



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

SCH. #	RECORD SERIES AND DESCRIPTION	RETENTION PERIOD	MEDIA TYPE	YEARS ELIGIBLE FOR DISPOSAL	SC View Storage Location Available
100	Board and Administrative Records				
102	Audio tapes/DVD's of Minutes – Recording of Board meetings	2 years	Audio Tape	FY2019 and prior	n/a
103	Board Meeting Notes – Notes taken during Open Board Meetings used to formulate the minutes	1 year	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 103 - Board Meeting Notes
104	Agendas – Written outlines of material to be discussed at the Board of Education meetings	1 calendar year provided audited	Electronic/paper until scanned then electronic	CY2020 and prior	Records - Board and Admin > 104 - Board Meeting Notes
105	Board Meeting Packets – Packets prepared for board members. May include agendas, copies of reports and informational handouts.	Retain until minutes transcribed and approved	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 105 - Board Meeting Packets
106	Administrative Council Notes: Notes from Administrative Council meetings held prior to Board Meeting to review Board agenda and current activity in the District	1 calendar year	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 106 - Admin Council Notes
109	Board Policy Books and Other Adopted Policies – Governing rules adopted and maintained by Board of Education defining expectations or position on a particular matter and authorizing appropriate action to be taken to establish and maintain those expectations	1 year after superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 109 - Board Policy Books and Other Adopted Policies
110	Administrative Regulations – Adoption of the school policy manual which outlines, and describes the means by which a policy should be implemented providing for the management of planning, action, and assessment or evaluation	1 year after superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 110 - Administrative Regulations
113	Administration of Federal and Stated Categorical Grant Programs - Records relating to the administration of federal and state categorical grant-funded programs. Records may include, but are not limited to: District or school-wide notification/information distributed to parents/legal guardians/students about education opportunities and services; student information (names/eligibility lists, copies of test scores, etc.; staff information (copies of employment applications, payroll/stubs, etc.; budget, inventory of equipment, legal reports, pre-and post-test data, comparability reports, evaluations; promotion of parent/family involvement (Title 1 parent advisory councils, coordination with other school-based programs and services, etc.)	Retain until completion of State Auditor's examination report or retain for period required by grant or program, whichever is later, then destroy	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 113 - Admin of Federal and State Grant Programs
115	Grievance Files/Settlements/Arbitration -Documentation of settlements and arbitration, grievances filed by local collective bargaining groups	10 years	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Board and Admin > 115 -Grievance Files/Settlements/Arbitration
117	Monthly Administrative Reports & Supporting Documentation – Reports submitted monthly by administrators and supervisors on current activity in District associated with Board Agenda	1 calendar year	Electronic/paper until scanned then electronic	CY2020 and prior	Records - Board and Admin > 117 - Monthly Admin Reports & Supporting Docs
118	Elections – Items put on the ballot (tax levy related) regarding the financial support of the District	10 years	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Board and Admin > 118 - Elections
119	Records Retention and Disposition Forms – Records, also called RC-1, RC-2, and RC-3 forms, and other locally developed forms documenting the retention and disposition of the records of an office	Permanent	Electronic/paper until scanned then electronic permanent	FY2020 and prior as long as electronic record on file	Records - Board and Admin > 119 - Record Retention and Disposition Forms
120	Bargaining Agreements – Record of Agreements between the board and recognized local associations of certified and classified staff with regard to wages, hours and other terms of employment including notes taken during the negotiation process	8 years after superseded	Electronic/paper until scanned then electronic	FY2013 and prior	Records - Board and Admin > 120 - Bargaining Agreements
121	Budget Policy Files – annual budget (tax and appropriation) preparation and documentation	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Board and Admin > 121 - Budget Policy Files
122	Workers Compensation Claims – Claims filed by employees due to on the job injury	10 years after financial payment made	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Board and Admin > 122 - Workers Comp Claims
123	Bank Depository Agreements – An agreement between a bank and the district where the bank provides a guaranteed rate of return in exchange for keeping a deposit for a fixed amount of time	4 years after completion	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Board and Admin > 123 - Bank Depository Agreements
124	Organization Reports	2 years provided audited	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Board and Admin > 124 - Organization Reports
125	Adopted Courses of Study – A comprehensive instructional program serving the educational needs of the students of the District	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 125 - Adopted Courses of Study
126	Adopted Special Education Program – A record of programs provided to children with disabilities identified in accordance with applicable State and Federal laws, rules and regulations. These programs satisfy the requirements of Ohio Educational Agencies Serving Children with Disabilities (Ohio's Operating Standards")	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 126 - Adopted Special Ed Program
127	Adopted Special Programs – Record of programs made available to the students to enhance their education through a variety of appropriate co-curricular and extra-curricular activities	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 127 - Adopted Special Programs



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

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128	Photo/Media Release - External Usage - Records documenting permission for non-school entities (such as television/radio stations, newspapers, school photographers, etc.) to use student images. Student images include, but are not limited to, photos, video and audio recordings.	Retain for six years after end of school year	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Board and Admin > 128 - Photo/Media Release - External
129	Photo/Media Release - Denial of permission. Records documenting parent/legal guardian denial of permission for the school/district to use student images recorded during official school activities/events. Includes opting-out.	Retain until end of school year or until superseded, whichever is later, then destroy.	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 129 - Photo/Media Release - Denial of permission
130	Photo/Media Release - School District Usage - Records documenting permission for the school/district to use student images recorded during official school activities/events, by staff or students in an official capacity (e.g. school newspaper, annual staff, etc.) Includes annual student identification/class pictures taken by school-contracted photographer. Student images include, but are not limited to, photos, video, and audio recordings.	Retain for six years after image/recording no longer being used, then destroy.	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Board and Admin > 130 - Photo/Media Release - School District Usage
131	Public Record Requests – Requests for records & documentation that requests were fulfilled	2 years	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Board and Admin > 131 - Public Records Request
132	Organizational Memberships	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 132 - Organizational Memberships
133	Visitor Log	One school year	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Board and Admin > 133 - Visitor Log
200	Employee Records				
201	Personnel Files (Short-Term Retention)- Documentation of the history and status of the employment relationship with an individual employee (classified, certified, active, and inactive). Includes substitute teachers, coaches, and advisors. Records may include: employment applications, performance evaluations, grievances, employment verifications, accident report(s), payroll change sheets, PERS information, exit interview, disciplinary action(s), waiver(s).	Purge and destroy 7 years after employment termination	Electronic/paper until scanned then electronic	FY2014 and prior	Employee Files
203	Employee Discipline Records – Records of a series of disciplinary actions leading to improvement of performance or termination from employment	7 years after termination of employment or case closed, whichever is later, or in accordance with collective contract	Electronic/paper until scanned then electronic	FY2014 and prior	Employee Files
204	Comp Time Cards – Accumulated and used comp time cards	Current fiscal year	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Employee > 204 - Comp Time Cards
205	Drug Test Records – Includes random pool eligibility lists of employees eligible to have random drug screen and drug screening results	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Employee > 205 - Drug Test Records
206	Teacher Lesson Plan Books	End of current school year or until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Employee > 206 - Teacher Lesson Plan Books
207	Employee Contracts – Written agreement between the District and the employee	4 years after termination	Electronic/paper until scanned then electronic	FY2017 and prior	Employee Files
208	Professional Conference Applications – Professional leave forms requesting permission to attend professional development activity	2 years provided audited	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Employee > 208 - Professional Conference Applications
209	Irregular Employee Contracts – Written agreement between the District and substitutes and other irregular employees benefits	4 years after contract expires	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Employee > 209 - Irregular Employee Contracts
210	Unemployment Claims – Invoice maintained by Human Resources for the payment of unemployment claims approved or denied	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Employee > 210 - Unemployment Claims
211	Unemployment Records – Documentation of unemployment records	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Employee > 211 - Unemployment Records
212	Applications (not hired) – Applications submitted of individuals not hired into the District	2 years provided audited	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Employee > 212 - Applications (not hired)
213	Schedules of Employees	Fiscal year plus 2 years	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Employee > 213 Schedules of Employees
214	Teacher Personnel Reports (internal)	Fiscal year plus 1 year	Electronic/paper until scanned then electronic	FY2019 and prior	Employee Files
215	I-9 Immigration Form – Form I-9 "Employment and Eligibility Verification" for all newly hired employees to verify their identity and authorization to work in the United States. Per Department of Homeland Security regulation 8 CFR 274a.2.	3 years after date of hire or 1 year after termination, whichever is later	Electronic/paper until scanned then electronic	FY2018 and prior	Employee Files
216	Job Descriptions – Description of expectations and responsibilities of each job	Retain until superseded or obsolete	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Employee > 216 - Job Descriptions
217	Job Postings – Records documenting the posting and advertisement of employment positions, including, but not limited to, job descriptions, job requirements, application deadline, personnel requisition and compensation range.	2 years	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Employee > 217 - Job Postings
218	LPDC (Local Professional Development Committee) Licensure Records and Staff Summary Reports	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Employee > 218 - LPDC Licensure Records



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

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219	LPDC (Local Professional Development Committee) Meeting Minutes	10 years	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Employee > 219 - LPDC Meeting Minutes
220	Staff Acceptable Use Policy – A Form signed by staff agreeing to use the District network responsibly for District related work	6 years	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Employee > 220 - Staff Acceptable Use Policy
221	Staff Profile – Listing including current position, licensure, degree, retirement credit, and contract information	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Employee > 221 - Staff Profile
222	Annual Training Documentation – Record of trainings includes curricula, test results, materials presented, evaluations, tests administered; certification/hours/credits/ points awarded; sign-in sheets, and attendee lists	3 years plus current year provided audited	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Employee > 222 - Annual Training Documentation
223	Teachers Certificates and Temporary Professional Education Permits	6 years after end of fiscal year, then destroy	Electronic/paper until scanned then electronic	FY2015 and prior	Employee Files
224	Employee Handbooks – Handbooks that each employee receives upon being hired	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Employee > 224 - Employee Handbooks
225	Physician's Report of Work Ability – Physicians report of ability/restrictions for injured employees	7 years	Electronic/paper until scanned then electronic	FY2014 and prior	Records - Employee > 225 - Physician's Report of Work Ability
300	Student Records				
	Student Records- (Short-Term)				
306	Registration/Withdrawal Information – Record of each time a student registers or withdraws within the District	6 years after graduation, withdrawal, or transfer	Electronic/paper until scanned then electronic	FY2015 and prior	Student Files
307	Activity Record – A list of activities students participated in during their high school years	6 years after graduation, withdrawal, or transfer	Electronic/paper until scanned then electronic	FY2015 and prior	Student Files
308	Student Worker Applications	6 years after graduation, withdrawal, or transfer	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Student > 308 - Student Worker Applications
309	Discipline Records – Record of discipline that a student has received including Saturday school, suspensions, and expulsions. Record includes notices to parents.	6 years after graduation, withdrawal, or transfer	Electronic/paper until scanned then electronic	FY2015 and prior	Student Files
310	Intervention Records – Intervention Assistance Team notes listing all of the interventions that were tried with a student to help improve academic achievement which may or may not lead to a referral for special education testing. Includes functional behavioral assessments and behavior intervention plans	6 years after graduation, withdrawal, or transfer	Electronic/paper until scanned then electronic	FY2015 and prior	Special Education
311	Bullying/Harassment Forms – Documentation of bullying/harassment incidents within the District, along with action taken	6 years after graduation, withdrawal, or transfer	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Student > 311 - Bullying/Harassment Forms
312	Gifted and Talented Student Records – Student folders including but not limited to application or offer for participation, testing or eligibility determination records, progress reports, product assessment, samples of student's works, notes, and correspondence.	6 years after graduation, withdrawal, or transfer	Electronic/paper until scanned then electronic	FY2015 and prior	Student Records
313	Attendance/Absence Records – Record of student attendance/absence including daily office call sheets, sign-in sheets, and doctor & parent's notes	1 year	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
314	Cumulative Photo Records	1 year after graduation	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
315	Curriculum Requests/Waivers/Substitutions - Records relating to student requests for classes or waivers/substitutions, where authorizing signature/initials from school district staff is required (principal, teacher, counselor, etc.).	1 year after graduation	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
316	Parent/Legal Guardian Permission Slips for Internet Access and Film Viewing	Retain until end of school year, then destroy	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Student > 316 - Parent/Legal Guardian Permission Slips
317	Student Acceptable Use Policy – A form signed by parents permitting student online access, student information to be used in the media as well as parent/teacher email communication	6 years	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Student > 317 - Student Acceptable Use Policy
318	Statement of Requirements and Expectations Signed and Returned by Parent/Legal Guardian	Retain until end of school year, then destroy.	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Student > 318 - Statement of Requirements and Expectations
319	Student Schedules/Contact Information	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
320	Interim Grade Reports – Mid-term status report of student performance with teacher comments not part of permanent record	End of current school year	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
321	Student Organization Activity Records – Purpose clauses/budgets of student clubs engaging in financial activities	2 years after end of fiscal year	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Student > 321 - Student Organization Activity Records
322	Adult Basic Literacy Education/General Education Development. (ABLE/GED) Records – Includes student registration forms, release of information form, student progress forms, and standardized assessment answer sheets.	1 year	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Student > 322 - Adult Basic Literacy Education/General Education Development. Records



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

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323	Custody Court Documents – Verification of court established guardianship/custody	Until superseded or student reaches 18 years of age	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
324	Notice of Placement Termination – A notice of termination of placement relinquishing care and control, noticed received from the County Juvenile Court	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Student Records
325	Child Abuse/Neglect Referral Letters – Records related to suspected child abuse as reported to Child Protective Services or to the proper law enforcement agency - includes reports, confirmation of submission, correspondence, inquiries, records documenting revisions/corrections, etc.	Through graduation	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
326	Teacher Grade Books/Records	3 years provided audited	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Student > 326 - Teacher Grade Books
327	Pre-School Screening Profile – ASQ/SE, GGG assessment record. A screening profile used for pre-school students	3 years	Electronic/paper until scanned then electronic	FY2018 and prior	Student Records
328	Open Enrollment Forms - Registration of student living outside the District enrolling into the school District	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Student Records
329	Transfer Records – Records of students transferring from one school to another (granted/not granted)	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Student Records
330	Emergency Information – A form containing student emergency contact information	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Student Records
331	Health/Medical Records – Student visual and hearing screening and immunization records. Also includes record of health screenings such as audio/visual, physical therapy, speech-language pathology, and physician instructions	10 years after last contact	Electronic/paper until scanned then electronic	FY2011 and prior	Student Records
332	Health Logs – Record of health care services provided to students such as medication and first aid.	2 years	Electronic/paper until scanned then electronic	FY2019 and prior	Student Records
333	Free/Reduced Price Lunch Application – Confidential applications for free and reduced lunch benefits	4 years	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Student > 333 Free/Reduced Price Lunch Application
Special Needs Records In accordance with OAC 3301-51-04 and 34 CFR 300.624, parents should be informed when personally identifiable information collected, maintained or used under OAC 3301-51-04 is no longer needed to provide educational services to the child. This information must also be destroyed at the request of the parent with the exception of information described in item 301. These records may be needed beyond the retention period in connection with applications for social security or other benefits. However, unnecessarily long retention may jeopardize personal privacy.					
334	Special Education Tutoring Reports – These files document tutoring provided to students through special programs. They include authorization forms signed by parents allowing their child to participate in the program.	Retain 6 years after student graduates or would have normally graduated.	Electronic/paper until scanned then electronic	FY2015 and prior	Special Education
335	Psychological Records (Restricted) – Records that document all students who are provided counseling, psychological services by the school's counseling center. Clinicians provide treatment concerning personal problems, academic concerns, and career concerns. Records may include extensive notes made by providers concerning the assessment, diagnosis, treatment and contacts (written, telephone, or in person) with each student; referral letters; release of medical records; letters to agencies or others concerning the students; and other related material	Retain 10 years after last contact. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1)	Electronic/paper until scanned then electronic	FY2011 and prior	Special Education
336	Evaluation Team Report (ETR) – A report that is developed after a series of assessments given by the school psychologist and others to determine whether or not the student has a disability	Retain 6 years after student graduates or would have normally graduated. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1)	Electronic/paper until scanned then electronic	FY2015 and prior	Special Education
337	Individual Education Plan (IEP) – A legal binding document that lists goals/objectives and related services that the student will receive throughout the calendar year based on the assessment results of the ETR (Evaluation Team Report)	Retain 6 years after student graduates or would have normally graduated. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1)	Electronic/paper until scanned then electronic	FY2015 and prior	Special Education
338	504/ADA Plan – Plan that allows various accommodations for a student with a general disability	Retain 6 years after student graduates or would have normally graduated. Inform parent or adult student before destruction pursuant to OAC-3301-51-04 (O) (1)	Electronic/paper until scanned then electronic	FY2015 and prior	Special Education



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

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339	Home Instruction (HI) – Records that identify students that are on home instruction due to medical or severe behavioral needs. These records include lesson plans, progress reports, grades and time sheets of the tutor that worked with the student	Retain for 6 years after student graduates or withdraws from district, then destroy.	Electronic/paper until scanned then electronic	FY2015 and prior	Special Education
340	Transfer of Home-Based Student to School/District - Records relating to the transfer of home-based student to school/district, including placement/ evaluation test results, notice of transfer, etc.	Retain for 3 years after student graduates or withdraws from district, then destroy.	Electronic/paper until scanned then electronic	FY2018 and prior	Special Education
341	Special Needs Records (Student not Eligible) - Referrals, evaluations, evaluation reports, and notices for students determined not to be eligible for the special education program	Retain for 5 years after student determined to be ineligible then destroy.	Electronic/paper until scanned then electronic	FY2016 and prior	Special Education
400	BUILDING RECORDS				
401	Building Account Reports – Report of maintenance and custodial services accounts	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Building > 401 - Building Account Reports
402	E-Rate Funding Application – Federal Telecommunications funding applications	6 years	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Building > 402 - E-Rate Funding Application
403	Multi-Site Monitor Review Forms – A checklist to ensure that the site is properly following the CACFP guidelines.	3 years plus current year provided audited	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Building > 403 - Multi Site Monitor Review Forms
404	School Safety Plans – Records related to ensuring student and staff safety at school, including harassment and bullying prevention plans	Retain 6 years after obsolete or superseded, then destroy	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Building > 404 - School Safety Plans
405	Records of Drills or Rapid Dismissals and School Safety Drills – Records of all tornado, fire, rapid dismissal, and school safety drills performed within a building. Records should include the identity of the person conducting the drill, date and time, notification method, staff members on duty and participating, number of occupants evacuated, special conditions simulated, problems encountered, health conditions, and time required to accomplish complete evacuation. Records for school safety drills must contain the date and time of each drill conducted the prior school year and when they will be conducted in the current school year. See ORC 3737.73.	1 year after end of fiscal year	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Building > 405 - Records of Drills or Rapid Dismissals
406	Fire Inspection – Reports of building inspection performed by the city Fire Division	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Building > 406 - Fire Inspection
407	Building Inspection Reports – Elevator, sprinkler, and alarm system reports	2 years	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Building > 407 - Building Inspection Reports
408	Building Health Inspections – A record of all health inspections performed within a building	2 years after end of fiscal year	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Building > 408 - Building Health Inspections
409	Student Activity Records – Pay in forms, pay-out forms; account forms/Dist.; budget forms, requisitions; purchase order; ticket sales reports	2 years	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Building > 409 - Student Activity Records
410	Receipt and Deposit Slips – copies of receipts for monies turned into the office	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Building > 410 - Receipts and Deposit Slips
411	Budget and Appropriation Records – Record of building budget	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Building > 411 - Budget and Appropriation Records
412	Requisitions and Purchase Orders – Record of money being requested and a record of items purchased from the building budget	2 years	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Building > 412 - Requisitions and Purchase Orders
413	Inventories – Inventory of supplies, textbooks, and other materials purchased and used with the building	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Building > 413 - Inventories
414	Student Handbook – Handbook containing student policies, regulations and codes	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Building > 414 - Student Handbook
415	Building Security/Surveillance videos	Use for one cycle then reuse provided no action pending	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Building > 415 - Building Security
500	Central Department Records				
	Administrative Offices				
501	School Calendars – Calendar for in session/out of session school days as well as professional days for teachers	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Central Dept > Admin Offices > 501 - School Calendars >
502	Personnel Directory – Names, phone numbers and addresses of all employees	10 years	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Central Dept > Admin Offices > 502 - Personnel Directory
504	Repair, Installation and Maintenance Records – A record of maintenance, installation and repairs performed on buildings within the District	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Admin Offices > 504 - Repair, Installation and Maintenance Records
505	Building/Facilities and Equipment Inventory – Inventory of equipment owned by District	Until superseded provided audited	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Admin Offices > 505 - Building/Facilities and Equipment Inventory
506	Building, Boiler & Maintenance Reports – Inspection/ maintenance reports for each building including boiler inspection/ maintenance	Until superseded provided audited	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Admin Offices > 506 - Building, Boiler & Maintenance Reports
507	Prevailing Wage Records - Report of hourly wages, benefits and overtime, established by regulatory agencies for each trade and occupation employed in the performance of public work	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Admin Offices > 507 - Prevailing Wage Records



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

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508	Rental Information – Records regarding facilities usage: building permits submitted to use facilities by school or community individuals, athletic teams or groups	2 years provided audited	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Central Dept > Admin Offices > 508 - Rental Information
509	Work Orders – A report of all requested maintenance/custodial work	4 years provided audited	Electronic/paper until scanned then electronic	FY 2017 and prior	Records - Central Dept > Admin Offices > 509 - Work Orders
510	Environmental Reports and Data – Reports on asbestos and other environmental issues	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Admin Offices > 510 - Environmental Reports and Data
511	Vandalism Reports – Reports of vandalism throughout the District	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Admin Offices > 511 - Vandalism Reports
512	Student Activity Purpose Clauses	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Admin Offices > 512 - Student Activity Purpose Clauses
513	Sales Potential Form (Student Activities)	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Receipts/Refunds
514	Sales Potential Forms – Fundraising permission form including the financial summary of the fundraiser upon completion of the event	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Receipts/Refunds
515	Bids and Specifications (Unsuccessful) - Documentation of bids supplied by vendors for any project requesting bids in compliance with ORC	1 year provided audited	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Admin Offices > 515 - Bids and Specifications (Unsuccessful)
516	Bids and Specifications (Successful) - Documentation of bids supplied by vendors awarded any project requesting bids in compliance with ORC	4 years after completion of project	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Admin Offices > 516 - Bids and Specifications (Successful)
517	Contractor Files – Contractor resolutions, additions drawings, etc.	5 years after completion of project provided audited and no action pending	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Central Dept > Admin Offices > 517 - Contractor Files
Transportation Department					
518	Driver Physical – A report of the annual physical performed on drivers	6 years (See OAC 3301-83-07-E-7)	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Central Dept > Transportation Dept > 518 - Driver Physical
519	Daily Bus Schedules – may show bus route, time trip began and ended, number of pupils carried, and drivers signature	Retain for 6 years after end of school year, then destroy	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Central Dept > Transportation Dept > 519 - Daily Bus Schedules
520	Fuel Consumption Data – Fuel records for the buses	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Transportation Dept > 520 - Fuel Consumption Data
521	Transportation Records – Transportation requests received from schools that include student and busing information	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Transportation Dept > 521 - Transportation Records
522	Field Trip Forms/Volunteer Driver Forms – Forms from building requesting busing for field trips	Fiscal year plus 2 years	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Central Dept > Transportation Dept > 522 - Field Trip Forms/Volunteer Driver Forms
523	Preventive Maintenance Reports – A report of work performed to maintain equipment	Fiscal years plus 2 years	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Central Dept > Transportation Dept > 523 - Preventative Maint Records
524	Warranty/Guarantee – Warranty of equipment	Life of equipment	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 524 - Warranty/Guarantee
525	Plant and Equipment Inventory	Until superseded provided audited	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 525 - Plant and Equipment Inventory
526	Vendor Data: W-9 & 1099 documents maintained as long as active vendor then retention period is applied.	6 years & current provided audited	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Central Dept > Transportation Dept > 526 - Vendor Data: W9 & 1099
527	Accident Reports – Law enforcement reports regarding bus accidents	3 years provided no action pending	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Central Dept > Transportation Dept > 527 - Accident Reports
528	Vehicle Registration – Certificates of title and registration paperwork from the BMV for cars, vans, trucks, and buses.	Life of vehicle	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 528 - Vehicle Registration
529	Vehicle License – BMV licensing documentation of motor vehicles	1 year after termination	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 529 - Vehicle License
530	Vehicle Records – Vehicle insurance, finance paperwork	As long as vehicle is owned by District	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 530 - Vehicle Records
531	Driver Certification – Bus driver certification form	1 year after termination	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 531 - Driver Certification
532	Supplies Inventory – Shop/mechanic inventory	Until superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 532 - Supplies Inventory
533	Vehicle Defect Report – Record of defects on each bus	Life of vehicle	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 533 - Vehicle Defect Report
534	Bus on Board Security & Surveillance videos	Use for one recording cycle then reuse provided no action pending	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 534 - Bus on Board Security
535	Improper Student Conduct on School Buses – Records documenting instances of improper student conduct on school buses including bus route, time of incident, nature of incident, and students name	Retain for 1 year after incident, then destroy	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 535 - Improper Student Conduct on School Buses
536	Application for Special Transportation - Application for students with physical disabilities/medical problems	Retain for 4 years after end of fiscal year or until completion of State Auditor's examination report, whichever is sooner	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Transportation Dept > 536 - Application for Special Transportation
537	Bus Condition Checklist - Daily evaluation of bus by drivers	Retain for 1 year after end of school year	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Transportation Dept > 537 - Bus Condition Checklist
Food Services Department					



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

SCH. #	RECORD SERIES AND DESCRIPTION	RETENTION PERIOD	MEDIA TYPE	YEARS ELIGIBLE FOR DISPOSAL	SC View Storage Location Available
538	Food Service Records – Financial information, breakfast cost sheets, milk sold, menus, students served	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Food Services Dept > 538 - Food Service Records
539	Lunchroom Records – Cashier's daily production sheets from each building, cash register tapes	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Food Services Dept > 539 - Lunchroom Records
540	Lunchroom Reports – Confidential applications for free and reduced lunch benefits	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Food Services Dept > 540 - Lunchroom Reports
541	Inventories – Inventory of food supplies	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Central Dept > Food Services Dept > 541 - Inventories
542	Lunchroom/ Food Service License – Current food service license, issued annually by the board of health of the health district in which the food service operation is located.	1 year after expiration	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept > Food Services Dept > 542 - Lunchroom/ Food Service License
543	Vendor Food Service Contract – Contract between the District and an outside vendor providing meals and snacks	3 years plus current year provided audited	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Central Dept > Food Services Dept > 543 - Vendor Food Service Contract
544	Schedule for School Breakfast/Lunch Programs – Includes plan and backup documentation submitted to Ohio Board of Education for program approval	Retain for 6 years after plan obsolete or superseded, then destroy	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Central Dept > Food Services Dept > 544 - Schedule for School Breakfast/Lunch Programs
Financial Records					
601	Audit Reports – Past management evaluation reports, monthly claim documentation, master lists, and income eligibility applications	3 years plus current year provided audited	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Financial > 601 - Audit Reports
602	Annual Financial Reports – Financial reports prepared from the accounting system that can be reproduced from the computer records. This includes: Annual Ledgers, Budget Ledgers, Vendor Listing, Check Register, Invoice List, Purchase Order Listing, Accounts Reports, Financial Summary and Detail Reports	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 602 - Annual Financial Reports
603	Activity Fund Cash Journal & Ledger	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 603 - Activity Fund Cash Journal
604	Bond Register	20 years after issue expires	Electronic/paper until scanned then electronic	FY2001 and prior	Records - Financial > 604 - Bond Register
605	Securities	Permanent	Electronic/paper until scanned then electronic permanent	FY2020 and prior as long as electronic record on file	Records - Financial > 605 - Securities
606	Investment Ledger – Report of investments owned by District	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 606 - Investment Ledger
607	Foundation Distribution – Report from the Ohio Dept. of Education for bi-monthly foundation (state basic aid) receipts	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Receipts/Refunds
608	Tax Settlements (Semi-Annual) and Advances – Property tax settlement sheet including advances from the County Auditor included in the receipts	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Receipts/Refunds
609	Budgets (Annual) - Tax budget that is submitted annually to the County Auditor	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 609 - Budgets (Annual)
610	Budget Working Papers	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 610 - Budget Working Papers
611	Insurance Policies – Contracts between insurer and the School district where the insurer, in exchange for premium payment, pays for damages to the School District which are caused by covered perils under the policy language.	15 years after expiration provided all claims settled	Electronic/paper until scanned then electronic	FY2006 and prior	Records - Contracts
612	Contracts – An agreement with specific terms between an entity with the School District	15 years after expiration	Electronic/paper until scanned then electronic	FY2006 and prior	Records - Contracts
613	Bonds and Coupons	Until redeemed provided audited	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Financial > 613 - Bonds and Coupons
614	Accounts Payable Ledger – Outstanding payables	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 614 - Accounts Payable Ledger
615	Accounts Receivable Ledgers – Outstanding revenue due to the school District	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 615 - Accounts Receivable Ledgers
616	Vouchers, Invoices and purchase orders – A voucher is a documentary record of a business transaction (i.e. check or invoice). A purchase order is a document itemizing products/services to be purchased from a vendor. Serves as a contract.	10 years provided audited. ORC 3313.29.	Electronic/paper until scanned then electronic	FY2011 and prior	Financial Packet
617	State Program Files – Auxiliary services, records of non-public school funding provided by the Ohio Department of Education and through public and private grants	10 years provided audited	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Financial - 617 - State Program Files
618	Federal Programs – Title I (Student Progress Reports), II, III, IV-B, IDEA, IV-C, VI-B, Chapter 1, 2; Drug Free, etc.	10 years provided audited	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Financial > 618 - Federal Programs
619	Travel Expense Vouchers – Document of expenditures for travel of district employees	10 years provided audited	Electronic/paper until scanned then electronic	FY2011 and prior	Financial Packet
620	Tax Anticipation Notes – Documents related to the preparation, sale and history related to issuance of notes borrowed against future tax dollars	10 years provided audited	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Financial > 620 - Tax Anticipation Notes
621	State Reimbursement Settlement Sheets	5 years provided audited	Electronic/paper until scanned then electronic	FY2016 and prior	Receipts/Refunds
622	Unemployment Claims – Documentation of unemployment for application of unemployment benefits	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 622 - Unemployment Claims
623	Employee Bonds, Board Member Bonds – Documents related to the performance and theft insurance bidder held on required employee and board members	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 623 - Employee Bonds



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

SCH. #	RECORD SERIES AND DESCRIPTION	RETENTION PERIOD	MEDIA TYPE	YEARS ELIGIBLE FOR DISPOSAL	SC View Storage Location Available
624	Certificate of Estimated Resources – County document supplied to the district certifying the estimated resources prepared by the District	15 years after expiration	Electronic/paper until scanned then electronic	FY2006 and prior	Records - Financial > 624 - Certificate of Estimated Resources
625	Appropriation Resolutions – Resolution approved by the Board of Education establishing and amending the appropriation for the District	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Financial > 625 - Appropriation Resolutions
626	Tax Apportionments (Semi-Annual) – Documentation prepared by the County Auditor and report to the District to record receipt of property tax settlement	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Receipts/Refunds
627	Canceled Checks and Bank Settlements – All checking accounts reconciliation and statements	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 627 - Canceled Checks and Bank Statements
628	Publication Notice – Legal notice of publication in the newspaper	4 years	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 628 - Publication Notice
629	Tuition Fees and Payments – Receipt records at the Treasurer's Office	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 629 - Tuition Fees and Payments
630	Unpaid Student Fees	Through graduation	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Financial > 630 - Unpaid Student Fees
631	School Finance (S.F.) Monthly Statements – Bi-monthly reports for the Ohio Dept. of Education to record receipts and expenditures related to the foundation payments.	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 631 - School Finance Monthly Statements
632	Investment Records – Individual record of investments bank confirmations, wire transfers, copies of CD's	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 632 - Investment Records
633	Travel Expense Reports	10 years provided audited	Electronic/paper until scanned then electronic	FY2011 and prior	Financial Packet
634	State Sales Tax Reports – State of Ohio semi-annual sales tax filings, reporting any taxable sales.	4 years provided audited	Electronic/paper until scanned then electronic	FY 2017 and prior	Records - Financial > 634 - State Sales Tax
635	Student Activity Funds – Student activity funds, pay in forms, bank deposit forms and receipts confirming deposits made into student activity accounts	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Receipts/Refunds
636	Check Registers – Lists of checks issued by the District	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 636 - Check Registers
637	Deposit Slips/Cash Proofs – Receipts for deposit slips	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Receipts/Refunds
638	Receipt Books – Receipts issued for money received.	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	n/a
639	Extra Trip Records	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 639 - Extra Trip Records
640	Monthly Financial Reports – Report generated from the system to report the financial status the District prepared on a monthly basis	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 640 - Monthly Financial Reports
641	Accounting Data – Documentation of bids supplied by vendors for any project requesting bids in compliance with ORC	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 641 - Accounting Data
642	Service Contracts – Contracts for services provided from an outside education	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Contracts
643	State Subsidy Reports – Applications for driver education, pupil transportation and special education	3 years provided audited	Electronic/paper until scanned then electronic	FY2018 and prior	Records - Financial > 643 - State Subsidy Reports
644	Delivery/Packing Slips	1 year provided audited	Electronic/paper until scanned then electronic	FY2020 and prior	Financial Packet
645	Requisitions – Documents used to request the purchase of something that is submitted for approval and then can be converted to a purchase order	1 year after end of fiscal year	Electronic/paper until scanned then electronic	FY2020 and prior	Financial Packet
646	Non-Sufficient Fund Checks Documentation & Notifications	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 646 - Non-Sufficient Fund Checks
Payroll Related Records					
701	Salary Continuation Agreement – Agreement stating full or partial compensation during period of disability	7 years	Electronic/paper until scanned then electronic	FY2014 and prior	Records - Payroll > 701 - Salary Continuation Agreement
705	Bureau of Employment Service Quarterly Reports – OBES reports (quarterly earnings and record of weeks worked by employee)	7 years	Electronic/paper until scanned then electronic	FY2014 and prior	Records - Payroll > 705 - Bureau of Employment Service Qtrly Reports
706	W-2's and W-4's – Employer's copy of calendar year record of taxable earnings, a record of employee federal exemptions	6 years and current provided audited	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Payroll > 706 - W-2's and W-4's
707	Federal Income Tax – Quarterly and annual record of federal income tax withheld and remitted IRS form 941	6 years and current provided audited	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Payroll > 707 - Federal Income Tax
708	Ohio Income Tax – Monthly and annual record of Ohio Income tax withheld and remitted IT-4	6 years and current provided audited	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Payroll > 708 - Ohio Income Tax
709	City Income Tax – Monthly and annual record of municipality income tax withheld and remitted	6 years and current provided audited	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Payroll > 709 - City Income Tax
710	School Income Tax – Monthly and annual record of School District income tax withheld and remitted SDIT-1	6 years and current provided audited	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Payroll > 710 - School Income Tax
711	Payroll Reports – Payroll deduction and distribution reports	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 711 - Payroll Reports
712	Payroll Update Listing	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 712 - Payroll Update Listing
713	Payroll Calculations – Paper and electronic reports used to balance gross net calculations	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 713 - Payroll Calculations
715	State Employees Retirement System (SERS) - Record of SERS withholdings monthly	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 715 - SERS Reports
716	State Teachers Retirement System (STRS) Record of STRS withholdings per pay and annual	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 716 - STRS Reports
717	Annuity Reports	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 717 - Annuity Reports



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

SCH. #	RECORD SERIES AND DESCRIPTION	RETENTION PERIOD	MEDIA TYPE	YEARS ELIGIBLE FOR DISPOSAL	SC View Storage Location Available
718	Benefit Folders/Reports – Listing of employee's benefit enrollments	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 718 - Benefit Folders/Reports
719	Employee Requests and/or Authorization for Leave Forms – Request for sick, vacation, personal, or other leave	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 719 - Employee Leave Request
720	Deduction Reports – Voluntary payroll deductions per pay that include all deduction withholdings for each employee	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 720 - Deduction Reports
721	Employee Vacation/Sick Leave Records - Records of each employee's sick and vacation leave	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 721 - Employee Vacation/ Sick Leave
722	Time Sheets - Record of hours worked	6 years provided audited	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Payroll > 722 - Time Sheets
723	Overtime Authorization	6 years	Electronic/paper until scanned then electronic	FY2015 and prior	Records - Payroll > 723 - Overtime Authorization
724	Employee Insurance Bills – Monthly reconciliation of employee medical, dental and life insurance bills	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 724 Employee Insurance Bills
725	Paycheck Register – Listing of checks issued each pay	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 725 - Paycheck Register
726	Payroll Bank Statement – Includes bank statements and reconciliation	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Financial > 627 - Cancelled Checks and Bank Statements
727	Deduction Authorization – Forms to withhold deductions from an employee's pay	Until superseded or employee terminates	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Payroll > 727 - Deduction Authorization
728	Court Ordered Garnishments	4 years after cause fully paid	Electronic/paper until scanned then electronic	FY2017 and prior	Records - Payroll > 728 - Court Ordered Garnishments
Reports					
801	State Audits /GAAP (Generally Accepted Accounting Principles) Reports– Annual financial audit reports	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 801 - State Audits/GAAP
802	Special Education (S.E.) Reports – Annual	7 years	Electronic/paper until scanned then electronic	FY2014 and prior	Records - Reports > 802 - Special Ed Reports
803	Vocation Education (V.E.) Reports - Annual	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 803 - Vocational Education
804	Ohio Common Core Data (OCCD) Reports: Data on revenues and expenditures per pupil made by school districts.	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 804 - Ohio Common Core Data
805	Drivers Education Report	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 805 - Drivers Ed Report
806	Ohio Department of Education (ODE) Reports – Academic reports from the Ohio Department of Education	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 806 - Ohio Dept of Education (ODE) Reports
807	Alternative Learning Experience - Records documenting student participation in an alternative learning experience program. Includes but is not limited to: Letter of attestation/statement of understanding; district release form and/or shared agreement (if sharing student); written student learning plan (start/stop dates), approval date when district/teacher approves plan; estimated hours per week of student participation; instructional materials needed; timelines and methods for evaluating student progress; specific learning goals/objectives/requirements; student/teacher instructional two-way interactions/contacts/ monthly progress evaluations and weekly communications with student (and parent/legal guardian for student grades K-8) including dates when occurred	Retain for 5 years after end of school year then destroy.	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 807 - Alternative Learning Experience
808	Civil Rights Reports – U.S. Department of Education Civil Rights Data Collection and any past reports	Permanent	Electronic/paper until scanned then electronic permanent	FY2020 and prior as long as electronic record on file	Records - Reports > 808 - Civil Rights Reports
809	Title IX Reports – Includes any required reporting as requested by state or federal agencies	10 years	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Reports > 809 - Title XI Reports
810	State Minimum Standards – A record of minimum standards given to the District by the State Department	10 years	Electronic/paper until scanned then electronic	FY2011 and prior	Records - Reports > 810 - State Minimum Standards
811	Personnel State Reports (SF-1, CS-1)	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and Prior	Records - Reports > 811 - Personnel State Reports
812	Worker's Comp Wage Reports	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 812 - Worker's Comp Wage Reports
813	Worker's Comp Payroll Reports	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 813 - Worker's Comp Payroll Report
814	Bank Balance Certification (Co. Auditor)	5 years	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Reports > 814 - Bank Balance Certification
815	Transportation Reports – State transportation reports, T-1 and T-2	4 years provided audited	Electronic/paper until scanned then electronic	FY2017 and Prior	Records - Reports > 815 - Transportation Reports
816	EMIS Reports	7 years	Electronic/paper until scanned then electronic	FY2014 and prior	Records - Reports > 816 - EMIS Reports
General Records					
901	Directives, Standards, Laws for Local, State, and Federal Governmental Agencies	Until Superseded	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept. > General Records > 901 - Directives, Standards, Laws
902	Executive Correspondence – Correspondence of the District Superintendent and Administrative staff dealing with significant aspects of the administration of the District. Includes information concerning agency policies, procedures, program, fiscal and personnel matters.	5 years; file with related records if content requires longer retention; appraise for historical value.	Electronic/paper until scanned then electronic	FY2016 and prior	Records - Central Dept. > General Records > 902 - Executive Correspondence



BIG WALNUT LOCAL SCHOOL DISTRICT ADMINISTRATIVE OFFICE

Permission For Record Disposal - May 2022

SCH. #	RECORD SERIES AND DESCRIPTION	RETENTION PERIOD	MEDIA TYPE	YEARS ELIGIBLE FOR DISPOSAL	SC View Storage Location Available
903	General Correspondence – Requests for information pertaining to interpretations and other misc. inquiries; informative – does not attempt to influence policy. Including copies of outgoing correspondence maintained for reference purposes.	2 years	Electronic/paper until scanned then electronic	FY2019 and prior	Records - Central Dept. > General Records > 903 - General Correspondence
904	Transient Correspondence/Material– All informal and/or temporary messages and notes, including email and voice mail messages, and all drafts used in the production of public records that do not set policy, establish guidelines or procedures, certify a transaction or become a receipt. Includes communications which convey information of temporary importance, referral letters, and requests for routine information or publications provided to the public by the District which are answered by standard form letters	Retain until no longer of administrative value, then destroy	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept. > General Records > 904 - Transient Correspondence/Material
905	Copies, Duplicates, Non-Records - Items not included in the scope of official records as defined by ORC 149.011 (G) which may include convenience copies, described as non-official copies of records, used for convenient reference, that duplicate official records kept by the office of record.	Until no longer of administrative value	Electronic/paper until scanned then electronic	FY2020 and prior	Records - Central Dept. > General Records > 905 - Copies, Duplicates, Non-Records
906	Exposure Reports – Report of contact with blood or other potentially infectious materials	7 years	Electronic/paper until scanned then electronic	FY2014 and prior	Records - Central Dept. > General Records > 906 - Exposure Reports
907	Incident/Accident Reports – A report of student/employee injuries or accidents including place, time and witnesses	7 years provided no action pending	Electronic/paper until scanned then electronic	FY2014 and prior	Records - Central Dept. > General Records > 907 - Incident/Accident Reports

CONFIDENTIAL INFORMATION MUST BE SHREDDED

Treasurer Approval

Date

Note: Treasurer's signature indicates approval given by the Big Walnut Records Commission.