

Business Record Retention

The district will follow state and federal guidelines in the retention of financial, personnel, and school documents and as required by law. These records will be maintained at the SAU office.

Type	State Retention	Federal Retention
Accident Reports - Employee	6 years or term of employment	
Annual Audit	Permanent	
Annual Report (District)	Permanent	
Application for Federal Grants		5 years
Architectural Plans Engineering Surveys Asbestos Removal	Permanent	
Bank Deposit Slips	Until Audit	
Bond Issue Material	Permanent	
Child Labor Permits	1 year	
Contracts	1 year	
Contract: Certified Educator	Permanent	
Collective Bargaining Agreements	Permanent	
Correspondence for Business	4 years	
Deeds	Permanent	
District Meeting Minutes & Warrants	Permanent	
Enrollment Reports Resident Pupil Membership Form Fall Reports A-12-A Pupil Registers School Opening Reports Statistical Report A-3	14 years Permanent Permanent 3 years Permanent	

Business Record Retention (cont'd.)

Federal Projects Documents		5 years after submission of final audit report and documentation for expenditures, unless there is an ongoing audit
FICA reports - monthly	6 years	
Attendance Records Leaves Request for leaves	1 year 1 year	
Class Observation Forms	1 year	
Criminal Record Check	Term of Employment	
Civil Rights Forms	6 year	
Dues Authorization	Term of Employment	
Application, including Criminal records	Term of Employment	
Evaluations	Term of Employment	
HIPAA Documentation	6 year	
Medical Benefits	Term of Employment	
Re-employment Letter of Assurance	1 year	
Retirement application	Term of Employment	
Separation from Employment Letter/Form	6 year	
Staff Development Plan	Term of Employment	
Child Abuse Reports/Allegations	Permanent	
Criminal Investigation	Permanent	
Criminal Records Check Unsuccessful/Unfavorable	1 year	

Business Record Retention (cont'd.)

Personnel Investigations	Permanent	
Sexual Harassment	Permanent	
Quarterly Forms 941	6 year	
Fixed Trip Requests/Confirmation	1 year	
Fixed Assets Schedule	Permanent as updated	
Form C-2 Unemployment Wage Report (DES 100)	6 year	
Invoices	Until Audit	
MS-22 Budget Form	6 year	
MS-23 Budget Form	6 year	
MS-25 Budget Form	6 year	
Minutes of Board Meeting	Permanent	
Purchase Order	Until Audit	
Request for Payment Vouchers	Until Audit	
Requisitions	1 year	
Retirement Reports - Monthly	1 year	
Student Activity Records/Accts	Until Audit	
Time Cards Custodial Secretarial Substitute Teacher	5 years 5 years 5 years	
Travel Reimbursements	Until Audit	
Treasurer's Receipts Cancelled Checks	6 years	
Treasurer's Report	6 years	

Business Record Retention (cont'd.)

Vocational Education AVI Form Vocational Center Regional Contracts Federal Vocational Forms	1 year 20 years	6 years
Voucher Manifests	Until Audit	
W-2 Yearly		6 years
W-4 Withholding Exemption Certificate		6 years
W-9		6 years
941-E Quarterly Taxes		6 years

To PRC: 05/03/16

Approved: 09/06/16