

RECORD RETENTION AND DESTRUCTION

Key to Schedule

1000	Board and Administrative Records
2000	Employee Records
3000	Student Records
4000	Building Records
5000	Central Department
6000	Financial Records
7000	Payroll Related Records
8000	Reports
9000	Other

Section E: Records Retention Schedule
East Holmes Local Schools

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS-LGRP
1000	BOARD AND ADMINISTRATIVE RECORDS					
1101	Minutes	Superintendent/ Treasurer Office	Permanent	Paper or Electronic		
1102	Blue, Prints, Plans, Maps	Superintendent/ Maintenance Office	Permanent	Paper		
1103	Deeds, Easements, Leases	Treasurer Office	Permanent	Paper		
1104	Board Policy Books and Other Adopted Policies	Superintendent Office	1 year after superseded	Paper or Electronic		
1105	Administrative Regulations	Superintendent Office	1 year after superseded	Paper or Electronic		
1106	Court Decisions	Superintendent/ Treasurer Office	Permanent	Paper		
1107	Claims and Litigation	Superintendent/ Treasurer Office	Permanent	Paper		
1201	Elections	Treasurer Office	10 Years	Paper		
1202	Records Disposal forms (RC-3)	Treasurer Office	10 Years after Expiration	Paper		
1203	Bargaining Agreements	Superintendent/ Treasurer Office	10 Years after Expiration	Paper		
1204	Budget Policy Files	Treasurer Office	5 Years	Paper		
1301	Worker's Compensation Forms	Treasurer Office	10 Years after Financial Payment Made	Paper		
1302	Bank Depository Agreements	Treasurer Office	4 Years after Completion	Paper		
1303	Organization Reports	Treasurer Office	2 Years**	Paper		
1304	Board Meeting Notices	Superintendent Office	1 Year	Paper or Electronic		
1305	Agendas	Superintendent/ Treasurer Office	1 Calendar Year**	Paper or Electronic		
1401	Adopted Courses of Study	Superintendent/ Curriculum Office	Until Superseded	Paper		
1402	Adopted Special Education Programs	Special Education Office	Until Superseded	Paper		
1403	Adopted Special Programs	Special Education Office	Until Superseded	Paper		

*After end of fiscal year

**Provided Audited

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS-LGRP
2000	EMPLOYEE RECORDS (Employee files include employment applications, resumes, contracts/salary notices, Evaluations, personnel actions, absence certification, transcripts and any other documents which become part of the file.)					
2101	Certified Active Employees	Superintendent Office	Permanent	Paper or Electronic		
2102	Classified Active Employees	Superintendent Office	Permanent	Paper or Electronic		
2103	Certified Inactive Employees	Superintendent Office	Permanent	Paper or Electronic		
2104	Classified Inactive Employees	Superintendent Office	Permanent	Paper or Electronic		
2105	Civil Rights, Civil Services and Disciplinary Reports	Superintendent Office	Permanent	Paper		
2107	Retirement Letter	Superintendent Office	Permanent	Paper or Electronic		
2108	Substitute Records	Superintendent/ Treasurer Office	25 Years	Paper or Electronic		
2301	Employee Contracts	Treasurer Office	4 years after termination from employment	Paper or Electronic		
2302	Professional Conference Applications	Superintendent/ Treasurer Office	2 years**	Electronic		
2303	Irregular Employee Contracts	Superintendent/ Treasurer Office	4 years after contract expires	Paper or Electronic		
2304	Unemployment Claims	Treasurer Office	5 Years	Paper		
2305	Unemployment Records	Treasurer Office	5 Years	Paper		
2306	Applications (not hired)	Superintendent Office	2 Years**	Paper		
2307	Schedule of Employees	Superintendent Office	Fiscal Year plus 2 years	Paper or Electronic		
2309	Teacher Personnel Reports (Internal)	Superintendent Office	Fiscal Year plus 1 Year	Paper or Electronic		
2310	I-9 Immigration Verification Forms	Superintendent Office	Termination of Employment plus 1 year	Paper		
2401	Job Descriptions	Superintendent Office	Retain until Superseded or Obsolete	Paper or Electronic		

*After end of fiscal year

**Provided Audited

Section E: Records Retention Schedule
East Holmes Local Schools

Records Commission

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS-LGRP
3000	STUDENT RECORDS					
3101	Student Record Folders *Enrollment/Withdrawl Information *Grades/Transcripts *Activities Record *Attendance Records *Individual Test Results *Standardized Competency/Proficiency *Aptitude Intervention Records *Foreign Exchange Records *Visual Screening *Hearing Screening *Immunization Records	Building Secretary	Permanent	Paper or Electronic		
3102	Office Record Card (K-9)	Building Secretary	Permanent	Paper or Electronic		
3202	Discipline Records Letters to Parents Office Discipline	Building Secretary	1 Year After Graduation	Paper or Electronic		
3203	Psychological Records (restricted)	Special Education Office	Permanent	Paper or Electronic		
3204	Child Abuse/Neglect Referral Letters	Building Secretary	Through Graduation	Paper		
3205	Formal Complaints Against Student	Building Secretary	Until Graduation	Paper		
3301	Teacher Grade Book/Records	Building Secretary	3 Years			
3302	Pre-School Screening Profiles	Building Secretary	3 Years	Paper		
3303	Age and Schooling Records (Work Permits)	Superintendent Office	3 Years	Paper		
3304	Accident Reports	Building Secretary	5 Years provided no pending action	Paper		
3305	Individual Educational Plan (IEP)	Special Education Office	Permanent	Paper or Electronic		
3306	Free/Reduced Price Lunch Application	Superintendent /Cafeteria Supervisor	4 Years	Paper or Electronic		
3401	Emergency Information Card	Building Secretary	Until Superseded	Paper		

*After end of fiscal year

**Provided Audited

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
4000	BUILDING RECORDS					
4202	Tornado and Fire Drill Records	Superintendent Office/Building Secretary	1 Year*	Paper		
4203	Building Health Inspections	Building Secretary/ Maintenance Office	2 Years*	Paper		
4301	Student Activity Records Pay-in Forms Pay-out Forms Account Forms/District Budget Form Ticket Sales Report	Treasurer Office	2 Years	Paper		
4302	Receipts/Deposit Slips	Treasurer Office	4 Years**	Paper or Electronic		
4303	Budget Records	Treasurer Office	4 Years**	Paper or Electronic		
4304	Requisition/Purchase Orders	Treasurer Office	4 Years	Paper or Electronic		
4401	Textbook Inventory	Building Secretary/Curriculum	Until Superseded	Paper or Electronic		
4402	Supplies Inventory	Building Secretary	Until Superseded	Paper or Electronic		
4403	Student Handbooks	Building Secretary	Until Superseded	Paper		

*After end of fiscal year

**Provided Audited

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS-LGRP
5000	CENTRAL DEPARTMENTAL RECORDS -ADMINISTRATION					
5201	School Calendars	Superintendent Office	5 years	Paper or Electronic		
5301	Repair, Installation and Maintenance Records	Maintenance Office	4 Years**	Paper		
5302	Prevailing Wage Record	Treasurer Office	4 Years**	Paper		
5303	Rental Information (Use of Facilities)	Treasurer Office	4 Years**	Paper		
5305	Environmental Reports and Data (asbestos, etc.)	Superintendent/Maintenance Office	4 Years**	Paper		
5306	Vandalism Reports	Superintendent/Treasurer Office	4 Years**	Paper		
5307	Student Activity Purpose Clauses	Treasurer Office	4 Years**	Paper		
5308	Sales Potential Forms (Student Activities)	Treasurer Office	4 Years**	Paper		
5309	Bids and Specifications (Unsuccessful)	Treasurer Office	1 Year**	Paper		
5310	Bids And Specifications (Successful)	Treasurer Office	4 Years after completion of Project**	Paper		
5311	Contractors Files (Resolutions, additions, drawings, etc.)	Superintendent/Treasurer Office	Until Project Complete, if No Action Pending**	Paper		
5400	Vendor Listing	Treasurer Office	Until Superseded	Paper or Electronic		
5401	Preventive Maintenance Reports	Maintenance Office	Fiscal Year plus 2 Years	Paper or Electronic		
5402	Warranty/Guarantee	Maintenance Office	Life/Warranty of Equipment	Paper		
5403	Plant/Equipment Inventory	Maintenance Office/Treasurer Office	Until Superseded**	Paper or Electronic		
5404	Textbook/Workbook Inventory	Curriculum Office	Until Superseded**	Paper or Electronic		
5000	CENTRAL DEPARTMENTAL RECORDS –SPECIAL EDUCATION					
5221	Special Education Tutoring Reports	Special Education	10 years	Paper or Electronic		
5222	Individual Educational Plan (IEP)	Special Education	Permanent	Paper or Electronic		
5223	Psychological Records (Restricted)	Special Education	Permanent	Paper or Electronic		

*After end of fiscal year

**Provided Audited

Section E: Records Retention Schedule
 East Holmes Local Schools

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
5000	CENTRAL DEPARTMENTAL RECORDS – TRANSPORTATION DEPARTMENT					
5340	Driver Physical	Transportation Office	2 Years after Termination	Paper		
5341	Fuel Consumption Data	Transportation Office	4 Years**	Paper		
5342	Transportation Records	Transportation Office	4 Years**	Paper		
5343	Field Trip Forms and Volunteer Driver Forms	Transportation Office	Fiscal Year Plus 2 Years	Paper		
5441	Accident Reports (Bus)	Transportation Office	3 Years provided no action pending	Paper or Electronic		
5442	Vehicle Registration	Treasurer Office	Life of Vehicle	Paper		
5443	Vehicle License	Transportation Office	1 Year after Termination	Paper		
5445	Driver Certification	Transportation Office	1 Year after Termination	Paper		
5446	Supplies Inventory	Transportation Office	Until Superseded**	Paper		
5447	Vehicle Defect Reports	Transportation Office	Life of Vehicle	Paper		
5000	CENTRAL DEPARTMENTAL RECORDS – FOOD SERVICE DEPARTMENT					
5561	Food service Records Menus Food Production Milk Sold Students Served	Cafeteria Supervisor	4 Years**	Paper or Electronic		
5562	Lunchroom Records Cash Register Tapes Cashier's Daily Reports	Cafeteria Supervisor	4 Years**	Paper		
5563	Lunchroom Reports (Free and Reduced Report)	Cafeteria Supervisor/ Superintendent	4 Years**	Paper or Electronic		
5564	Inventories	Cafeteria Supervisor	Until Superseded**	Paper or Electronic		
5565	Lunchroom License	Cafeteria Supervisor	1 Year after expiration	Paper		

*After end of fiscal year

**Provided Audited

Section E: Records Retention Schedule
East Holmes Local Schools

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS-LGRP
6000	CENTRAL DEPARTMENTAL RECORDS – FINANCIAL RECORDS					
6101	Annual Financial Reports Appropriation Ledgers Budget Ledgers Revenue Journals Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports Financial Summary Detail Reports	Treasurer Office	5 Years**	Paper or Electronic		
6102	Activity Fund Cash Journal and Ledger	Treasurer Office	5 Years**	Paper or Electronic		
6103	Bond Register	Treasurer Office	20 years after issue expires	Paper		
6104	Securities	Treasurer Office	Permanent	Paper		
6201	Investment Ledger	Treasurer Office	5 years**	Paper or Electronic		
6202	Foundation Distribution	Treasurer Office	5 Years**	Paper		
6203	Tax Settlements (Semi-annual and Advances)	Treasurer Office	5 Years**	Paper		
6204	Budgets (Annual)	Treasurer Office	5 Years**	Paper or Electronic		
6205	Insurance Policies	Treasurer Office	15 Years after Expiration Provided all Claims Settled	Paper		
6206	Contracts	Treasurer Office/ Superintendent Office	15 Years after Expiration	Paper		
6207	Bonds and Coupons	Treasurer Office	Until Redeemed**	Paper		
6208	Accounts Payable Ledgers	Treasurer Office	5 Years**	Paper or Electronic		
6209	Accounts Receivable Ledgers	Treasurer Office	5 Years**	Paper or Electronic		
6210	Budget Work Papers	Treasurer Office	5 Years**	Paper or Electronic		
6211	Vouchers, Invoices and Purchase Orders	Treasurer Office	10 Years**	Paper or Electronic		
6212	State Program Files Aux. Services, DPPF, Adult Vocational, Excess Lottery, Data Processing, Public/Private Grants, Etc.	Treasurer Office	10 Years**	Paper or Electronic		

*After end of fiscal year

**Provided Audited

Section E: Records Retention Schedule
East Holmes Local Schools

Records Commission

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
6000	CENTRAL DEPARTMENTAL RECORDS – FINANCIAL RECORDS CONTINUED					
6213	Federal Program Files	Treasurer Office and Grants Coordinator Office	10 Years**	Paper		
6214	Travel Expense Vouchers	Treasurer Office	10 Years**	Paper or Electronic		
6215	Tax Anticipation Notes	Treasurer Office	10 Years**	Paper		
6216	State Reimbursement Settlement Sheets	Treasurer Office	5 Years**	Paper		
6217	Unemployment Claims	Treasurer Office	5 Years**	Paper		
6218	Employee Bonds, Board Member Bonds	Treasurer Office	5 Years**	Paper		
6219	Certificate of Estimated Resources	Treasurer Office	15 Years after Expiration	Paper		
6220	Appropriation Resolution	Treasurer Office	5 Years**	Paper		
6222	Tax Apportionments (semi-annual)	Treasurer Office	5 Years**	Paper		
6301	Canceled Checks and Bank Statements	Treasurer Office	4 Years**	Paper		
6302	Publications and Legal Notices	Superintendent Office	4 Years**	Paper		
6303	Tuition Fees and Payments	Treasurer Office	4 Years**	Paper or Electronic		
6304	School Finance Monthly Statements	Treasurer Office	4 Years**	Paper or Electronic		
6305	Investment Records	Treasurer Office	4 Years**	Paper or Electronic		
6306	Travel Expense Reports	Treasurer Office	10 Years**	Paper or Electronic		
6307	State Sales Tax Reports	Treasurer Office	4 Years**	Paper or Electronic		
6308	Student Activity Fund (Pay-ins, Pay- outs, Receipt/Deposit Reports)	Treasurer Office	4 Years**	Paper		
6309	Check Register	Treasurer Office	4 Years**	Paper or Electronic		
6310	Deposit Slips/Cash Proofs	Treasurer Office	4 Years**	Paper or Electronic		
6311	Bids and Specifications (Unsuccessful)	Treasurer Office	1 Years**	Paper		
6312	Bids and Specifications (Successful)	Treasurer Office	4 Year after completion of project**	Paper		
6313	Receipt Books	Treasurer Office	4 Years**	Paper or Electronic		
6314	Extra Trip Records	Treasurer Office	4 Years**	Paper		

*After end of fiscal year

**Provided Audited

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
6000	CENTRAL DEPARTMENTAL RECORDS – FINANCIAL RECORDS CONTINUED					
6315	Monthly Financial Reports	Treasurer Office	4 Years**	Paper or Electronic		
6316	Accounting Data	Treasurer Office	4 Years**	Paper or Electronic		
6317	Service Contracts	Treasurer Office	4 Years**	Paper or Electronic		
6318	State Subsidy Requests Pupil Transportation Special Education, Etc.	Transportation Office	3 Years	Paper		
6319	Delivery Slips/Packing Slips	Treasurer Office	1 Year**	Paper		
6401	Requisitions	Treasurer Office	1 Year**	Paper or Electronic		
Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
7000	PAYROLL RELATED					
7001	Payroll Ledgers Bi-Weekly Payroll Reports Quarterly Reports	Treasurer Office	Permanent	Paper or Electronic		
7102	Earnings Register By Staff Member By Calendar Year	Treasurer Office	Permanent	Paper or Electronic		
7103	Monthly Payroll Reports Leave usage and accumulation, Retirement service, etc.	Treasurer Office	Permanent	Paper or Electronic		
7201	Bureau of Employment Service Quarterly Reports	Treasurer Office	Permanent	Paper or Electronic		
7301	W-2's, W-4's (employer copy)	Treasurer Office	6 Years and Current	Paper or Electronic		
7302	Federal Income Tax (Quarterly/Annual)	Treasurer Office	6 Years and Current	Paper or Electronic		
7303	Ohio Income Tax (Monthly/Annual)	Treasurer Office	6 Years and Current	Paper or Electronic		
7304	City Income Tax (Monthly/Annual)	Treasurer Office	6 Years and Current	Paper or Electronic		
7305	School Income Tax (Monthly/Annual)	Treasurer Office	6 Years and Current	Paper or Electronic		
7306	Payroll Reports –Computer Generated Each Payroll	Treasurer Office	4 Years and Current	Paper		

*After end of fiscal year

**Provided Audited

Section E: Records Retention Schedule
East Holmes Local Schools

Records Commission

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
7000	PAYROLL RELATED CONTINUED					
7307	Payroll Updated Listing	Treasurer Office	4 Years**	Paper or Electronic		
7308	Payroll Calculations	Treasurer Office	4 Years**	Paper or Electronic		
7309	State Teacher's Retirement System And School Employees Retirement System Waivers	Treasurer Office	Permanent	Paper		
7310	State Employees Retirement System Reports	Treasurer Office	4 Years**	Paper or Electronic		
7311	State Teachers Retirement System Reports	Treasurer Office	4 Years**	Paper or Electronic		
7312	Annuity Reports	Treasurer Office	4 Years**	Paper or Electronic		
7313	Benefit Folders/Reports	Treasurer Office	4 Years**	Paper or Electronic		
7314	Employee Request and/or Authorization for Leave Forms (Sick, Vacation, Personal, or other Leave)	Treasurer Office	4 Years**	Paper or Electronic		
7315	Deduction Reports Voluntary Payroll Deductions	Treasurer Office	4 Years**	Paper or Electronic		
7316	Employee Vacation/Sick Leave Reports	Treasurer Office	4 Years**	Paper or Electronic		
7317	Time Sheets	Treasurer Office	6 Years**	Paper or Electronic		
7318	Overtime Authorization	Treasurer Office	6 Years**	Paper or Electronic		
7319	Employee Insurance Bills Medical, Dental, Life	Treasurer Office	4 Years**	Paper		
7323	Paycheck Register	Treasurer Office	4 Years**	Paper or Electronic		
7324	Payroll Bank Statement	Treasurer Office	4 Years**	Paper or Electronic		
7401	Deduction Authorization	Treasurer Office	Until Superseded	Paper		

*After end of fiscal year

**Provided Audited

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
8000	REPORTS					
8201	State Audit Reports	Treasurer Office	5 Years	Paper		
8204	School Finance Reports Annual	Treasurer Office	5 Years	Paper		
8205	Special Education Reports Annual	Special Education	7 Years	Paper or Electronic		
8207	Ohio Common Core Reports	Superintendent	5 Years	Paper or Electronic		
8209	Ohio Department of Education Reports	Curriculum Office	5 Years	Paper or Electronic		
8211	Civil Rights Report	Superintendent	Permanent	Paper or Electronic		
8212	Title IX Reports	Superintendent	10 Years	Paper		
8213	SM-1 and SM-2 (Quarterly/Annual)	Treasurer Office	10 Years	Paper or Electronic		
8214	State Minimum Standards	Superintendent	10 Years	Paper or Electronic		
8301	Personnel State records Currently SF-1, CS-1	Treasurer Office	4 Years**	Paper or Electronic		
8302	Worker's Comp Wage Reports (Co. Auditor)	Treasurer Office	5 Years	Paper or Electronic		
8303	Bank balance Certification	Treasurer Office	5 Years	Paper or Electronic		
8304	Transportation Reports	Transportation	4 Years**	Paper or Electronic		

*After end of fiscal year

**Provided Audited

Section E: Records Retention Schedule
 East Holmes Local Schools

Records Commission

Schedule Number	Records Title and Description		Retention Period	Media Type	Auditor of State/ OHS LGRP	RC-3 Required by OHS- LGRP
9000	OTHER					
9101	Personnel Directory	Superintendent	10 Years	Paper or Electronic		
9102	Enrollment Records by Grade	Superintendent/EMIS	Permanent	Paper or Electronic		
9202	School Calendars	Superintendent	5 Years	Paper or Electronic		
9203	Building, Boilers, Maintenance Reports	Maintenance Office	2 Years*	Paper		
9402	Employee Handbooks	Superintendent	Until Superseded	Paper or Electronic		
9403	Directives, Standards, Laws for Local, State and Federal Governments	All Secretaries	Until Superseded	Paper or Electronic		
9404	Attendance Records	Superintendent/EMIS	Until Superseded	Paper or Electronic		

*After end of fiscal year

**Provided Audited