

RECORDS RETENTION AND DISPOSITION MANUAL

for

The Frederick County School System

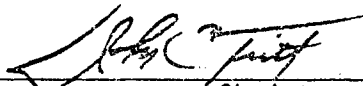
Board of Education of Frederick County
115 East Church Street
Frederick, Maryland 21701


May, 1975


RECORDS RETENTION AND DISPOSITION

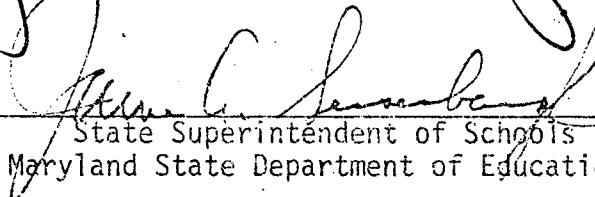
A REFERENCE MANUAL

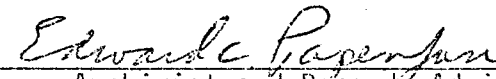
FOR THE FREDERICK COUNTY SCHOOL SYSTEM

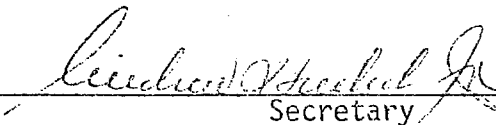
APPROVED:  June 2, 1975
Chairman
Records Retention and Disposition Task Force Date

APPROVED:  June 2, 1975
Assistant Superintendent for Instruction Date

APPROVED:  June 2, 1975
County Superintendent of Schools Date

APPROVED:  July 28, 1975
State Superintendent of Schools
Maryland State Department of Education Date

APPROVED:  August 1, 1975
Archivist and Records Administrator
Maryland Hall of Records
Department of General Services Date

APPROVED:  Sept 22, 1975
Secretary
Board of Public Works
State of Maryland Date

The above signatures constitute legal approval of the record retention schedules contained in this manual.

BOARD OF EDUCATION OF FREDERICK COUNTY

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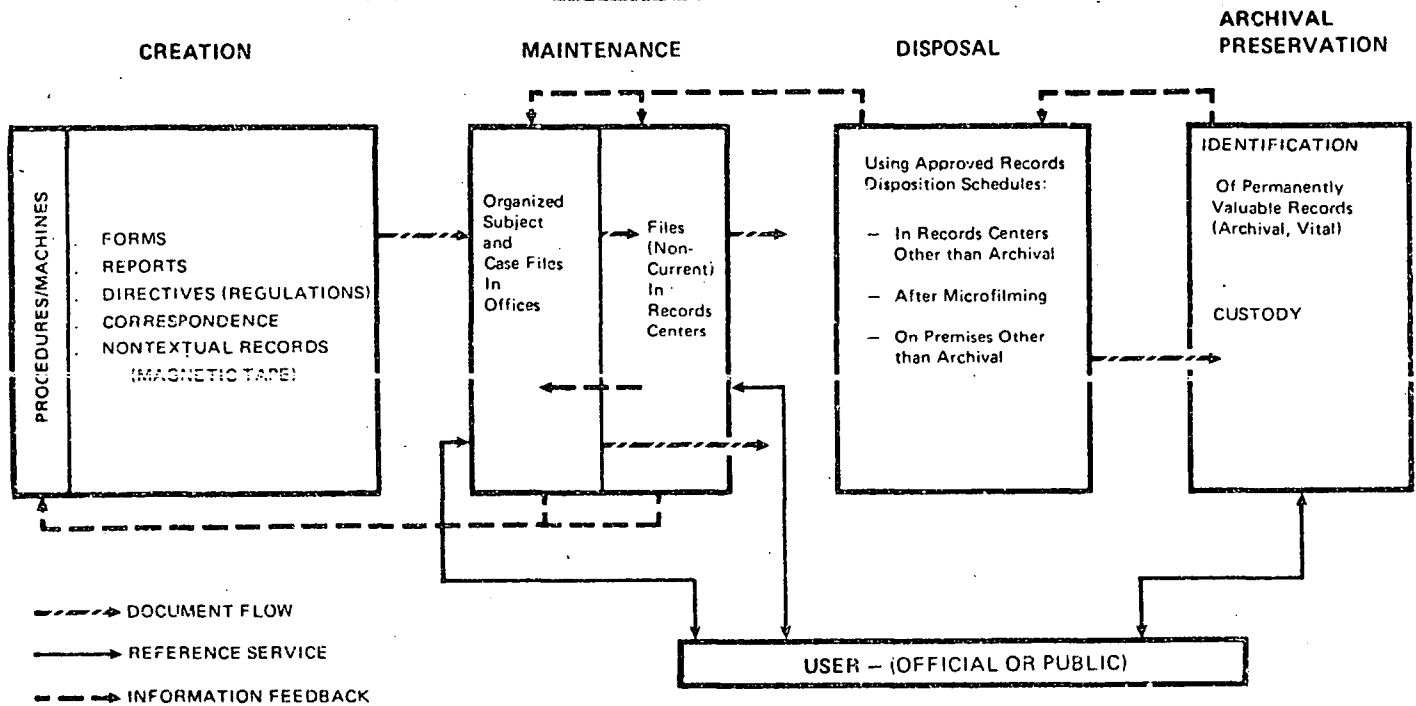
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SECTION 1. INTRODUCTION

The purpose of this reference manual is to provide guidelines and standards to the Frederick County School System for the establishment of effective records retention and disposition programs. These guidelines, developed by the Task Force on Retention and Disposition of State and Local School Records, are consistent with the legal requirements imposed by Article 76A, Public Information, and Article 54, Hall of Records, of the Annotated Code of Maryland. (See Appendix A.)

Records management is a recognized discipline of increasing importance. It is concerned with the creation, maintenance, protection, retention, preservation and disposition of records. The scope of a records management program is illustrated in the diagram below.

SCOPE OF THE RECORDS MANAGEMENT PROGRAM



Adapted from Table in THE RECORDS OF A NATION by H. G. Jones
ATHENEUM, New York 1969

Records retention and disposition management is one aspect of the total program. A records retention schedule is a written plan for records retention and disposition; it identifies the time at which the removal and disposal of records can take place.

INITIATING REVISIONS TO THE MANUAL

Changes to the contents of this manual require the approval of the Maryland State Department of Education, the Maryland Hall of Records, and the State Board of Public Works. A suggested revision should be forwarded by the LEA official responsible for the local records management program to the Division of Research, Evaluation, and Information Systems of the Maryland State Department of Education. This Division will evaluate the suggestion and will either unilaterally initiate procedures to obtain the required authorization or will reconvene the State Task Force on Records Retention and Disposition of Maryland Public School Records to obtain a consensus before proceeding. (The task force includes representatives from each LEA.)

The Records Retention and Disposition Manual for the Frederick County School System shall be reviewed once each year to provide for up-dating and for suggested revisions. The Chairman of the Records Retention and Disposition Task Force shall schedule the meeting(s) necessary for this review, and see to it that changes are properly made and incorporated into the manual.

SECTION 2. THE RECORDS RETENTION SCHEDULE

For the purpose of this manual, all written or printed materials relating to the public school system of Frederick County are categorized as either records or nonrecords.

RECORDS DEFINED

Records include any papers, correspondence, forms, reports, minutes of formal meetings, photographs, films, sound recordings, maps, drawings of other documents regardless of form or characteristics that are made or received by public educational agencies of the State of Maryland in the transaction of public business.

Permanent records are those of enduring administrative, legal, financial, historical (archival) or research value and consequently should be retained indefinitely. They may be active or inactive, but are not disposable.

Disposable records include records which reach a point of inactivity and are of no further administrative, legal, financial or historic value; they may be disposed of after the retention period specified in the records retention schedule has elapsed.

NONRECORDS DEFINED

Nonrecords include extra copies of records and/or copies of books, magazines, newspapers, bulletins, and other library or museum materials made or acquired for reference or exhibition purposes, stocks of publications, acceptance or refusals of invitations or other personal business of public officials. In addition, nonrecord status has been extended to include letters of transmittal, routing slips, temporary administrative materials such as suspense (draft) or convenience copies, and stenographic notes that have been transcribed.

RECORDS RETENTION SCHEDULE DEFINED

The records retention schedule is the authority for the disposition of records. The schedule consists of a list of records, with or without description, and an indication of the length of time (retention period) that must elapse before disposition may take place.

DISPOSITION OF RECORDS

The laws of the State of Maryland require that records be kept a minimum of three years. Schedules for the retention or disposition of records and nonrecords such as appear in the schedule in this manual, must be approved by the Maryland State Department of Education, the Hall of Records, and the Board of Public Works.

STRUCTURE OF THE RECORDS RETENTION SCHEDULE

The Records retention schedule in this manual is divided into three parts:

Part 1. Records Prescribed or Required by the Maryland State Department of Education (MSDE)

This part of the schedule lists all reports and records prescribed by the Maryland State Department of Education for use by the LEA or for communicating information to MSDE. The records in Part 1 are arranged by the operating unit within MSDE that prescribes the reporting form or to which the LEA sends a particular report or record. Part 1 sets forth the disposition schedule to be implemented by all local education agencies.

Part 2. Records Prescribed by the Frederick County School System

Part 3. Areas of Responsibility

SECTION 3. PROCEDURES FOR DESTRUCTION OF RECORDS

GENERAL CONSIDERATIONS

1. No statement in the manual shall be construed to authorize the destruction of records that have been in custody for less than three years or for such other period or condition that may be expressly required.
2. Public school system records or series of records that are subject to audit must be retained until such time as reports of the audit have been received and accepted by the appropriate officials or the retention period has been satisfied, whichever is longer. As some records are subject to more than one audit or are audited by more than one agency, all audit requirements must be satisfied.
3. The records of discontinued schools remain the responsibility of the LEA and are governed by the same schedules as those issued for the records of existing schools.
4. All questions relating to the contents of Part I of this manual should be directed in writing to the Assistant State Superintendent, Division of Research, Evaluation, and Information Systems, Maryland State Department of Education.
5. All questions relating to the contents of Part II of this manual should be directed in writing to the Chairman or the Records Retention and Disposition Task Force, Board of Education of Frederick County.

Records scheduled for destruction shall be assigned to the following categories and destroyed as indicated:

1. Confidential records - shred or burn under the supervision of the staff member responsible for the records or his designee.
2. All other records - dispose of as wastepaper, burn or bury (landfill). Supervision is not required.

After records have been destroyed, the CERTIFICATE OF RECORDS DISPOSAL, MSDE Form No. REIS 074-1 (12/72) (See page 6), must be sent in duplicate to the Maryland State Department of Education; Attention: Assistant State Superintendent, Division of Research, Evaluation, and Information Systems.

CERTIFICATE OF RECORDS DISPOSAL
MARYLAND PUBLIC SCHOOL SYSTEMS (LEA's)

Local Education Agency submit in duplicate to the Division of Research, Evaluation, and Information Systems, Maryland State Department of Education, P.O. Box 8717, Friendship International Airport, Baltimore, Maryland 21240

Reporting LEA _____

Maryland State Department of Education will forward original certificates to

HALL OF RECORDS COMMISSION
STATE OF MARYLAND

Division of Reporting LEA _____

Index Number	Item Number	Form Number	Brief Description of Records	Number of Each Record	Inclusive Dates of Records Disposed of	Date of Disposal	Method of Disposal SHRED - SH BURN - BN BURY - BY
1.1.E	10	BWP-24	Sponsor's Invoice	129	6/30/65 - 7/15/69	8/30/72	BN
1.1.E	2	N-A	NDEA Act Title III	79	4/5/64 - 8/5/68	8/30/72	BY
1.2.A	1	CA-C-19	Recommendation Form	34	2/1/62 - 4/9/68	8/30/72	SH
LEA	452	32-753	Petty Cash Verification	270	3/5/66 - 10/1/68	8/30/72	SH
..... E X A M P L E S							
0							

Enter estimate of total cubic footage of records disposed of on last page only of certificates submitted

_____ cubic footage

I hereby certify that the above listed records were disposed of as indicated.

Signature

Title

Date

Page _____ of _____

SECTION 4. TRANSMITTAL OF RECORDS TO THE MARYLAND HALL OF RECORDS

Frederick County is responsible for providing suitable storage space for records, except in those rare cases in which records are determined to be of archival quality by the Hall of Records and are accepted for deposit in the State Archives. The Maryland State Record Centers do not have adequate space to accept records from LEA's for storage.

Frederick County is encouraged to preserve and make available for legitimate purposes original copies of documents of local historic significance.

RECORDS RETENTION AND DISPOSITION SCHEDULE

PART I

RECORDS PRESCRIBED BY THE MARYLAND STATE DEPARTMENT OF EDUCATION

RECORDS RETENTION AND DISPOSITION SCHEDULE

The retention schedule for public school records is divided into two parts for the purposes of this manual. Part 1 lists those records prescribed for local education agencies (LEA's) by the Maryland State Department of Education (MSDE). Part 2, lists Frederick County devised reports and supportive records. In addition, certain nonrecords are listed in order to establish minimal retention periods and to simplify disposition procedures for both record and nonrecord materials at the local level. Users of this manual are advised that all public school records, whether generated at the state or local level, are governed by the provisions of state law.

PART 1: Reports and Supportive Records Prescribed by MSDE for LEA's

Records in this part of the retention schedule are listed in a format which includes the form number, if available, the record title or description, whether the record is confidential, the location of the record copy, retention period (years, unless noted) of the record copy, and optional retention period for extra copies, if desired by the LEA.

ABBREVIATIONS:

NR - Nonrecord

P - Permanent

UA - Three years or until audited, whichever is later

RECORDS RETENTION AND DISPOSITION SCHEDULE

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RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance
 Office: School Facilities

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	102.1	Supporting Data for Future Capital Projects in Five Year Plan		Logistical	6	
2	102.1a	Summary of Local Education Agency Current and Five Year Requests		Logistical	6	
3	103.1	Annual Capital Budget Request		Logistical	6	
4	104.2	Request for Approval of Architect/Engineer		Supt.	3	
5	104.3	Transmittal of Agreement Between Owner and Architect (or Engineer)		Supt.	3	
6	104.3a	Standard Form of Agreement with Architects and Engineers		Logistical	P	
7	105.1	Scorecard for Selection of School Sites		Logistical	3	
8	105.1a	Immediate Vicinity Map		Logistical	3	
9	105.2	Site Submission		Logistical	P	
10	202.2	Educational Specifications Document Submission		Logistical	3*	
11	202.4	Spatial Requirements		Logistical	3*	
12	202.5	Schematic Design Submission		Logistical	3	
13	301.2	Design Development Documents Submission		Logistical	3	
14	301.2a	Cost Estimate Worksheet		Logistical	3	
15	301.2b	Fire Protection and Code Data		Logistical	3	

RECORDS RETENTION SCHEDULE NUMBER _____

Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance

Office: School Facilities

(Continued)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
16	302.1	Construction Documents Submission (including construction documents)		Logistical	P**	
17	303.3	Equipment List Transmittal		Bus Service	3	
18	303.3a	Equipment List		Bus Service	P	
19	304.2	Request for Approval of Construction Contract award		Supt.	3	
20	304.4	Transmittal of Agreement Between Owner and Contractor (including agreement document)		Supt.	P	
21	304.4a	Performance Bond		Supt.	P	
22	304.5	Request for Microfilming of Construction Documents		Logistical	3	
23	305.1	Change Order Submission and Illustration		Logistical	P	
24	306.2	Qtrly Schedule of Cash needs & Attachments A,B,C,D		Finance	3	
25	306.3	School Construction Monthly Financial Report		Finance	UA	
26	307.1	Related Contrs Exceed \$5000		Supt.	P	
27	308.6	Summary Supporting Request for Final Payment		Logistical	P	
28	501.1	Request for Disp. of Property		Supt.	6	
29		LEA Correspondence Supportive of above records		Logistical	***	
		* Beyond date of completion and acceptance of bldg.		*** Retention period to correspond with retention period prescribed for forms & attachments thereto.		
		** May be linens, copies, or film records. "As Built" drawings may be substituted.				

RECORDS RETENTION SCHEDULE NUMBER _____
Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance (cont.)

Section: Food Services

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		Addendum to School Breakfast Program Application		Food Services	3	3
2		Addendum to Special Milk Program Application		Food Services	3	3
3		Quick Reporting System Commodity Only Schools		Food Services	3	3
4		Nonfood Assistance Application – Claim SFSP C		Food Services	3	3
5		Admin. Review Report – Special Food Services Program		Food Services	3	3
6		School Breakfast Program Agreement (public schools)		Food Services	P	P
7		School Breakfast Program Application		Food Services	3	3
8		School Breakfast Program Schedule A		Food Services	3	3
9		Claim for Reimbursement – School Breakfast Program		Food Services	3	3
10		Special School Milk Program Agreement (public schools)		Food Services	P	P
11		Schedule A of Special Milk Program		Food Services	3	3
12		Nonfood Assistance Program Agreement		Food Services	P	P
13		Nonfood Assistance Application Claim		Food Services	3	3
14		Administrative Review Report – School Food Services Program		Food Services	3	3
15		National School Lunch Program Agreement (public schools)		Food Services	P	P
16		National School Lunch Program Application (Type A Lunch)		Food Services	3	3
17		Schedule A of Program School Lunch		Food Services	3	3
18		Claim for Reimbursement National School Lunch and Special Milk Program		Food Services	3	3

PART ONE

Index No. 1.1.B

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance (cont.)
 Section: Food Services (cont.)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
19		Supplemental Claim of Reimbursement Information—"Quick Reporting System"		Food Services	3	3

RECORDS RETENTION SCHEDULE NUMBER _____
Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance (cont.)

Section: Safety and Transportation

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
<u>Pupil Transportation Reports</u>						
1	T-4	Physical Exam of Maryland School Bus Drivers		Trans.	Duration of Employment	
2		Maryland School Bus Acceptance Check		Trans.	10	L + (10)
3	T-1	Request for Approval of Change in Public School Transportation Contract		Trans.	5	P
4	T-2	Request for Approval of Change in Public School Transportation Contract		Trans.	5	P
<u>Driver Education Reports</u>						
5		Driver Education Certificate Register		Supervisor Central Off.	P	P-at-School
6		Request for Driver Education Certificates		Supervisor Central Off.	2 (NR)	No
7	015-28	Driver Education Program Report – School Year		Supervisor Central Off.	3	No
8	015-20	Driver Education Program Report – Summer School		Supervisor Central Off.	3	No
9	015-27	Driver Education Program Report – After School		Supervisor Central Off.	3	No
10		Request for Driver Education Instructor's Cards		Supervisor Central Off.	3	No
10a		a. previously certificated		Supervisor Central Off.	3	No
10b		b. not previously certificated		Supervisor Central Off.	3	No

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance (cont.)
 Section: Budget and Fiscal Planning

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	015-32	Certificated Staff Report (Control Sheet)		Personnel	3	
2	015-1	Aid to Education State Aid for Current Expense (Calculation of State Aid and Worksheets)			NR	
3	015-4	Statement of Distribution of State Aid		Bus. Services	NR	
4	015-6	Pupil Enrollment		Pupil Serv.	NR	
5	015-7	Public School Professional Staff Budget Estimates		Budget	3	
6	015-8	Pupil Transportation		Transportation	3	
7	015-9	Local Funds for Public E&S Schools in Maryland		Bus. Serv.	3	
8	015-10	Handicapped Child -- Budget Estimates		Pupil Serv.	3	
9	015-11	Teaching Assign. in Evening H.S.		Adult Ed.	3	
10	015-12	Pupil Enrollment in Evening H.S.		Adult Ed.	3	
11	015-13	Construction Distribution Statement			NR	
12	015-17	Operating Costs of Severely Handicapped Child in Special Public Day-School Program		Pupil Serv.	3	
13	015-18	Request for State Aid for Home Instruction		Pupil Serv.	3	
14	015-19	Request for Appropriation of State Aid for Handicapped Child. in Non-public Schools		Pupil Serv.	3	
15	015-20	Driver Education Summer Program High School Pupils		Supervisor Central Off	3	
16	015-30	Request for State Aid for Hospital Instruction		Pupil Serv.	3	
17	015-31	Request for State Aid for Handicapped Child. Non-public Schools (Excess Cost Cases)		Pupil Services	3	
18	015-22	Library Certification -- Current Expenses		I.M.C.	3	
19	015-23	Summary of IBM List of Handicapped Pupils in Non-public Schools		Pupil Serv.	3	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance (cont.)
 Division: Budget and Fiscal Planning (cont.)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
20	015-25	Sending Units Report on Tuition (Inter-County Transfers - Report of Tuition [R])		Pupil Ser.	3	
21	015-26	Tuition Report [S]		Pupil Serv.	3	
22	015-27	Driver Education Public H.S. Pupils - Out of School Hours		Supervisor Central Off	3	
23	015-28	Driver Education Public H.S. Pupils - During School Hours		Supervisor Central Off	3	
24	015-29	Driver Education Public H.S. Pupils - Combined, Out of School and During School Hours		Supervisor Central Off	3	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance (cont.)
 Section: Accounting

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	Form DVE	Div. of Voc.-Tech. Ed. Annual Financial Report		Voc. Ed. Sup.	5	
2		NDEA Act Title III		Fed. Prog.	5	
3	AGE-R-1	Request for Reimbursements of State Fund for Adult General Education		Adult Ed. Sup.	5	
4	ABE-2	Request for Reimbursement		Business Services	5	
5	MDTA-SRI	Manpower Development & Training Act - Request for Funds and Financial Status Report		Fed. Prog.	5	
6	10-DLE	ESEA Title II - Project Financial Status Report		Finance	5	
7	ESI-10	ESEA Title I - Project Financial Status Report		Finance	5	
8	ESEA-6	ESEA Title VI - Project Financial Status Report		Finance	5	
9	NYC-9	NYC Sponsor's Activity Report		Fed. Prog.	5	
10	BWP-24	Sponsor's Invoice		Fed. Prog.	5	
11	BWP-25	Sponsor's Detailed Statement of Costs		Fed. Prog.	5	
12	AF-123	Certificate of Project Expenditures		Fed. Prog.	5	
13		Proposed Budget Summary of Expenditure Report		Fed. Prog.	5	
14	AF 97-2	Equipment Inventory (Adult Basic Education)		Adult Ed.	5	
15	DVE 420A	Application for Approval of Vocational Education PGMS		Voc. Ed.	5	
16	DVE 303	Equipment Inventory Vocational & Technical Education		Data Process	5	
17		Div. of Voc.-Tech. Ed. Qtrly Progress Report		Finance	5	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Administration and Finance (cont.)
 tion: Accounting (cont.)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
18	AF/71	Claim for Reimbursement (National School Lunch Program)		Lunch	5	
19	AF-NYC-270	Confirmation Sheet		Fed. Prog.	5	
20	AF-NYC	County Director Budget		Fed. Prog.	5	
21	ESEA III 30-3	Qtrly Estimated Requirement and/or Report of Disbursement Title III ESEA Cash		Finance	5	Fed. Prog.
22	AF-011-01	Request for reimbursement school community centers program		Fed. Prog.	5	
23		Notification of Grant Award ESEA Title III		Finance	5	Fed. Prog.

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Certification and Accreditation
 Office: Office of Certification

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	CA-C-19	Recommendation Form		Personnel	3	
2		Workshop Approval Form		Personnel	3	
3		Evaluation for Certification – Guidance Counselor – 617:514		Personnel	P	
4		Evaluation for Certification – Home Economics – 617:69		Personnel	P	
5		Evaluation for Certification – Secondary Academic Subjects – 617:21		Personnel	P	
6		Evaluation for Certification – Elementary or Early Childhood Education – 617:41 and 42		Personnel	P	
7		Evaluation for Certification – Music (secondary) – 617:58 (a)		Personnel	P	
8		Evaluation for Certification – Music (elementary school) – 617:58 (b & c)		Personnel	P	
9		Evaluation for Certification – General Form		Personnel	P	
10		Evaluation for Certification – Physical Education – 617:511 (a) (secondary)		Personnel	P	
11		Evaluation for Certification – Physical Education – 617:511 (b & c) (elementary)		Personnel	P	
12	CA-C25	Reinstatement Letter		Personnel	P	
13	CA-C-33	Recent Credit Letter		Personnel	P	
14		Evaluation for Certification – Art – (elementary school) 617:51 (a)		Personnel	P	
15		Evaluation for Certification – Art – (secondary school) 617:51 (a)		Personnel	P	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Certification and Accreditation (cont.)
 Section: Office of Certification (cont.)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
16		Evaluation for Certification – Business Education – 617:63		Personnel	P	
17		Evaluation for Certification – Driver Education – 617:53		Personnel	P	
18		Evaluation for Certification – Industrial Arts (secondary) 617:55		Personnel	P	
19		Evaluation for Certification – Agriculture 617:61		Personnel	P	
20		Evaluation for Certification – Business Education Teacher Coordinator 617:64		Personnel	P	
21		Evaluation for Certification – Business Data Processing – 617:65		Personnel	P	
22		Evaluation for Certification – Distributive Education Teacher Coordinator – 617:67		Personnel	P	
23		Evaluation for Certification – Trades and Industry Programs – 617:71		Personnel	P	
24		Evaluation for Certification – Health Education 617:54		Personnel	P	
25		Evaluation for Certification – Reading Teacher – 617:512		Personnel	P	
26		Evaluation for Certification – Pupil Personnel Worker – 617:515		Personnel	P	
27		Evaluation for Certification – Teacher of Handicapped Children – 617:516		Personnel	P	
28		Evaluation for Certification – Reading Specialist – 617:519		Personnel	P	
29		Evaluation for Certification – Psychological Services – 617:5111		Personnel	P	
30		Evaluation for Certification – Supervisors and Principals – 617:12		Personnel	P	

RECORDS RETENTION SCHEDULE NUMBER _____
Records Prescribed by the Maryland State Department of Education

Division: Research, Evaluation, and Information Systems
Section: Statistical Services

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	A & F 015-33	Certificated Staff Currently Employed by Local Unit (Joint report with State Aid unit)	Yes	Personnel	5	
2	REIS 075-26	Summary of All Staff		Personnel	3	
3	REIS 075-31	Number of Professional Staff in Central Office by Assignment, Race, and Sex		Superintendent	3	
4		Weekly Assignments of Professional Staff		Instruction	3	
5		High School Subject Offerings		Instruction	3	
6		Annual Organization Report		Instruction	3	
7	REIS 075-14	Public School Enrollment by Race, Sex, and Single Years of Age		Pupil Services	3	
8	REIS 075-11	Summary of Enrollment, Attendance, & Promotions		P.S.	3	
9	REIS 075-30	Waiver Program for Secondary School Pupils		P.S.	3	
10	REIS 075-21	Opening & Closing Dates of Schools; Number of School Days; Schools Open Less Than 180 Days		P.S.	3	
11	REIS 075-22	Changes in Number of Schools		P.S.	3	
12	REIS 075-9	Miscellaneous School Data			3	
13	REIS 075-10	Summer School Programs			3	
14	REIS 075-15	General Adult Education Programs			3	
15	REIS 075-7	Report on New Construction Completed			3	
16	REIS 075-1	Fall Report on School Housing			3	

RECORDS RETENTION SCHEDULE NUMBER _____
Records Prescribed by the Maryland State Department of Education

Division: Research, Evaluation, and Information Systems (cont.)
 Section: Statistical Services (cont.)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
17	075-200	Annual Budget for Local Boards of Education		Business Services	3	
18	REIS 075-201	Consolidated Annual Finance Report		Business Services	P	
19	REIS 075-2	Summary of Public School Pupils Transported at Public Expense		Trans.	3	3
20	076-200	Summary of Estimated Cost of Transporting Public School Pupils at Public Expense		Trans.	3	P
21	076-201	Summary of Actual Expenditures for Pupil Transportation		Trans.	UA	P
22	076-202	Request for Approval of Change in Transportation Contract		Trans.	UA	P
23	REIS	Maximum Salaries Provided Under Present Salary Schedules for Selected Positions; Salary Schedules of Professional Staff		Personnel	10	
24	CR-1	Achievement and Attendance Record	yes	Schools	P	
25	CR-2	Personal Data Record	yes	Schools	Pupil-Age 21	
26	CR-3	Test Record	yes	Schools	Pupil-Age 21	
27	CR-4	Teacher Observation Record	yes	Schools	Pupil-Age 21	
28	CR-5	Perm. Record, Elem. School	yes	Schools	P	
29	CR-6	Handicapped Child Record	yes	Schools	Pupil-Age 21	
30	CR-7	Vision-Hearing Screening Record	yes	Schools	Pupil-Age 21	
31	CR-8	Pupil's Medical Record Form Private Physician	yes	Schools	Pupil-Age 21	
32	CR-9	Pupil's Health Progress Record	yes	Schools	Pupil-Age 21	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Research, Evaluation, and Information Systems (cont.)

Division: Statistical Services (cont.)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
33		Other Pupil Records Prior to 1957 a) Retain Records Similar to CR-1, and CR-5 Permanently b) Destroy all Other Records Similar to CR-2, CR-3, CR-4, CR-6, CR-7, CR-8, and CR-9	yes	Schools		
34	PDS-1	Personal and Family Information	yes	Schools	P	
35	PDS-2	Subject Performance Information	yes	Schools	P	
36	PDS-3	Standardized Test Information	yes	Schools	Pupil-Age 21	
37	PDS-4	School Enrollment and Non-Subject Performance Information	yes	Schools	Pupil-Age 21	
38	PDS-5	Physical Health Information	yes	Schools	Pupil-Age 21	
39	PDS-6	Health Inventory, Elementary and Secondary	yes	Schools	Pupil-Age 21	
40	PDS-7	Pupil Identification Data for School Year 19	yes	Schools	Pupil-Age 21	
41		Attendance Roll Books, (Teachers' Registers), and other Locally Devised Forms Which Serve the Same Function	yes	Schools	3	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Research, Evaluation, and Information Systems (cont.)
 Section: Educational Research and Evaluation

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	OE Form 4484	U.S. Office of Education – Consolidated Program Information Report		Federal Program	UA	3
2		MSDE – ESEA, Title I Evaluation Report on Summer Term and Regular Term Programs for Low Income Children		Federal Program	UA	3
3		MSDE – ESEA, Title I Evaluation Report on Programs for Migrant Children		Federal Program	UA	3
4	OE Form 2328	Program Reference File – School Report		Federal Program	3	3

RECORDS RETENTION SCHEDULE NUMBER _____
Records Prescribed by the Maryland State Department of Education

Division: Research, Evaluation and Information Systems (cont.)
 Unit: Vocational Education Research Coordinating Unit

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	DVE 522T	MSDE – College Faculty Form			5	
2	DVE 523S	MSDE – Adult Voc. Ed. Student REC			5	
3	DVE 523T	MSDE – Adult Voc. Ed. Teacher REC			5	
4	MSDE 200S	MSDE – High School Graduate Follow-Up Questionnaire		Pupil Services	5	
5	DVE 521S (S-70)	MSDE – Secondary Voc. Ed. Student REC.			5	
6	DVE 521T (S-70)	MSDE – Secondary Voc. Ed. TEAC. REC			5	
7	DVE 522S	MSDE College Student Form			5	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Compensatory, Urban, and Supplementary Programs
 Division: Compensatory Education

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		AVC Daily Attendance of Handicapped Children in Schools Supported by State			P	
2	OE4389-3	Project Summary (Migratory Children)		Finance	P	3
3		Criteria for Demonstrating Comparability		Federal	3	3
4	ESEA Title 1 1 Rev. 72	Application for Grant (Educationally Deprived)		Federal	3	3
5	1-8-70	Project Amendment Application		Finance	P	3
6	10 REV-2/68	Project Financial Statement		Finance	P	3
7		Letter of Acknowledgement		Federal	P	3
8	OE4376-1	Annual Survey of Children in Institution not supported by State		Federal	P	3

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Compensatory, Urban, and Supplementary Programs (cont.)
 Section: Supplementary Centers and Services

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	ESEA III 30-1	Statistical Data ESEA Title III		Finance	P	3
2		OTRLY Est. REQ and/or Report of DISB Title III Cash		Finance	P	3
3	ESEA III 302	Proposed Budget Summary, or Expenditure of Federal Funds		Finance	P	3

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education .

Division: Compensatory, Urban, and Supplementary Programs (cont.)
 Section: National Defense Education Act (NDEA)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		MSDE - NDEA III Financial Status Report		Finance	5	3
2		NDEA Title III Fiscal Report		Finance	5	3
3		NDEA Title III Project Application		Federal	5	3
4		No Name Project Control Slip (Blue 3/4) (Regular)			5	
5		No Name Project Control Slip (Yellow 3/4) (Appalachia)			5	
6		Project Approval Summary		Federal	5	3
7		No Name Project Approval Notification		Federal	5	3
8		Project Evaluation Summary		Federal	5	3
9		Project Acknowledgement Letter		Federal	5	3
10		Project Approval Cover Letter		Finance	5	3

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Instruction

Section: Office of Curriculum Development

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		Development of Black Studies Programs in U.S. History and Modern Public Secondary Schools		Instruction	5	
2		Report on Status of Family Life and Human Development		Instruction	3	
3	Appendix C	Community Centers Program Evaluation		Instruction	5	
4	Form A/F C11-01	Requests for Reimbursement - School Community Centers Program		Instruction	5	
5		Cover - Application Sheet (School Community Centers Program)		Instruction	3	
6		Current Curriculum Materials Developed		Instruction	1 (NR)	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Instruction (cont.)
 Section: Adult Continuing Education

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	ABE-3	Equipment Inventory		Warehouse	5	
2	ABE-2	Request for Reimbursement		Finance	5	
3		Adult Basic Education Annual Program Report		Adult Ed.	3	
4		Adult Basic Education Monthly Activity Report		Adult Ed.	1 (NR)	
5	AGE-R-1	Request for Reimbursement of State Funds for Adult General Education		Finance	3	
6	AGE-E-1	Requests for Encumbrance of State Funds for Adult General Education		Adult Ed.	3	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Instruction (cont.)
 Office: Office of Special Education

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		Annual Report on Speech and Hearing		Pupil Ser.	3	3
2	INSTR 156-23	Summary Request for State Aid for Severely Handicapped Pupils in Nonpublic Schools		Pupil Ser.	3	3
3	INSTR 015-19	Request for Approval of State Aid for Handicapped Children in Nonpublic Schools		Pupil Ser.	3	3
4		Special Aid to Handicapped Children Report of Pupil Progress		Pupil Ser.	3	3
5	INST. 156-1	Summary of Request for Approval of Special Programs for Handicapped Children in Maryland Public Schools		Pupil Ser.	3	3
6	INST. 156-31-771	Request for Approval of State Aid for Handicapped children in Nonpublic Schools (excess cost cases)		Pupil Ser.	3	3
6	A&F Form	Request for Approval of Special PGMS for Handicapped Children in Maryland Nonpublic Schools		Pupil Ser.	3	3
7	Inst. 156-LA	Summary of Resources for Handicapped Children in Md. Public Schools for the School Year 19__ 19__		Pupil Ser.	3	3
8	Inst. 156-14	Request for approval of Special Programs for Handicapped Children in Md. Public Schools for School Year 19__ 19__		Pupil Ser.	3	3

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Instructional Television
 Section: Administrative

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	112470	Reporting from ITV Coordinators in the Viewing Area (Revised Yearly)		ITV Office Bd. of Ed.	1 (NR)	
2		TV Survey, County Superintendents of Schools		ITV Office Bd. of Ed.	3	Supt.'s Office
3		Planning: Evaluating Guidelines Production Flow Model (Being Revised)		ITV Office Bd. of Ed.	3	
4		Superintendent's Survey on Maryland Instructional TV		ITV Office Bd. of Ed.	3	Supt.'s Office
5		Summary of Superintendent's survey on Maryland, Instructional TV		ITV Office Bd. of Ed.	3	Supt.'s Office
6		LEA Correspondence supportive of official records		ITV Office Bd. of Ed.	3	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Instructional Television (cont.)
 Section: Curriculum Development and Utilization

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		ITV Workshops		ITV Office	3M (NR)	
2		Payment Request (subtitle)		Bd. of Ed.	3	Finance
3		Teacher's Manual Request (revised yearly, supports financial expenditure)		ITV Office	3	
4		ITV Coordinator Listing (revised yearly)		Bd. of Ed.	1 (NR)	
5		ITV Coordinator Response Sheet Revised		ITV Office	1 (NR)	
6		LEA correspondence supportive of official records		Bd. of Ed.	3	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Library Development and Services

Section: School Media Services

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	NP3-7/71 DLDS	Report of Local Expenditures: Nonpublic Schools Library Resources, Textbooks, Other Instructional Materials			5	
2	P1-7/71 DLDS	Report of Local Expenditures: Public Schools School Library Resources, Textbooks, Other Instructional Materials		Division of Admin- istrative Services	5	
3	P2-9/71	Application for ESEA Title II Funds- Public Schools		Federal Programs Department	5	
4	NP2-9/71 DLDS	Application for Loan of Materials Under ESEA Title II - Nonpublic Schools			5	
5	P8-11/71 DLDS	ESEA Title II Project Approval- Public Schools		Federal Programs Department	5	
6	NP7-11/71 DLDS	ESEA Title II Application Approval- Nonpublic Schools			5	
7	6a 12/68 DLE	Certifications - Public Schools		Division of Personnel	5	
8	6b 12/68 DLE	Certifications - Nonpublic Schools			5	
9	P4-7/71	ESEA Title II Project Financial Status Report (submitted quarterly)		Finance Department	5	
10	P9-3/72 DLDS	Annual Library-Media Center Report- Public Schools		IMC	P	
11	NP9-7/73 DLDS	Annual Library-Media Center Report- Private Schools			P	
12	HEW-441 (12-64)	Assurance of Compliance with the Department of Health, and Welfare Regulations Under Title VI of the Civil Rights Act of 1964		Federal Programs Department	P	
13	HEW 44 441-C (Rev. 2/67)	Assurance of Compliance with the Department of Health, and Welfare Regulations Under Title VI of the Civil Rights Act of 1964 for Agencies, Institutions and Organizations which are not Direct Recipients of Federal Financial Assistance			P	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Vocational-Technical Education
 Section: Program Planning Unit

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	DVE 3140	Annual Descriptive Report of Program Activities for Vocational Education		Voc. Supv.	3 (UA)	5 yrs.
2		Annual Financial Report		Finance	3 (UA)	
3		Quarterly Progress Reports		Finance	3 (UA)	
4	DVE 303	Equipment Inventory		Voc. Supv.	Until Value of Equipment Drops Below \$200.00	
5	DVE 540	Placement & Program Completions Vocational Technical Programs		Voc. Supv.	3 (UA)	5 yrs.
6	DVE 420 S	Summary Total Vocational Technical Education Budget – Agency-wide		Voc. Supv. Finance	3 (UA)	5 yrs.
7	DVE 420 P	Summary of Program Area Budget Vocational Technical Education Agency-wide		Voc. Supv. Finance	3 (UA)	5 yrs.
8	DVE 430 L's	Budget Details of Annual Plan: Individual School – All Programs		Voc. Supv.	3 (UA)	5 yrs.
9	DVE 300 D	Local Agency – Annual Plan		Voc. Supv.	3 (UA)	5 yrs.
10	DVE 205	Local Agency Long-Range Plan		Voc. Supv.	3 (UA)	5 yrs.
11	DVE 420 A	Application for Approv., Voc. Ed. Programs under Amend. of 1968 p. 1. 90-576 & Maryland State Plan for Vocational Education		Voc. Supv.	3 (UA)	5 yrs.
12	DB 320A	Preliminary Application (Research Trng. Pilot Demonstration Projects)		Voc. Supv.	3 (UA)	5 yrs.
13	310 NP	Proposal for Approval of Vocational-Technical Education Program		Voc. Supv.	3 (UA)	5 yrs.
14	DVE 250	Application by LEA to Participate in Work-Study Program		Voc. Supv.	3 (UA)	5 yrs.
15	DVE 330 A	Preliminary Application (Exemplary Projects)		Voc. Supv.	3 (UA)	5 yrs.
16	DVE 251	Agreement to Participate in Work-Study Program		Voc. Supv.	3 (UA)	5 yrs.

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Vocational-Technical Education (cont.)

Section: Program Planning Unit (cont.)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
17		Graduate Follow-up Report		Pupil Ser.	3 (UA)	
18		Official correspondence supportive of the above		Pupil Ser.	3 (UA)	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Vocational-Technical Education (cont.)
 Section: Vocational Facilities and Equipment Unit

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1	DVE 210 211, 212, 213, 214	Construction Application		Logistical	3 (UA)	
2	DVE 215	Applicant's Quarterly Compliance Report			3 (UA)	
3	A & 1 2 3	Certificate of Expenditure		Finance	3 (UA)	
4	DVE 1	Resolution			3 (UA)	

RECORDS RETENTION SCHEDULE NUMBER _____
 Records Prescribed by the Maryland State Department of Education

Division: Vocational-Technical Education (cont.)

Section: Program Planning Unit

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		Cooperative Prog.'s Wage and Hour Report		Finance	3 (UA)	
2		Agric. Teacher's Schedule		Voc. Ed.	• 3 (UA)	

RECORDS RETENTION AND DISPOSITION SCHEDULE

PART II

RECORDS PRESCRIBED BY THE FREDERICK COUNTY SYSTEM

RECORD RETENTION AND DISPOSITION SCHEDULE

Frederick County has prescribed its own retention and disposition schedule for locally devised reports and other records. A retention period has been assigned in accordance with applicable laws and guidelines. The following initial schedule, and subsequent schedules updated on an annual basis, should be filed biennially with the Assistant State Superintendent, Division of Research, Evaluation, and Information Systems, Maryland State Department of Education.

ABBREVIATIONS:

- DE - Duration of employment
- L+ - Life of equipment + _____ years
- NR - Nonrecord
- UA - Three years or until audited, whichever is later
- US - Until superseded
- P - Permanent

CONTRACT

The ordinary period of limitations for suit on a contract is three years. If the contract is under seal (which usually means only the word "SEAL" added in parentheses after the signatures) the statute of limitations is twelve years.

RECORDS RETENTION AND DISPOSITION SCHEDULE

PART II

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PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

on: Administration and Finance
Office: Budget

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Budget Amendment-Current Expense Fund		Budget Off.	3 yrs.	
2	A-49 (1971)	Budget Amendment- School Construction		Budget Off.	3 yrs.	
3	A-54	Budget Transfer		Budget Off.	3 yrs.	
4	A-36 (1964)	Budget Requests		Budget Off.	3 yrs.	
5		Budget Allocations		Budget Off.	3 yrs.	
6		Annual Budget		Budget Off.	Perm.	
7		Cost Center Report-Monthly		Schools	3 yrs.	
8		Department Report -Monthly		Departments	3 yrs.	
9	A-52 (1974)	Current Expense Fund - Over Expenditure Acknowledgement		Budget Off.	3 yrs.	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local RecordsDivision: Administration and Finance
Office: Finance

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Receipts Log		Accounting	5	
2		Remittance to Bd. of Ed. pink copy of invoice		Accounting	5	
3		Itinerary & statement of mileage		Accounting	5	Local Off.
4	A-3	Expense Sheet		Voucher File	5	1
5		Petty Cash Receipt		Voucher File	5	
6		Disbursement Voucher		Voucher File	5	
7		Bank Statements		Accounting	5	
8		Deposit Slips		Accounting	5	
9		Check - Cancelled		Accounting	5	
10		Check Register		Accounting	5	
11		Purchase Orders (yellow)		Voucher File	5	
12		Purchase Orders (pink)		Accounting	UA	
13		Vouchers		Voucher File	5	
14		Invoices		Voucher File	5	
15		General Ledgers		Accounting	P	
16		Distribution reconciliation		Accounting	5	
17		Cash receipts and disbursements journals		Accounting	5	
18		General Journal		Accounting	P	
19		Exception register (absence report)		Payroll	5	
20	F-7	Report of employee change		Payroll	5	
21	F-47	Time report		Payroll	5	
22	T-3	Field Trip report		Payroll	5	
23	DP-11	Personnel Information report		Payroll	DE	
24		Payroll journals		Payroll	P	
25	941A	Quarterly report		Payroll	P	
26		Deduction register		Payroll	5	
27		Cafeteria Daily Report		Accounting	5	
28		Warehouse Requisitions		Accounting	P	
29		Accounts Receivable Journal		Accounting	P	
30		Accounts Payable Journal		Accounting	P	
31		Restricted Projects - Budgets		Accounting	P	
32		Budget Transfer Requests		Accounting	UA	
33		Auditors' reports		Accounting	P	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records,

Division: Administration and Finance
Office: Food Services

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Absence Report		Payroll	3	
2		Purchased Food & Vegetable Inventory		Food Serv.	3	
3		Payroll Report, Special Functions		Payroll	3	
		Special Function Billing		Finance	3	
5		Special Function Request		Adm.	NR	
6		Special Function Agreement		Adm.	3	
7		Employee Time Schedule Information Sheet		Food Serv.	NR	
8		Employee Information Sheet		Food Serv.	P	
9		Mileage Report		Finance	3	
10		Inventory of Food Supplies		Food Serv.	3	
11		Paper and Soft Goods Inventory		Food Serv.	3	
12		Cleaning Supplies Inventory		Food Serv.	3	
13		Direct Distribution Commodity Inventory		Food Serv.	UA	
14		Direct Distribution Receipt Record		Food Serv.	UA	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Administration and Finance
Office: Food Services

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
15		School Lunch Food Order Form		Food Serv.	3	
16		Paper Supply Order		Food Serv.	3	
17		Soft Goods Order		Food Serv.	3	
18		Inventory Worksheet		Food Serv.	NR	
19		Transfer of Commodities		Food Serv.	3	
20		Milk Report		Food Serv.	NR	
21		School Serving Lunches		Food Serv.	NR	
22		Numerical Checklist of Schools		Food Serv.	NR	
23		Alphabetical List of Cooking Schools		Food Serv.	3	
24		Cafeteria Daily Operating Report		Finance	3	
25		Physical Inventory Report		Food Serv.	3	
26		Cashier's Daily Report		Accounting	3	
27		Receipts		Accounting	3	
28		Checks		Accounting	3	
29		Bank Statements and Reconciliations		Accounting	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Administration and Finance
Office: Food Services

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
30		Deposit Slips		Accounting	3	
40		Invoices and Check Vouchers		Accounting	3	
41		Journals and Ledgers		Accounting	P	
42		Purchase Orders		Finance	3	
43		Check Register		Finance	3	
44		Profit and Loss Statements		Accounting	3	
45		USDA Food Distribution		Food Serv.	UA	
46		Delivery Tickets USDA Food		Food Serv.	UA	
47		Health Department Inspection Letters		Schools	3	
48		Drawings of Cafeterias		Annex	P	
49		Equipment Inventory Cards		Food Serv.	L+3	
50		School Lunch Ticket Worksheet		Accounting	3	
51		Lunch Ticket Inventory		Accounting	3	
52		Application for Cafeteria Work		Food Serv.	5	
53		Medical Examination Certificate		Food Serv.	3	
54		School Lunch Worksheet		Food Serv.	NR	
55		School Breakfast Worksheet		Food Serv.	NR	
56		Request for Life Insurance		Finance	P	
57		Application - Group Ins.		Finance	P	
58		Personnel Action		Food Serv.	P	
59		Requests for Small Equip.		Food Serv.	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Administration and Finance
ce: Personnel

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	DP-11	P. I. F.	yes	Personnel	P	US
2		Contract		"	P	DE
3	INS-6W	Applications for Professional Employment		"	3	
4		Former Employees Personnel Folder	yes	"	P (Microfilmed)	
5		General Correspondence		"	3	
6	P-45	Application for Office Position	yes	"	3	
7	P-44	Clerical Performance Review	yes	"	P	
8	P-14	Activity Compensation Assignment Letter		"	3	
9	P-15	Activity Compensation Time Sheet		"	NR	
10	P-16	Personnel Action Form		"	NR	
11	P-16	Teacher Reference Form	yes	"	DE	
12		White & Yellow Course Approval Form	no	"	P	
13		Annual Personnel Report	no	"	3	
14		Application Form-Logistics	yes	Annex	3	
15		Application Form-Cafeteria	yes	Sch. Lunch Office	3	
16		Application Form-Data Proc.	yes	Personnel	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records:

Division: Administration and Finance
Office: Purchasing

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	A-43 A-44	Requisition Form - Green " " - White			3 yrs. 3 yrs.	
2	A-39	Annual Requisition/Bid List			3 yrs.	
3		Purchase Order			6 yrs.	
4		Bids			3 yrs.	
5		New School Equipment List			3 yrs.	
6		Quotations			3 yrs.	
7	A-46	Salesman Pass Card			3 yrs.	
8	A-47	Application for Placement on Bidder's List			3 yrs.	
9		Purchase Order Expediter			3 yrs.	
10		Bid Tabulations			3 yrs.	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Assistant Superintendent
for Instruction

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Evaluation of School Principal	*	Personnel File	P	
2		Evaluation of Supervisor	*	Personnel File	P	
3		Guidelines for Open Campus Program - application		School	3	
4	INS-23	Jr.-Sr. High School Book Inventory Sheets		Supervisor	3	
5	INS-56	B Program of Study for Sixty-Hour Program		Personnel File	5	
6		Record of Attendance at Meeting or Conference		Office of Asst. Supt.	3	
7		Student Progress Report (Interim)		School	3	
8		Student Progress Report (Report Card)		School	3	
9		Supervisors Monthly Report		Office of Asst. Supt.	3	
10		Teacher Observation Evaluation	*	Personnel File	P	
11		Workshop Request Form		Office of Asst. Supt.	3	
12		Graduation List		Office of Asst. Supt.	P	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____

for Local Records

Division
ofInstruction
Director of Elementary Education

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Educational Specifications		Dir. Office	P	
2		Interim Report to Parents		School	3	
3		New & Additional Equip. List		Dir. Office	US	
4		Parent-Teacher Conference Form-Printed here		School	NR	
5		Reporting System for Elementary Schools (Report Card)		School	P	
6		State Annual Organizational Report		Dir. Office	3	
7		Elementary Book Inventory		Dir. Office	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Adult Education

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Adult Education Student Registration Card		Adult Ed.	P	
2		Adult Education Receipt		Adult Ed.	3	
3		Adult Education Teacher Application		Adult Ed.	3	
4		Adult Education Schedule		Adult Ed.	5	
5		Adult Education Advertisements		Adult Ed.	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Of Art

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Art Experience Record (Min. Standards & 5th and 6th grades)		School	P	
2		7th grade art record		School	3	
3		8th grade art record		School	3	
4		Art Foundations Program		School	3	
5		Art Independent Contract		School	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Driver Education

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Board of Education/ Dealer Agreement		Supervisor Central Off.	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Federal Programs

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Listing of Identified Title I Children		Federal Programs	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local RecordsDivision: Instruction
Home Economics

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Equipment & Supplies Inv.		Supervisor	P	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Instructional Materials Center

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Materials Circulation Records for IMC		Office of Supervisor of Instructional Materials Centers	5	
2		Record of Allocations to School Media Center from 02-03-04-48-00-0200		Budget	5	
3		Record of Materials Delivered by Montgomery County Processing Center to School Media Centers		Office of Supervisor of Instructional Materials Centers	3	
4		Records of Purchases Made Under Codes: 02-03-04-48-00-0200 02-02-60-48-00-0200 02-03-10-48-00-0200 02-03-17-48-00-0200 02-04-01-48-00-0200 02-04-16-48-00-0200 02-05-20-48-00-0200 02-05-40-48-00-0200 02-04-02-48-00-0200		Purchasing	5	
5	B-73	Tentative Budgets Prepared by Media Centers		Budget	3	
6		Internal Dept. Reports		Office of Supervisor of Instructional Materials Centers	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Instructional Materials Center

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
7		Inventory Records for IMC		Office of Supervisor of Instructional Materials Centers	6	
8	INS-59 Rev. 71	Materials Requests		Office of Supervisor of Instructional Materials Centers	3	
9	INS-9 Rev. 71	Film Booking Sheets		Office of Supervisor of Instructional Materials Centers	3	
10		Receipts Log		Finance	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Instructional Television; In-Service Meetings; Cultural Programs; Student Council

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	(LEA) LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	(OPT. LEA) RETENTION EXTRA COPIES (Years)
1		School Communication Memos		office file	3	
2		Programs		office file	3	
3		Meetings (schedules)		office file	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Off: Kindergarten

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Elementary Kindergarten Report card		School	P	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
 e: Mathematics (Elementary and High)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		<u>Elementary</u> - Math progress check list		School	3	
2		<u>High School</u> IMS Progress Report - Levels II-IX		Office	3	
3		IMS Progress Report - Level X		Office	3	
4		Student Profile Sheet Algebra I and II		Office	3	
5		Student Profile Sheet Geometry		Office	3	
6		IMS Supplemental Progress Report - Level II-IX		Office	3	
7		IMS Supplemental Progress Report - Level X		Office	3	
8		Algebra II - Skill Sheet		Office	3	
9		Multi-Media Geometry - Skill Sheet		Office	3	
10		Algebra I - Skill Sheet		Office	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local RecordsDivision: Instruction
0 Music

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Form letters to parents-4		Office	3	
2		Special order forms		Office	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Physical Education

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Parent permission swimming letters		Office	3	
2		Medical evaluation student forms		Office	3	
3		Eligibility forms		Office	3	
4		Contracts for Inter-scholastic sport events		Office	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Of: Reading

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Summary Sheet of Sixth Year Terminal Testing (Reading) Form I (Individual)	X	School	6	
2		Summary Sheet of Sixth Year Terminal Testing (Reading) Form II (School)	X	School & Supervisor	6	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division of Instruction
School Offices

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Discipline Records	X	School	3	
2		Student Insurance files		School	3	
3		Equipment & Supplies Inventory		School	US	
4		Keys, Locks, Lockers		School	US	
5		Pupil Emergency data		School	3	
6		Transportation Information Students-Bus number-driver		School	3	
7		Permission slips-field trips, sports programs, psychological slips		School	3	
8		Student location-pin up map		School	3	
9		Accreditation		School	US	
10		Students available free lunch	X	School	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Of: Elementary Science

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Greentop Parent Permission Forms		Office	3	
2		Mar-Lu-Ridge Parent Permission Forms		Office	3	
3		Counselor permission forms		Office	3	
4		Special order forms- Science		Office	3	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division Instruction
011 Social Studies (High) and (Elementary)

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		High: Family Life & Human Development:		Office	3	
2		Local committee evaluation form		Office	3	
3		Teachers' Progress Report		Office	3	
4		Parent Permission Forms		Office	3	
5		Secondary: Skill Sheets (Progress Report for Students)		Office	3	
6		Elementary: Minimum Standards		School	P	

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Instruction
Office: Testing

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	TS-1	Test Service Request Form		Testing Office	3	
2		Inventory of Tests in School		Test'g Off	3	
3		Evaluative Design		Test'g Off	3	
4		Min. Standards Report		School	P	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Transportation
Office: Transportation Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		AAA Safety Patrol Materials		Trans.	3	
2		Acceptance Check New Busses		Trans.	L + 10	
3		Accident Reports		Trans.	6	
4		Administrative SOP		Trans.	P	
5		Applications, Employment		Trans.	5	
6		Automobile Assignment		Trans.	3	
8		Bridge Survey, Annual		Trans.	3	
9		Bus List, Numerical		Trans.	3	
10		Bus Assignment Roster		Trans.	3	
11		Bus Inspection Schedule		Trans.	3	
12		Calendar, School		Trans.	3	
13		Circular Letters		Trans.	3	
14		Contract Bus List, Numerical		Trans.	3	
15		Contractor's, Bus Roster		Trans.	3	
16		Contract Certification		Trans.	L + 10	
19		Emergency Procedures		Trans.	P	
20		Evaluation, Personnel		Trans.	DE	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Transportation
 Office: Transportation Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
22		Insurance Quarterly Report, Vehicles		Admin.	3	Trans. 3
23		Maintenance Records School Busses		Trans.	L + 10	
24		Payroll - Bus Drivers		Finance	6	Trans. 6
25		Physical Exams. Bus Drivers		Trans.	6	
26		Policies - Trans. LEA		Admin.	P	Trans. P
27		Policies - Trans. State Dept. of Education		Trans.	P	
28		Pupil Referral Reports		Trans.	3	
		Preventive Maint. Report School Busses		Trans.	L +	
30		Parochial - Nonpublic School Trans. Data		Trans.	US	
31		Railroad Crossing Survey, Annual		Trans.	3	
32		Route Descriptions & Maps, School Busses		Trans.	US	
33		School Bus Manifest Monthly Report		Trans.	UA - 3	
34		School Bus, October Report		Trans.	UA - 3	
35		Specs. MVA School Busses		Trans.	US	
36		Specs. State Dept. of Ed. School Busses		Trans.	US	
37		Survey - One (1) Mile Walking Area		Trans.	US	

PART TWO

A RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Transportation
Office: Transportation Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
38		Supervisors Handbook State Department of Ed., Trans.		Trans.	US	
39		Requisitions, Office Copy		Trans.	UA (3)	
40		Substitute Driver Roster		Trans.	P	
41		Telephone Log		Trans.	NR	
43		Training Programs Bus Drivers		Trans.	NR	
44	076-200 -201 -202	Transportation Reports State Dept. of Education		Trans.	P	
45		Vehicle Monthly Expense Reports LEA (Brown Env.)		Trans.	L +	
46		Workmen's Compensation Insurance, Contract Bus Operators Report		Trans.	UA	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Pupil Services
Office: Pupil Personnel

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	43-60	Monthly Report, Relay Sessions and Temporary Quarters		Bd. of Ed.	3	
2	43-700	Pupil Parent Survey Questionnaire PL 874		P.S.	3	
3	43-705	Request for School Records		School	3	
4	43-706	School Record in Lieu of Birth Certificate		P.S.	P	
5	43-708	First Day Enrollment		P.S.	NR	
6	43-710	Number of Pupils Eligible for Transportation		P.S.	3	
7		Number Belonging by Grade Report		P.S.	P	P
8		Lists of Graduates		Asst. Supt.	P	P
		Psychological and Health Services:				
9		School Accident Report Form		School Off	3	
10		Psychological Reports and Permission Forms	X	Pupil Serv.	Destroy when student's class graduates from school.	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Plant Operations
Office: Operations Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	D.P. 11	Personnel Information Form		Operations	P.	
2	F-47 1969	Time Sheets-hourly & Overtime		Finance	5	3
3		Exception Register Absence Report		Finance	6	1
4	D.P. 11	Personnel Information Payroll Change		Oper.	6	
5	D.P. 11	Personnel Information Change of Status, Notices of Separation & Appointments-Salary changes & Transfers		Operations	6	
6	JE	Job Applications		Oper.	3	
8	B1&B2 1973	Budget Request		Operations	3	
9	A37	Final Budget		Operations	6	
10		Personnel Notices		Operations	3	
11	A-54 1972	Budget Transfer Request		Operations	3	
13	110	Warehouse Requisitions		Finance	3	Local Off

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local RecordsDivision: Plant Operations
Office: Operations Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
14	NA	Evaluation Reports on Personnel	C	Annex	P	U.T.

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local RecordsDivision: Plant Operations
Office: Warehouse

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1	W108	Delivery Slip		Warehouse	3	-
2	A44	Purchase Requisition		Finance	3	1
3	A43	Purchase Requisition		Finance	3	1
4	W11D	Warehouse Requisition		Finance	3	1
5	--	Property Accountability		Data Serv.	P	P
6	--	Equipment Transfer		*Warehouse	P	1
7	--	Courier Trip Ticket		Warehouse	3	1
8	W104	Receiving Slip		Warehouse	3	1
9	W109	Equipment Malfunction		Warehouse	3	1
10	M4-1969	Tally Sheet Electronics Repair		Warehouse	3	1
11	--	Delivery Sheet		Warehouse	NR	NR
12	--	Truck Route		Warehouse	NR	NR
15	W101	Inventory Cards		Warehouse	6	--

* Subject to change to Data Services

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Maintenance of Plant
Office: Maintenance Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
1		Annual Vandalism Report		Maintenance	3	
2	7059	Attendance Register		"	3	
4	M-2 1969	Fire Drill Report		Maint.	3	
8	N/A	Policies		Maint.	US	
9	A-54 1972	Budget Transfer Request		Finance	6	
10	N/A	Boiler Record		Maint.	L+3	
11	N/A	Board Reports		Maint.	3	
12	B-3 1973	Budget Request Form		Maint.	3	
13	M-001 1973	Work Order Request		Maint.	3	
14	N/A	Employee Record Form		Maint.	DE	
16	N/A	Vendor Record		Purchas. Maint.	3	
17	M-1-69	Work Order Record		Maint.	3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Maintenance of Plant
Office: Maintenance Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
18	A37-1970	Budget Allocation Book		Maint.	3	
19	N/A	Budget Book		Maint.	3	
21	N/A	Job Applications		Maint.	3	
23	N/A	Quotes		Maint. & Purchas.	3	
24	N/A	Fire Marshal Report		Maint.	6	
25	N/A	Health Report		Maint.	3	
26	N/A	Maintenance Inventory		Maint.	US	
27	N/A	Painting Report		Maint.	3	
28		Painting Schedule		Maint.	3	
29		Roof Bonds		Maint.	L+3	
31	A-36 1964	Budget Request Forms		Maint.	3	
32	M-6 1971	Personnel Data Form		Maint.	DE	
33	M-9 1973	Maintenance Travel Log		Maint.	3	
34	M-7 1972	Employees Overtime Report		Maint.	3	

PART TWO

A RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Maintenance of Plant
 Maintenance Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
35	N/A	Maintenance Time Record		Maint.	3	
36	M-5 1970	Open Purchase Order Account Sheet		Maint.	3	
38	A-43 1968	Requisitions		Purchas.	3	
39	A-2 1967	Golden Rod Purchase Order		Maintenance	3	
40	N/A	Receipt Log		Maint.	3	
44	703 (AEL)	Electrical Inspection Certificates		Maint.	L+3	
45	F72129	Fire Control System Inspect. Cert.		Maint.	L+3	
46	CW 67535B	Boiler Inspection Certificates Warranties		Maint.	L+3	
47	EPA Form 7550-0 REV. 5/73	Sewage Permit		Maint.	L+3	
48		Insurance Inspection Report		Maint	L+3	

PART TWO

A. RECORDS RETENTION SCHEDULE NUMBER _____
for Local Records

Division: Maintenance of Plant
Office: Maintenance Department

ITEM NUMBER	FORM NUMBER	RECORD TITLE OR DESCRIPTION	CONFIDENTIAL	LOCATION OF RECORD COPY	RETENTION PERIOD (Years)	RETENTION EXTRA COPIES (Years)
50	N/A	Principal Request Summer Maintenance		Maint.	3	