

Noninstructional Operations 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 of 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 Coordinator, in conjunction with the Superintendent ~~and~~ Board Clerk, ~~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 ~~Administrative Business Office, Directors of Maintenance, and Transportation, Nutrition Services, Technology Coordinator, and the building Principals., at the school's buildings and other administrative personnel employed by the District.~~ However, each school ~~Employees are~~ is likewise responsible for having knowledge of this policy and the requirement to ~~maintain and~~ safeguard the District's records, electronic or otherwise, consistent with the chart below.

~~The District's Public Records Coordinator shall work in conjunction with the Director of District's Technology department to assure that all staff are 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 All 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 Electronic Mail (e-mail)

The District will store ~~electronic mail/e-mails~~ e-mails for a maximum period of 7 years. All e-mail 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 e-mails electronic mail. An employee's

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

Suspending or Destroying 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 Freedom of Information Act (FOIA) 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 Coordinator, Superintendent, and Board Clerk are responsible for carrying out this policy.

If ~~relevant~~ Records existing in ~~an~~ electronic formats (such as e-mail, digital images, word processed documents, databases, backup tapes, etc.) **shall require** the District's Administrative personnel **to** ~~shall~~ notify its information technology staff to cease the destruction of records relating to the subject matter of the ~~litigation~~ suit, potential ~~litigation~~ suit, or ~~an~~ investigation. Failure to cease the destruction of ~~relevant~~ **electronic formatted** records could result in penalties against the District.

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

DISTRICT RECORDS RETENTION SCHEDULE

Retention Codes

| AC After closed, terminated, completed, expired, settled, or last date of contact FE Fiscal Year End (June 30 th) | LA Life of Asset PM Permanent US Until Superseded | DO District Office SB School Buildings DM District Maintenance DT District Transportation |
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| RECORDS DESCRIPTION | RETENTION PERIOD | |
| ADMINISTRATION— ATTENDANCE— annual attendance summaries by building | PM | DO, SB |
| ADMINISTRATION— ATTENDANCE— Enrollment attendance data | 3 yr | DO, SB |
| ADMINISTRATION— BALLOTS AND OATHS OF ELECTION— until canvassed and recorded in the minutes | Not less than 8 months following election | DO |

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| ADMINISTRATION— BALLOTS FOR BOND ELECTIONS | 1. Not less than 60 days after bonds have been delivered to purchaser 2. Not less than 8 months following bond election | DO |
| ADMINISTRATION—CONTRACTS AND LEASES | AC+6-yr | DO |
| ADMINISTRATION—GENERAL | 3-yr | DO, SB |
| AC— After closed, terminated, completed, expired, settled, or last date of contact FE— Fiscal Year End (June 30 th) | LA— Life of Asset PM— Permanent US— Until Superseded | DO— District Office SB— School Buildings DM— District Maintenance DT— District Transportation |
| RECORDS DESCRIPTION CORRESPONDENCE | RETENTION PERIOD | |
| ADMINISTRATION— DONATION/GIFT RECORDS | PM | DO, SB |
| ADMINISTRATION— BOARD MEETINGS AGENDA AND MINUTES: Official minutes and agenda of open meetings | PM | DO |
| ADMINISTRATION— BOARD MEETINGS— CLOSED: Certified agendas or tape recordings of closed meetings | PM—Restricted Access | DO |
| ADMINISTRATION— ORGANIZATION CHARTS: Any documentation that shows program accountability | PM | DO, SB, DM, DT |
| ADMINISTRATION— EDUCATION PROGRAM REVIEW RECORDS | AC+3-yr | DO, SB |
| ADMINISTRATION— OFFICIAL STATE DEPARTMENT REPORTS | PM | DO |
| ADMINISTRATION— SCHOOL CERTIFICATION REPORTS | PM | DO |
| ANNUAL REPORTS | PM | DO |
| APPEAL AND REVIEW RECORDS— Records may include but are not limited to narrative history or description of appeal; minutes and testimony; exhibits; reports and findings of fact; final orders, opinions, conclusions, or decisions; audio | PM | DO |

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| recordings; hearing schedules and lists of participants; and related correspondence and documentation. | | |
| BOARD MEMBER RECORDS— Series documents board activities and serves as a reference source for board members. Records may include but are not limited to correspondence, plans, statements of goals and objectives, minutes, committee reports, budgets, financial statements, reports, and other reference material. Records are often compiled in a notebook for each member. | AC+3-yr NOTE: Some materials may warrant long-term retention. These materials should be reviewed for archival materials. | DO |
| BOARD RECORDS— Series documents the official proceedings of the board meetings. Records may include agendas; minutes; 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. | PM | DO |
| COMPUTER SYSTEMS- BACKUPS— Backups on tape, disk, cd, dvd, etc. CAUTION: Records stored in this format can be | US or 1-year | DO |

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| AC —After closed, terminated, completed, expired, settled, or last date of contact FE —Fiscal Year End (June 30 th) | LA —Life of Asset PM —Permanent US —Until Superseded | DO —District Office SB —School Buildings DM —District Maintenance DT —District Transportation |
| RECORDS DESCRIPTION subpoenaed during litigation. | RETENTION PERIOD | |
| EQUIPMENT- HISTORY FILE— Equipment service agreements; includes maintenance agreements, installation, and repair logs, etc. | LA+3-yr | DO, DM, DT |
| EQUIPMENT MANUALS— Instruction and operating manuals | LA | DO, SB, DM, DT |
| EQUIPMENT WARRANTIES | AC+1-yr | DO, SB, DM, DT |
| FACILITIES OPERATIONS- APPRAISALS— Building or property | 3-yr | DO |

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| FACILITIES OPERATIONS- BUILDINGS PLANS AND SPECIFICATIONS— Includes architectural and engineering drawings, etc. | PM For leased structures retain AG+2 | DO, DM |
| FACILITIES OPERATIONS- BUILDINGS, CONSTRUCTION CONTRACT, INSPECTION RECORDS AND PROJECT FILES— Building construction contracts, surety bonds and inspection records, Planning, design, construction records & all bids, etc. | LA | DO, SB, DM |
| FACILITY OPERATIONS— DAMAGE REPORTS; LOST AND STOLEN PROPERTY REPORTS | FE+3-yr | DO, SB, DM, DT |
| FACILITY OPERATIONS- PROPERTY DISPOSAL RECORDS— Documenting disposal of inventoried property | PM | DO |
| FACILITY OPERATIONS- PROPERTY MANAGEMENT SEQUENTIAL NUMBER LOGS— Property logs | US+3-yr | DO, SB, DM |
| FACILITY OPERATIONS- SECURITY ACCESS RECORDS— Documents the issuance of keys, identification cards, passes, passwords, etc. | AG+2-yr AG=Until superseded, date of expiration or date of termination, whichever is sooner | DO, SB, DM |
| FACILITY OPERATIONS- SURPLUS PROPERTY SALE REPORTS | PM | DO, DM |
| FACILITY OPERATIONS- UTILITY USAGE REPORTS | 1-yr | DO, DM |
| FACILITY OPERATIONS- VEHICLE OPERATION LOGS | 1-yr | DO, DT |
| FISCAL- ACCOUNTS PAYABLE/RECEIVABLE LEDGERS | FE+3-yr | DO, SB |
| FISCAL- ANNUAL FINANCIAL REPORTS | PM | DO, SB, DM, DT |
| FISCAL- ANNUAL OPERATING BUDGETS | FE+3-yr | DO, SB, DM, DT |

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| RECORDS DESCRIPTION | RETENTION PERIOD | |
| FISCAL- APPROPRIATION REQUESTS— Includes any supporting documentation in the appropriation request | FE+3 yr | DO, SB, DM, DT |
| FISCAL- FINAL AUDIT REPORTS | PM | DO, SB |
| FISCAL- BANK STATEMENTS | FE+3 yr | DO, SB |
| FISCAL- CANCELLED CHECKS— Stubs/Warrants/Drafts | FE+3 yr | DO, SB |
| FISCAL- CAPITAL ASSET RECORDS | LA+3 yr | DO, SB, DM, DT |
| FISCAL- CASH RECORDS— Cash deposit slips; cash receipts log | FE+3 yr | DO, SB |
| FISCAL- DEEDS AND EASEMENTS— Proof of ownership and right of way on property | PM | DO |
| FISCAL- DETAIL CHART OF ACCOUNTS— One for all accounts in use for a fiscal year | FE+3 yr | DO, SB |
| FISCAL- EXPENDITURE JOURNAL OR REGISTER | FE+3 yr | DO, SB |
| FISCAL- EXPENDITURE VOUCHERS— Travel, payroll, etc. | FE+3 yr | DO, SB, DM, DT |
| FISCAL- EXTERNAL REPORTS— Special purpose, i.e. federal financial reports, salary reports, etc. | FE+3 yr | DO, SB, DM, DT |
| FISCAL- FEDERAL TAX RECORDS— Includes FICA records | AC+4 yr AC=Tax due date, date the claim is filed, or date tax is paid whichever is later | DO |
| FISCAL- FEDERAL FUNDING RECORDS— Title I; Chapter 2; Title VI-B | FE+5 yr Or until all pending audits or reviews are completed | DO |

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| FISCAL— FEDERAL— USDA | AC+3-yr AC=submission of final expenditure | DO |
| FISCAL— GENERAL LEDGERS; GENERAL JOURNAL VOUCHERS | FE+3-yr | DO, SB |
| FISCAL— GRANTS— State and Federal | AC+3-yr AC=End of grant or satisfaction of all uniform administrative requirements for the grant CAUTION: Retention requirements may vary depending on the specific federal funding agency | DO, SB |

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| RECORDS DESCRIPTION | RETENTION PERIOD | |
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| FISCAL— INSURANCE CLAIM FILES | AC+3-yr AC=Resolution of claim | DO |
| FISCAL— INSURANCE POLICIES— all types | AC+5-yr AC=expiration or termination of policy according to its terms | DO |
| FISCAL— LONG-TERM LIABILITY RECORDS— Bonds, etc | AC+4-yr AC=retirement of debt | DO |
| FISCAL— RECEIPTS JOURNAL OR REGISTER | FE+3-yr | DO, SB, DM, DT |
| FISCAL— RECONCILIATIONS | FE+3-yr | DO, SB |
| FISCAL— REIMBURSABLE ACTIVITIES— Requests & approval for reimbursed expenses for travel, training, etc. | FE+3-yr | DO, SB |
| FISCAL— RETURNED CHECKS— Uncollectable warrants or drafts | AC+3-yr AC=After deemed uncollectible | DO, SB |
| FISCAL— SIGNATURE AUTHORIZATIONS— | US+FE+3-yr | DO |

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| Records authorizing an employee to initiate financial transactions for agency. Also, spending authority limits | | |
| LEGAL— LITIGATION FILES— | PM CAUTION: May contain attorney-client privileged information | DO, SB, DM, DT |
| LEGAL— OPEN RECORDS REQUESTS— documentation relating to approved or denied requests for records under Idaho Public Records Law | PM | DO |
| LEGAL—OPINIONS AND ADVICE— Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation | PM CAUTION: May contain attorney-client privileged information | DO, SB |
| NEWS OR PRESS RELEASES | PM | DO, SB |
| PERSONNEL—ACCUMULATED LEAVE ADJUSTMENT REQUEST— Used to create and adjust employee leave balances | FE+3-yr | DO, SB, DM, DT |
| PERSONNEL—APPLICATIONS FOR EMPLOYMENT—HIRED— Applications, etc. required by employment advertisement | AC+5-yr AC=Termination of employment | DO, SB, DM, DT |
| PERSONNEL—APPLICATIONS FOR EMPLOYMENT—NOT HIRED— Applications, resumes, etc. required by employment advertisement | AC+2-yr AC=Date position is filled | DO, SB, DM, DT |
| PERSONNEL—BENEFIT PLANS | US+1-yr | DO |

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| RECORDS DESCRIPTION | RETENTION PERIOD | |
| PERSONNEL- COMPLAINT RECORDS— Complaints received and records documenting their resolution | FE+3-yr CAUTION: If a complaint becomes the subject of litigation, it is subject to a longer retention period | DO, SB, DM, DT |
| PERSONNEL- CORRECTIVE ACTION— those actions which do not affect pay, status or tenure and are imposed to correct or improve job performance | AC+3-yr AC=Termination of corrective action. CAUTION: If during the retention period these records are used to support personnel disciplinary action, the records should be retained according to Personnel Disciplinary Action series. | DO, SB, DM, DT |
| PERSONNEL- DISCIPLINARY ACTION DOCUMENTATION— those actions that affect pay or status. They include demotion, dismissal, etc. | AC+3-yr AC=termination of employment | DO, SB, DM, DT |
| PERSONNEL- EMPLOYEE STATEMENTS (Affidavits)— for insurance, personnel or other uses for which Administration has sought such statements | AC+3-yr AC=Termination of employment | DO, SB, DM, DT |
| PERSONNEL- EMPLOYEE BENEFITS— Documents relating to selection of benefits other than insurance | US | DO, |
| PERSONNEL- EMPLOYEE COUNSELING RECORDS— Notes, etc. relating to job-specific counseling | AC+3-yr AC=Termination of counseling | DO, SB, DM, DT |

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| PERSONNEL— EMPLOYEE DEDUCTION AUTHORIZATIONS— documents relating to all deductions of Pay | AC+3-yr AC=After termination of employee or after amendment, expiration or termination of authorization; whichever is sooner. | DO |
| PERSONNEL— EMPLOYEE EARNINGS RECORDS | 4-yr | DO |
| PERSONNEL— EMPLOYEE INSURANCE RECORDS— District copy of selection records by employees of insurance offered by the District | US | DO |
| PERSONNEL— EMPLOYEE RECOGNITION RECORDS— Awards, incentives, etc. | AC+3-yr AC=Termination of employment | DO, SB, DM, DT |
| PERSONNEL— EMPLOYMENT ANNOUNCEMENT | 2-yr | DO |
| PERSONNEL— EMPLOYMENT CONTRACTS | Original dates of hire +50-yr | DO |
| PERSONNEL— EMPLOYMENT ELIGIBILITY— Documentation or verification of Federal report form INS-19 | AC+4-yr AC=Termination of employment; with a minimum of 4 years | DO |

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| RECORDS DESCRIPTION | RETENTION PERIOD | |
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| PERSONNEL— EMPLOYMENT SELECTION RECORDS— all records that document the selection process: i.e. polygraph, physicals, interview notes, etc. | 2-yr CAUTION: Does not include criminal history checks | DO, SB, DM, DT |
| PERSONNEL— FORMER EMPLOYEE VERIFICATION RECORDS— minimum information includes name, social security number, exact dates of employment and last known address | Original date of hire +50-yr | DO |

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| PERSONNEL GRIEVANCE RECORDS— review of employee grievances against policies and working conditions, etc. Includes record of actions taken. | AC+6-yr AC=final decision on the grievance | DO, SB, DM, DT |
| PERSONNEL HIRING PROCESS— CRIMINAL HISTORY CHECKS— criminal history record information on job applications | AC+1-yr AC=After hiring decision made | DO |
| PERSONNEL JOB PROCEDURE RECORD/JOB DESCRIPTION— any document detailing duties of positions on position by position basis | US+3-yr | DO, SB, DM, DT |
| PERSONNEL LEAVE STATUS REPORT— cumulative report for each pay cycle showing leave status | FE+3-yr | DO |
| PERSONNEL LIABILITY RELEASE FORM— statements of employees, patrons, etc. who have released the district from liability | PM | DO |
| PERSONNEL LICENSE AND DRIVING RECORD CHECK | US | DO, DT |
| PERSONNEL OVERTIME AUTHORIZATION & SCHEDULE | PM | DO, SB, DM, DT |
| PERSONNEL PAYROLL DIRECT DEPOSIT APPLICATION/AUTHORIZATION | US | DO |
| PERSONNEL PAYROLL INCOME ADJUSTMENT AUTHORIZATION— used to adjust gross pay, FICA, retirement or compute taxes | 3-yr | DO |
| PERSONNEL PERFORMANCE APPRAISAL | PM | DO, SB, DM, DT |
| PERSONNEL PERSI ENROLLMENT FILE | 6-yr from filing date | DO |
| PERSONNEL PERSI RECORD OF HOURS WORKED— Irregular help, half time or greater | Date of hire +50-yr | DO |
| PERSONNEL PERSI TERMINATION RECORD | 6-yr | DO |

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| PERSONNEL— PERSONNEL INFORMATION— documents that officially change pay, titles, benefits, etc. | PM | DO |
| PERSONNEL— POLICY AND PROCEDURES MANUAL— any manual, etc. that establishes standard employment procedures | PM | DO, SB, DM, DT |
| PERSONNEL— RESUME-UNSOLICITED | 1-yr | DO, SB, DM, DT |

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| RECORDS DESCRIPTION | RETENTION PERIOD | |
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| PERSONNEL— SICK LEAVE POOL DOCUMENTATION— requests submitted, approvals, number of hours transferred in an out, etc. | FE+3-yr | DO |
| PERSONNEL— TIME CARD AND TIME SHEET | 3-yr | DO, SB, DM, DT |
| PERSONNEL— TIME OFF AND/OR SICK LEAVE REQUEST | FE+3-yr | DO, SB, DM, DT |
| PERSONNEL— TRAINING AND EDUCATIONAL ACHIEVEMENT RECORD INDIVIDUAL— Records documenting training, testing or continued education | AC+3-yr AC=Termination of employment | DO, SB, DM, DT |
| PERSONNEL— UNEMPLOYMENT CLAIM RECORD | 3-yr | DO |
| PERSONNEL— UNEMPLOYMENT COMPENSATION RECORDS | AC+3-yr | DO |
| PERSONNEL— W-2 & W-4 FORMS | 5-yr from date of termination | DO |
| PERSONNEL— WORKER'S COMPENSATION POLICIES | AC+10-yr AC=expiration of policy | DO |
| PROCUREMENT— PERFORMANCE BOND— Bonds posted by individuals or entities under contract with District | PM | DO |

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| PROCUREMENT— PURCHASING LOG— Log, etc. providing a record of purchase orders issued, orders received, etc. | FE+3-yr | DO, SB, DM, DT |
| PROCUREMENT— BID DOCUMENTATION— includes bid requisition/authorizations, invitation to bid, bid specifications, and evaluations | FE+3-yr CAUTION: If a formal written contract is the result of a bid, etc., the bid and its supporting documentation must be retained for the same period as the contract. | DO, DM, DT |
| RECORDS MANAGEMENT— RECORDS RETENTION SCHEDULE; DISPOSITION LOG (listing records destroyed or transferred); CONTROL MATERIALS (indexes, card files, etc.); DESTRUCTION APPROVAL SIGN-OFFS | PM | DO, SB, DM, DT |
| SAFETY— ACCIDENT REPORTS | 8-yr* For Minors, 8 yrs after minor reaches age of 18 | DO, SB, DM, DT |
| SAFETY— DISASTER PREPAREDNESS AND RECOVERY PLANS | PM | DO, SB, DM, DT |
| SAFETY— EVACUATION PLANS | PM | DO, SB |
| SAFETY— FIRE ORDERS— issued by fire marshal to correct deficiencies in compliance with the fire code | AC+3-yr AC=deficiency corrected | DO, SB, DM |

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FE—Fiscal Year End (June 30th)

LA—Life of Asset
PM—Permanent
US—Until Superseded

DO—District Office
SB—School Buildings
DM—District Maintenance
DT—District Transportation

| RECORDS DESCRIPTION | RETENTION PERIOD | |
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| SAFETY— HAZARDOUS MATERIALS DISPOSAL 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 § | PM | DO, DM |

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| 4910.1200(g): SAFETY- INCIDENT REPORTS— Reports concerning incidents which, upon investigation, were of a non-criminal nature | 3-yr (or 30-yr*) *Exposure records require 30-year retention per 29 CFR § 1910.1020(d)(ii)(B)Footnote(1) | DO, SB, DM, DT |
| SAFETY- INSPECTION RECORDS— Fire, safety, and other inspection records of facilities and equipment | AG+3-yr AG=Date of the correction of the deficiency, if the inspection report reveals a deficiency. | DO, SB, DM |
| SAFETY- MATERIAL DATA SAFETY SHEETS | 30 yrs after the end of use of the substance | DO, DM |
| SAFETY- WORKPLACE CHEMICAL LISTS | 30-yr | DO, SB, DM |
| STUDENTS- EDUCATION RECORDS— Student's name, birth date, last address, dates of attendance, graduation date and grades earned | PM | DO, SB |
| STUDENTS- SPECIAL EDUCATION RECORDS— educational records, including eligibility documentation and IEPs | FE+6-yr | DO, SB |
| STUDENTS- MEDICAID RECORDS- Claims, reimbursements, and supporting documentation | FE +5-yr | DO, SB |
| VEHICLE- INSPECTION, REPAIR AND MAINTENANCE RECORDS | LA+1-yr | DO, DT |
| VEHICLE- TITLE AND REGISTRATION | 1-yr | DO, DT |
| VOLUNTEER RECORDS— records may include recruitment and selection records, volunteer personnel and intern personnel information forms, intern agreements, volunteer and intern time records, emergency notification forms, insurance documentation and correspondence | AG+3-yr AG=End of term of volunteer or intern | DO, SB |
| WEBSITE/WEB PAGES— INTERNET/INTRANET— system development documentation for initial setup; subsequent changes and content of pages | PM | DO, SB |

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| 1. Administration Includes Governance, Elections, Contracts, Correspondence, and Organizational Documentation | Record Description | Retention Period | Location |
| | Agendas, Minutes, Reports, Board Records, Attendance Summary | PM | DO, SB |
| | Ballots (General & Bond) | ≥8 Months / ≥60 Days | DO |
| | Board Member Records, Program Review | AC+3 yrs | DO, SB |
| | Contracts & Leases | AC+6 yrs | DO |
| | Donations, Press Releases, Org Chart | PM | DO, SB, DM, DT |
| | Enrollment & General Admin | 3 yrs | DO, SB |
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| 2. Fiscal Records Includes budgets, audits, ledgers, funding, and financial transactions. | Record Description | Retention Period | Location |
| | AP/AR, Bank Statements, Cancelled Checks, Cash, Chart of Accounts, General Ledger, Reconciliations, Reimbursables, Operating Budgets, Appropriations, Expenditures, External Reports, Receipts, Purchasing, Bid Documentation | FE+3 yrs | DO, SB, DM, DT |
| | USDA, Grants, Returned Checks, Insurance Claims | AC+3 yrs | DO, SB |
| | Insurance Policies | AC+5 yrs | DO |
| | Tax Records, Long-Term Liabilities | AC+4 yrs | DO |
| | Title I Ch.2, Title VI-B | FE+5 yrs | DO |
| | Signature Authorizations | US+FE+3 yrs | DO |
| | Capital Assets | LA+3 yrs | DO, SB, DM, DT |
| | Annual Reports, Retention Schedules, Final Audits, Litigation, Legal Advice, Deeds, Easements, Performance Bonds | PM | DO, SB, DM, DT |
| | Record Description | Retention Period | Location |

3. Personnel Records

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| Includes hiring, employment, benefits, evaluations, and disciplinary actions. | Leave Requests, Adjustments, Status, Sick Leave Pool | FE+3 yrs | DO, SB, DM, DT |
| | Applications (Hired), W2, W4 | AC+5 yrs / 5 yrs | DO, SB, DM, DT |
| | Applications (Not Hired), Criminal History, Deduction Authorizations, Corrective Action, Counseling, Unemployment Compensation, Disciplinary Action, Employee Statements, Recognition, Training, Grievance | AC+1–6 yrs | DO, SB, DM, DT |
| | Benefit Plans, Employee Benefits, Insurance, Direct Deposit, License, Driving Record | US / US+1 yr | DO, DT |
| | Earnings, Income Adjustments, Unemployment Claims, Time Sheets | 3–4 yrs | DO, SB, DM, DT |
| | PERSI Enrollment/Termination | 6 yrs | DO |
| | Procedure Descriptions, Selection Records, Announcements | US+3 yrs / 2 yrs | DO, SB, DM, DT |
| | Contracts, Former Employee Verification | Original Hire Date +50 yrs | DO |
| | Overtime, Performance Appraisals, Policy Manuals, Liability Releases, Personnel Info | PM | DO, SB, DM, DT |
| | Resume (Unsolicited) | 1 yr | DO, SB, DM, DT |
| | Workers' Compensation | AC+10 yrs | DO |
| | Eligibility | AC+4 yrs | DO |
| 4. Student Records Includes general education, special education, and Medicaid documentation. | Record Description | Retention Period | Location |
| | Education | PM | DO SB |
| | Special Education | FE+6yr | DO SB |
| | Medicaid | FE+5yr | DO SB |
| 5. Facilities & Equipment Includes building plans, maintenance, | Record Description | Retention Period | Location |
| | History Files, Manuals | LA (+3 yrs for History Files) | DO, DM, DT |
| | Plans & Specs | A. PM B. AC+2 yrs | DO, DM, DT |

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| warranties, and disposal records. | Appraisals | 3 yrs | DO |
| | Sales, Disposal | PM | DO, DM |
| | Utility Usage | 1 yr | DO, DM |
| | Property Logs | US+3 yrs | DO, SB, DM |
| 6. Safety & Compliance Includes accident reports, inspections, hazardous materials, and emergency plans. | Record Description | Retention Period | Location |
| | Damage, Lost/Stolen Reports, Fire Orders, Access Records | FE+3 yrs / AC+2 yrs | DO, SB, DM, DT |
| | Accidents | 8 yrs | DO, SB, DM, DT |
| | Evacuation Plans, Disaster Preparedness, Hazardous Material Disposal | PM | DO, SB, DM, DT |
| | Chemical Lists, SMDS | 30 yrs | DO, SB, DM |
| | Incidents | 3 yrs (or 30 yrs*) | DO, SB, DM, DT |
| | Inspections | LA | DO, SB, DM |
| | | | |
| 7. Technology & Systems Includes backups, web content, and system documentation. | Record Description | Retention Period | Location |
| | Backups | US or 1yr | DO |
| 8. Transportation & Vehicles Includes vehicle logs, inspections, and title records. | Record Description | Retention Period | Location |
| | Operation Logs, registration | 1yr | DO DT |
| | Inspection, Repair | LA+1yr | DO DT |
| 9. Volunteer Records Includes intern agreements, time logs, and emergency contacts. | Record Description | Retention Period | Location |
| | All Volunteer Records | AC+3yr | DO SB |

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.

Legal References:

[I.C. § 33-508](#) Duties of Clerk

[I.C. § 33-701\(8\)](#) Fiscal Year—Payment and Accounting of Funds

[I.C. § 34-1711](#) Canvass of Returns

[I.C. § 56-209h](#) Administrative Remedies

[Section 74-119 – Idaho State Legislature](#) Agency Guidelines

SDE Idaho Special Education Manual Revised 2009, Chapter 11, Section E

Federal Regulation Idaho Records Management Guide, August, 2013

Policy History:

Adopted on: August 8, 2016

Revised on:(Pending)

DRAFT

Noninstructional Operations Retention of District Records

The Board of Trustees establishes the following guidelines to provide administrative direction pertaining to the retention and/or disposal of District records. This schedule identifies the anticipated physical location of where records may be kept or maintained by the District.

The District's Public Records Coordinator, in conjunction with the Superintendent and Board Clerk, 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 Administrative Office, Directors of Maintenance, Transportation, Nutrition Services, Technology, and the building Principals. Employees are responsible for having knowledge of this policy and the requirement to maintain and safeguard the District's records, electronic or otherwise, consistent with the chart below.

Unless otherwise prohibited by applicable law, all District records may be maintained electronically and/or in hard 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 Electronic Mail (e-mail)

The District will store e-mails for a maximum period of 7 years. All e-mail 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 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 e-mails

Suspending of Destroying Official Records

The District will immediately cease the destruction of all records, including electronic records, for the following reasons:

1. The District receives a Freedom of Information Act (FOIA) request;
2. The District believes an investigation or litigation is imminent; or
3. The District is notified an investigation or litigation has commenced.

The Public Records Coordinator, Superintendent, and Board Clerk are responsible for carrying out this policy.

Records existing in electronic formats (such as e-mail, digital images, word processed documents, databases, backup tapes, etc.) shall require the District's Administrative personnel to notify its information technology staff to cease the destruction of records relating to the subject

matter of litigation, potential litigation, or an investigation. Failure to cease the destruction of electronic formatted 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, settled, or last date of contact FE—Fiscal Year End (June 30th) LA—Life of Asset PM—Permanent | | US—Until Superseded DO – District Office SB – School Buildings DM- District Maintenance DT—District Transportation | |
| 1. Administration | Record Description | Retention Period | Location |
| | Agendas, Attendance Summary, Board Records, Minutes, Reports | PM | DO, SB |
| | Ballots (General & Bond) | ≥8 Months / ≥60 Days | DO |
| | Board Member Records, Program Review | AC+3 yrs | DO, SB |
| | Contracts & Leases | AC+6 yrs | DO |
| | Donations, Organization Chart, Press Releases | PM | DO, SB, DM, DT |
| | Enrollment & General Admin | 3 yrs | DO, SB |
| 2. Fiscal Records | Record Description | Retention Period | Location |
| | AP/AR, Appropriations, Bank Statements, Bid Documentation, Cancelled Checks, Cash, Chart of Accounts, Expenditures, External Reports, General Ledger, Operating Budgets, Purchasing, Receipts, Reconciliations, Reimbursable | FE+3 yrs | DO, SB, DM, DT |
| | Grants, Insurance Claims, Returned Checks, USDA | AC+3 yrs | DO, SB |
| | Insurance Policies | AC+5 yrs | DO |
| | Long-Term Liabilities, Tax Records | AC+4 yrs | DO |
| | Title I Ch.2, Title VI-B | FE+5 yrs | DO |
| | Signature Authorizations | US+FE+3 yrs | DO |
| | Capital Assets | LA+3 yrs | DO, SB, DM, DT |
| | Annual Reports, Deeds, Easements, Final Audits, Legal Advice, Litigation, Performance Bonds, Retention Schedules | PM | DO, SB, DM, DT |

| 3. Personnel Records | Record Description | Retention Period | Location |
|---|--|-------------------------------|----------------|
| | Adjustments, Leave Requests, Sick Leave Pool, Status | FE+3 yrs | DO, SB, DM, DT |
| | Applications (Hired), W2, W4 | AC+5 yrs / 5 yrs | DO, SB, DM, DT |
| | Applications (Not Hired), Corrective Action, Counseling, Criminal History, Deduction Authorizations, Disciplinary Action, Employee Statements, Grievance, Recognition, Training, Unemployment Compensation | AC+1–6 yrs | DO, SB, DM, DT |
| | Benefit Plans, Direct Deposit, Driving Record, Employee Benefits, Insurance, License | US / US+1 yr | DO, DT |
| | Earnings, Income Adjustments, Time Sheets, Unemployment Claims | 3–4 yrs | DO, SB, DM, DT |
| | PERSI Enrollment/Termination | 6 yrs | DO |
| | Announcements, Procedure Descriptions, Selection Records | US+3 yrs / 2 yrs | DO, SB, DM, DT |
| | Contracts, Former Employee Verification | Original Hire Date +50 yrs | DO |
| | Liability Releases, Overtime, Performance Appraisals, Personnel Info, Policy Manuals | PM | DO, SB, DM, DT |
| | Resume (Unsolicited) | 1 yr | DO, SB, DM, DT |
| | Workers' Compensation | AC+10 yrs | DO |
| | Eligibility | AC+4 yrs | DO |
| 4. Student Records | Record Description | Retention Period | Location |
| | Education | PM | DO SB |
| | Special Education | FE+6yr | DO SB |
| | Medicaid | FE+5yr | DO SB |
| 5. Facilities & Equipment disposal records. | Record Description | Retention Period | Location |
| | History Files, Manuals | LA (+3 yrs for History Files) | DO, DM, DT |
| | Plans & Specs | A. PM B. AC+2 yrs | DO, DM, DT |
| | Appraisals | 3 yrs | DO |
| | Disposal, Sales | PM | DO, DM |
| | Utility Usage | 1 yr | DO, DM |
| | Property Logs | US+3 yrs | DO, SB, DM |

| 6. Safety & Compliance. | Record Description | Retention Period | Location |
|---|--|-------------------------|-----------------|
| | Access Records, Damage, Fire Orders, Lost/Stolen Reports | FE+3 yrs / AC+2 yrs | DO, SB, DM, DT |
| | Accidents | 8 yrs | DO, SB, DM, DT |
| | Disaster Preparedness, Evacuation Plans, Hazardous Material Disposal | PM | DO, SB, DM, DT |
| | Chemical Lists, SMDS | 30 yrs | DO, SB, DM |
| | Incidents | 3 yrs (or 30 yrs*) | DO, SB, DM, DT |
| | Inspections | LA | DO, SB, DM |
| 7. Technology & Systems | Record Description | Retention Period | Location |
| | Backups | US or 1yr | DO |
| 8. Transportation & Vehicles | Record Description | Retention Period | Location |
| | Operation Logs, registration | 1yr | DO DT |
| | Inspection, Repair | LA+1yr | DO DT |
| 9. Volunteer Records | Record Description | Retention Period | Location |
| | All Volunteer Records | AC+3yr | DO SB |

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[I.C. § 56-209h](#) Administrative Remedies

[Section 74-119 – Idaho State Legislature](#) Agency Guidelines

[SDE Idaho Special Education Manual Revised 2024](#)

[Federal Regulation Idaho Records Management Guide, August, 2024](#)

Policy History:

Adopted on: August 8, 2016

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