Business Services	1 year after termination	Paper	
5444	Abstracts	Transportation Supervisor	1 year	Paper	

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5445	Driver Certification Transportation Supervisor	1 year after termination	Paper	
5446	Supplies Inventory Transportation Supervisor	Until superseded**	Paper	
5447	Vehicle Defect Report Transportation Supervisor	Life of Vehicle	Paper/Electronic	
<u>Food Service Department</u>				
5261	Food Service Records Menus Food Production Milk Students Served Food Service Supervisor	1 year 4 years**	Paper Electronic	
5262	Lunchroom Records Cash Register Tapes Cashier's Daily Reports Food Service Supervisor	1 year 4 years**	Paper Electronic	
5263	Lunchroom Reports (Free and Reduced Prices) Food Service Supervisor	1 year 4 years	Paper Electronic	
5461	Lunch Applications/Lists (Free and Reduced Prices) Food Service Supervisor	1 year 4 years	Paper Electronic	
5462	Inventories Food Service Supervisor	Until superseded**	Paper	
5463	Lunchroom License Food Service Supervisor	1 year after expiration	Paper	
6000	FINANCIAL RECORDS			
6101	Annual Financial Reports Treasurer Appropriation Ledgers Budget Ledgers Revenue Journals Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports Financial Summary Detail Reports	2 years 5 years**	Paper Electronic	
6102	Activity Fund Cash Journal and Ledger Treasurer	2 years 5 years**	Paper Electronic	

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6103	Bond Register Treasurer	5 years after issue expires	Electronic	
6104	Securities Treasurer	2 years 5 years	Paper Electronic	
6201	Investment Ledger Treasurer	5 years**	Electronic	
6202	Foundation Distribution Treasurer	5 years**	Electronic	
6203	Tax Settlements (Semi- Annual) and Advances Treasurer	5 years**	Electronic	
6204	Budgets (Annual) Treasurer	5 years**	Electronic	
6205	Insurance Policies Treasurer	5 years after expiration provided all claims settled	Paper Electronic - Once Settled	
6206	Contracts Treasurer	5 years after expiration	Electronic	
6207	Bonds and Coupons Treasurer	Until redeemed**	Paper/Electronic	
6208	Accounts Payable Ledgers Treasurer	5 years**	Paper/Electronic	
6209	Accounts Receivable Ledgers Treasurer	5 years**	Paper/Electronic	
6210	Budget Work Papers Treasurer	2 years**	Paper/Electronic	
6211	Vouchers, Invoices and Purchase Order Treasurer	2 years 7 years**	Paper Electronic	
6212	State Program Files Aux. Services, DPPF Adult Vocational, Excess Lottery, Data Processing, Public/ Private Grants, etc. Treasurer	2 years 7 years**	Paper Electronic	
6213	Federal Program Files Title I, II, III, IV-B, IV-C, VI-B & VI-R; Chapter 1, 2; Drug Free, etc. Treasurer	2 years 7 years**	Paper Electronic	

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6214	Travel Expense Vouchers Treasurer	2 years 7 years**	Paper Electronic	
6215	Tax Anticipation Notes (Records borrowing against future tax collections) Treasurer	2 years 7 years**	Paper Electronic	
6216	State Reimbursement Settlement Sheets Treasurer	2 years 5 years**	Paper Electronic	
6217	Unemployment Claims Treasurer	2 years 5 years**	Paper Electronic	
6218	Employee Bonds, Board Member Bonds Treasurer	2 years 5 years**	Paper Electronic	
6219	Certificate of Estimated Resources Treasurer	2 years 5 years**	Paper Electronic	
6220	Appropriation Resolutions Treasurer	2 years 5 years**	Paper Electronic	
6222	Tax Apportionments, Semi-Annual Treasurer	2 years 5 years**	Paper Electronic	
6301	Cancelled Checks and Bank Statements Treasurer	4 years**	Paper/Electronic	
6302	Publication Notice Treasurer	4 years**	Paper	
6303	Tuition Fees and Payments Treasurer	4 years**	Paper	
6304	School Finance (S.F.) Monthly Statement Treasurer	2 years**	Electronic	
6305	Investment Records (May include individual record of investments, bank confirmation, wire transfers, copy of CD etc.) Treasurer	4 years**	Electronic	
6306	Travel Expense Reports Board and Employees Treasurer	4 years**	Paper	
6307	State Sales Tax Reports Treasurer	4 years**	Paper	
6308	Student Activity Fund (Pay-ins, Pay-outs, Treasurer	2 years 4 years**	Paper Electronic	

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	Receipts/Deposits Cancelled Checks, Reports) Budgets, Purpose, Evaluation			
6309	Check Registers Treasurer	2 years 4 years**	Paper Electronic	
6310	Deposit Slips/Cash Proofs Treasurer	2 years 4 years**	Paper Electronic	
6311	Bids and Specifications (Unsuccessful) Treasurer	2 years 4 years**	Paper Electronic	
6312	Bids and Specifications (Successful) Treasurer	2 years after completion of project**	Paper	
6313	Receipt Books Treasurer	2 years 4 years**	Paper Electronic	
6314	Extra Trip Records Treasurer	2 years 4 years**	Paper Electronic	
6315	Monthly Financial Reports Treasurer	4 years**	Electronic	
6316	Accounting Data Treasurer	2 years 4 years**	Paper Electronic	
6317	Contracts: Service Treasurer	2 years 4 years**	Paper Electronic	
6318	State Subsidy Requests Applications for driver education, pupil transport- ation, special education,etc. Treasurer	3 years**	Paper	
6319	Delivery/Packing Slips Treasurer	1 year**	Paper	
6401	Requisitions Treasurer	1 year**	Paper	
7000	PAYROLL RELATED			
7001	Payroll Ledgers Treasurer Bi-Weekly Payroll Reports Quarterly Payroll Reports	2 years Permanent	Paper Electronic	

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7102	Earnings, Registers (Individual Earnings Report)	Treasurer	2 years	Paper
	By Staff Member By Calendar Year		Permanent	Electronic
7103	Monthly Payroll Reports (Leave usage and accumulation, retirement service, etc.)	Treasurer	2 years	Paper
			Permanent	Electronic
7201	Bureau of Employment Service Quarterly Reports	Treasurer	2 years	Paper
			7 years	Electronic
7301	W-2's, W-4's (Employer Copy)	Treasurer	6 years and current**	Electronic
7302	Federal Income Tax (Quarterly/Annual)	Treasurer	2 years	Paper
			6 years and current**	Electronic
7303	Ohio Income Tax (Monthly/Annual)	Treasurer	2 years	Paper
			6 years and current**	Electronic
7304	City Income Tax (Monthly/Annual)	Treasurer	2 years	Paper
			6 years and current**	Electronic
7305	School Income Tax (Monthly/Annual)	Treasurer	2 years	Paper
			6 years and current**	Electronic
7306	Payroll Reports (All Reports Used for Each Payroll -- Computer Generated -- except those listed under 7001, and 7102- 3 above	Treasurer	2 years	Paper
			4 years**	Electronic
7307	Payroll Update Listing	Treasurer	4 years**	Paper
7308	Payroll Calculations	Treasurer	4 years**	Paper
7309	State Teachers System and School Employees Retirement System Waivers	Treasurer	2 years	Paper
			Permanent	Electronic

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7310	School Employees Retirement System (SERS) Reports Treasurer	4 years**	Paper	
7311	State Teachers Retirement System (STRS) Reports Treasurer	4 years**	Paper	
7312	Annuity Reports Treasurer	4 years**	Paper	
7313	Benefit Folder/Report Treasurer	4 years**	Paper	
7314	Employee Request and/or Authorization (Sick, Vacation, Personal, or Other Leave) Treasurer	4 years**	Electronic	
7315	Deduction Reports Voluntary Employment Payroll Deductions Treasurer	4 years**	Paper	
7316	Employee Vacation/Personal/Sick Leave Records Treasurer	3 years**	Electronic	
7317	Time Sheets Treasurer	4 years**	Paper	
7318	Overtime Authorization Treasurer	4 years	Paper	
7319	Employee Insurance Bills Medical, Dental, Life Treasurer	2 years 4 years**	Paper Electronic	
7323	Paycheck Register (Not Ledgers) Treasurer	2 years 4 years**	Paper Electronic	
7324	Payroll Bank Statement Treasurer	2 years 4 years**	Paper Electronic	
7401	Deduction Authorization Treasurer	Until superseded or employee termination	Paper	
8000	REPORTS			
8201	State Audit Reports Treasurer	5 years	Paper/Electronic	
8204	School Finance (SF) Reports Treasurer	5 years	Electronic	
8205	Special Education (S.E.) Reports - Annual Exec. Director of Special Education	5 years	Electronic	
8206	Vocation Education (V.E.) Reports - Annual Director of Career-Technical Educ.	5 years	Electronic	

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8207	Ohio Common Core Data (O.C.C.D.) Reports Superintendent	5 years	Electronic	
8209	Ohio Dept. of Education (O.D.E.) Reports Bldg. Principal/ Superintendent	5 years	Electronic	
8211	Civil Rights Reports Superintendent	25 years	Electronic	
8212	Title IX Reports Superintendent	10 years	Electronic	
8304	Transportation Reports Transportation Supv.	4 Years**	Electronic	
9000	OTHER			
9101	Personnel Directory Executive Director of Human Resources	10 years	Paper/Electronic	
9102	Enrollment Record (By Grade and Building) Superintendent	2 years Permanent	Paper Electronic	
9202	School Calendars Superintendent	2 years 5 years**	Paper Electronic	
9203	Building, Boiler, Maintenance Reports Exec. Director of Business Services	2 years**	Paper	
9402	Employee Handbooks Superintendent	Until superseded	Paper/Electronic	
9403	Directives, Standards, Laws from Local, State, and Federal Governmental Agencies All Administrators	Until superseded	Paper/Electronic	
9404	Attendance Records Superintendent	Until superseded	Paper/Electronic	
9405	Transient Documents - Includes e-mail, voicemail, telephone messages, text messages, drafts, and other limited documents which serve to convey information of temporary importance in lieu of oral communication All employees	(UNAV) Until no longer of administrative value. No RC-3 required	Paper/Electronic	

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9406	Web Page Material	Continually updated	Electronic	
	EMIS Data			
9501	Personnel Validations and State AGGS	5 years	Paper/Electronic	
9502	Personnel Assignment File Listing	2 years Permanent	Paper Electronic	
9503	Personnel Not Paid Public Local Funds Report	2 years Permanent	Paper Electronic	
9504	Student Validations and State AGGS	5 years	Paper/Electronic	
9505	Student School Masters	5 years	Paper/Electronic	
9506	Student Backup Testing Data	5 years	Paper/Electronic	
9507	Student Program Codes - Individual	10 years	Paper/Electronic	
9508	Student Discipline Detail Reports	5 years	Paper/Electronic	
9509	Student Discipline Summary Reports	10 years	Paper/Electronic	
9511	Internal Data Requests and Public Records Requests	1 year	Paper/Electronic	

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