

Administration

Retention of Records

Class 1 - Permanent Records

The original of each record listed below, or one exact copy thereof when the original is required by law to be filed with another agency, is a Class 1 - Permanent record and shall be retained indefinitely, unless microfilmed in accordance with board policy #2400.

A. Annual Reports

1. Official budgets
2. Financial reports of all funds
3. Audits of all funds
4. Average daily attendance, including Period 1 and Period 2 reports
5. Other major annual reports, including:
  - a. those containing information relating to property, activities, financial condition, or transactions
  - b. those declared by board minutes to be permanent

B. Official Actions

1. Employees

- a. all detail records relating to employment, assignment, amounts and dates of service rendered, termination or dismissal of an employee in any position, sick leave record, rate of compensation, salaries or wages paid, deductions or withholdings made and the person or agency to whom such amounts were paid
- b. information of a derogatory nature as defined in Education Code Section 44031 shall be Class 1 - Permanent only after it becomes final. This information becomes final when:
  - (1) the time of filing the grievance has lapsed, or
  - (2) the document has been sustained by the grievance process.

2. Pupils

- a. all records pertaining to any accident or injury involving a minor for which a claim for damages had been filed as required by law, including any policy of liability insurance relating thereto, except that these records cease to be Class 1 - Permanent records one year after the claim has been settled or the statute of limitations has run.

Administration

Retention of Records (continued)

C. Property Records

1. All detail records relating to land, buildings, and equipment. In lieu of such detail records, a complete property ledger may be classified as Class 1 - Permanent, and the detail records may then be classified as Class 3 - Disposable, if the property ledger includes:
  - a. all fixed assets
  - b. an equipment inventory
  - c. for each unit of property:
    - (1) the date of acquisition or augmentation
    - (2) the person or agency from whom acquired
    - (3) an adequate description or identification
    - (4) the amount paid
    - (5) the date of disposal, sale, loss, or otherwise (if applicable)

Class 2 - Optional Records

Any record worthy of further preservation but not classified as Class 1 - Permanent may be classified as Class 2 - Optional and shall then be retained until reclassified as Class 3 - Disposable.

Class 3 - Disposable Records

All records not classified as Class 1 - Permanent or Class 2 - Optional shall be classified as Class 3 - Disposable, including but not limited to detail records relating to:

1. Records Basic to Audit, including those relating to attendance, average daily attendance, or a business or financial transaction (purchase orders, invoices, warrants, ledger sheets, cancelled checks and stubs, student body and cafeteria fund records, etc.) and detail records used in the preparation of any other report. Teachers' registers may be classified as Class 3 - Disposable only if all information required in Section 432 is retained in other records or if the General Records pages are removed from the register and are classified as Class 1 - Permanent.
2. Periodic Reports, including daily, weekly and monthly reports, bulletins and instructions.

Administration

Retention of Records (continued)

Retention Period

A Class 3 - Disposable record shall not be destroyed until after the third July 1 succeeding the completion of the audit required by Education Code Section 41020 or of any other legally required audit, or after the ending date of any retention period required by any agency other than the State of California, whichever date is later.

A continuing record shall not be destroyed until the fourth year after it has been classified as Class 3 - Disposable.

Unless otherwise specified in this policy, all Class 3 - Disposable records shall be destroyed during the third year after the school year in which they originated (e.g., 1982-83 plus 3 years equals 1985-86).

Legal Reference: Administrative Code  
432 Varieties of Pupil Records  
16020 et seq. Destruction of Records of School District  
  
Education Code  
41020 Requirement for Annual Audit  
44031 Personnel File Contents and Inspection

Policy

First reading 12-20-83  
Adopted 1-17-84