

Records Management

November 10, 2014

NOTE: Please refer to the information and attachments provided to you via email regarding the fall Records Roundup for more detailed information regarding the steps to take to prepare documents for destruction.

In general, if the original file/documents are maintained by another department, then duplicates can be destroyed through the District Records Roundup. When you prepare the Destruction Certificate, include the Retention Record number from the retention schedules located on the Pipeline and indicate the documents are "duplicates."

Some more common documents you may want to destroy or prepare for off-site storage include:

HR related paperwork

- FMLA files – GR 1050-54b leave records (fiscal year plus 5 years)
- Para timesheets – GR 1050-56 timesheets (4 years)
- Personnel files - **Must break down by items in file and look up retention record number for each**

Rosters for annual staff development – GR 1050-28d (2 years)

PUF reports - GR 1050-25 (3 years)

Stipend information – GR 1050-55b Payroll records (fiscal year end plus 3 years)

Service Award information – GR 1050-09 (2 years)

Finance related paperwork

- Purchase orders/requisitions – GR 1025-26b (fiscal year end plus 5 years)
- Annual budget information – GR1025-04a (permanent)
- Deposits and anything relating to campus activity funds – SD-3550-01 (fiscal year end plus 3 years)
- Travel requests and paperwork associated – GR 1025-26a (fiscal year end plus 5 years)
- Field trip requests and paper associated – SD 3500-07d (2 years)

CPS visits and associated paperwork – SD 3200-03 (until student age 18)

Free and reduced lunch rosters – SD 3275-02b (5 years)

Building modification paperwork – GR 1075-16a (permanent)

Workers comp claim paperwork – GR 1050-32 (calendar year end plus 5 years)

Grant information/awards – depends on type of grant (state/federal) See GR (All Local Government) retention policy on pipeline.

Question: Assets they said 7 years at our last meeting, but that was for items over \$750. What about things that were less? For example paperwork for a printer that was \$300. – See purchase orders above.

Example: When you look for the retention period for FMLA leave records, ask yourself 2 important questions before destroying any documents:

1. Am I the owner/keeper of the original document? In other words, is someone else expected to maintain the original, and I have a copy; and
2. Has the document met the retention period, or do I need to store it?

*GR1050-54b	LEAVE RECORDS	Requests and authorizations for vacation, compensatory, sick, Family and Medical Leave Act (FMLA), and other types of authorized leave, and supporting documentation.	FE + 5 years for school districts; FE + 3 years for other governments.	By regulation – 29 CFR 825.500
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