

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSF-001	<b>APPROPRIATION LEDGER FILE</b>  Record established to document specific authorizations to make expenditures. It includes expenditures and encumbrances and is further adjusted by any changes in appropriation.	Info and Record Copy	District Office		SUCCESSFUL AUDIT PLUS THREE YEARS	Retain at agency; successful audit plus 3 yrs; destroy.
GSF-002	<b>BUDGET AND BUDGET DATA, WORKSHEETS</b>  <b>A. DEPARTMENTAL</b> Annual departmental requests made to the Budget Office for allocation of operational funds for the upcoming fiscal year.  <b>B. DIVISIONAL/SUB-DIVISIONAL</b> Annual requests made to the department's fiscal office for allocation of operational funds for the upcoming fiscal year.	Info Copy  Record Copy	District Office  Budget Office/ Archives		SUCCESSFUL AUDIT  PERMANENT	Retain at agency; successful audit; destroy.   Retain at agency; successful audit; destroy.
GSF-003	<b>PETTY CASH FUND SYSTEM</b>  Fund containing small amounts of cash kept on hand for immediate cash purchases. Contains an amount estimated to be sufficient for a period of time. To establish fund, a direct claim Payment Voucher (GSF-009) is processed and paid to the petty cash fund from the appropriate fund (general, special, construction fund). Moneys usually deposited in a local bank by the fund custodian; checks are drawn for appropriate purchases. Fund replenishment requires payment voucher payable to the fund and supported by required documentation.					

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<b>GSF-003</b>	<b>PETTY CASH FUND SYSTEM (continued)</b>					
	<b>A. PETTY CASH REQUEST PAYMENT VOUCHERS (PV)</b> Used to request reimbursement for expenditures made from agency's petty cash fund. See GSF-009.	Record Copy	District Office		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.</b>
		Info Copy	Local School/ State Treasurer		<b>SUCCESSFUL AUDIT</b>	
	<b>B. PETTY CASH VOUCHERS</b> Document amounts paid out of petty cash by an agency.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>C. PETTY CASH CHECKBOOKS</b> Checks used for expenditures from petty cash fund.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>D. PETTY CASH STATEMENTS</b> Bank statements for checks drawn against petty cash fund checking account. Should be maintained with appropriate canceled checks.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>

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<b>GSF-003</b> Con't	<b>PETTY CASH FUND SYSTEM</b>					
	<b>E. PETTY CASH RECEIPTS</b> Receipts for moneys received and applied to petty cash fund.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>F. PETTY CASH RECONCILIATIONS</b> Documents reconciling expenditures from petty cash fund with bank account.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
<b>GSF-004</b>	<b>BANK STATEMENTS, CANCELED CHECKS, CHECK STUBS</b>  Statements and canceled checks reflecting status of an agency's bank accounts.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
<b>GSF-005</b>	<b>CASH DISBURSEMENTS JOURNAL</b>  Journals in which individual disbursements are entered. Exists in various forms but is essentially a chronological record containing lists of individual transactions.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
<b>GSF-006</b>	<b>CASH REGISTER TAPES</b>  Tapes used to reconcile sales with cash on hand at end of each day.	Info and Record Copy	District Office/ Local School		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>

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GSF-007	<b>RECEIPTS/RECEIPT BOOKS/LEDGERS</b>  Document receipt of moneys by an agency from clients or customers for fees or services rendered.	Info and Record Copy	District Office/ Local School		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
GSF-008	<b>PURCHASE ORDERS (PO) (REGULAR, OPEN-END, EMERGENCY)</b>  Authorize the delivery of specified merchandise or the rendering of a certain service, showing the amount authorized.	Record Copy  Info Copy	District Office/ Local School  Dept of Finance/ Local School		FIVE YEARS; SUCCESSFUL AUDIT  SUCCESSFUL AUDIT	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.  EXCEPTION: Series GSF-021, Bids.
GSF-009	<b>PAYMENT VOUCHERS (PV) (REGULAR, DIRECT CLAIM)</b>  Requests for payment from a vendor for goods or services in accordance with a properly executed purchase order or contractual agreement.	Record Copy  Info Copy	District Office  Local School/ State Treasurer		FIVE YEARS; SUCCESSFUL AUDIT  SUCCESSFUL AUDIT	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.
GSF-010	<b>INTERGOVERNMENTAL VOUCHERS (IV)</b>  Interdepartmental billing forms used by state agencies to bill other state agencies for goods and/or services rendered. The reimbursement is treated as a disbursement in the billed department and as an expenditure reduction in the billing department.	Record Copy  Info Copy	District Office  Local School/ Dept. of Finance		FIVE YEARS; SUCCESSFUL AUDIT  SUCCESSFUL AUDIT	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.

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SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSF-011	EXPENDITURE CORRECTIONS (EX)  Used to adjust prior coding of expenditures.	Record Copy	District Office		FIVE YEARS; SUCCESSFUL AUDIT	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.
		Info Copy	Local School/ Dept. of Finance		SUCCESSFUL AUDIT	
GSF-012	REPORTS OF CASH RECEIPTS (CR)  Used to report and record the receipt of revenue and other funds by authorized representatives of the state.	Record Copy	State Treasurer		FIVE YEARS; SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
		Info Copy	District Office/ Local School		SUCCESSFUL AUDIT	
GSF-013	PERSONAL EXPENSE REIMBURSEMENTS (PV)  Payment vouchers used to reimburse state employees for travel expenses, including room and board, while on official state business, such as a convention or conference.	Record Copy	District Office		FIVE YEARS; SUCCESSFUL AUDIT	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.
		Info Copy	State Treasurer		SUCCESSFUL AUDIT	
GSF-014	REQUESTS FOR PURCHASE ORDER  Used to reserve funds in anticipation of establishing an obligation for the acquisition of goods and services. See GSF-008.	Info and Record Copy	District Office/ Local School		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.

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SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSF-015	<b>EXPENSE BUDGETS (EB)</b>  Allows agencies to further define funds available down to the object code level. Each item listed represents an object of expenditure within the appropriation.	Info and Record Copy	District Office/ Local School		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
GSF-016	<b>REVENUE BUDGETS (RB)</b>  Establishes the revenue side of the budget in DFMS. Each line represents the sources of revenue expected to be received.	Info and Record Copy	District Office/ Local School		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
GSF-017	<b>DEPOSIT SLIPS</b>  Bank receipts verifying amounts deposited into bank accounts. Attached to Reports of Cash Receipts, GSF-012.	Info Copy  Record Copy	District Office/ Local School  State Treasurer		SUCCESSFUL AUDIT  FIVE YEARS; SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
GSF-018	<b>CONTRACTS, AGREEMENTS, AND LEASES</b>  Formal contracts between state agencies and vendors for the furnishing of goods and services to agencies. Include copies of specifications, advertised bid proposals, and correspondence.  NOTE: Does not include Construction Contracts (GSF-035) or Professional Services Contracts (GSF-034).	Info and Record Copy	District Office/ Local School		TERMINATION OF GUARANTEE; SUCCESSFUL AUDIT	Retain at agency; termination of guarantee; successful audit; destroy.

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GSF-019	<b>TRANSFERS OF APPROPRIATIONS (TA)</b>	Info Copy	District Office		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.
	Used to transfer funds between current fiscal year appropriation accounts or to report all transfers of funds between appropriate accounts.	Record Copy	Budget Office		<b>SEVEN YEARS; SUCCESSFUL AUDIT</b>	
GSF-020	<b>LOCAL FUNDS FINANCIAL RECORD</b>	Record Copy	District Office		<b>SUCCESSFUL AUDIT PLUS TWO YEARS</b>	Retain at agency; successful audit plus 2 yrs; destroy.
GSF-021	<b>BIDS, BID SPECS, QUOTES</b>	Info and Record Copy	District Office		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
	Non-construction proposals to provide goods or services.					
GSF-022	<b>CAPITAL IMPROVEMENT BOND FILE (BOND REFERENDUM)</b>	Info and Record Copy	District Office		<b>SEE RETENTION INSTRUCTIONS</b>	Retain at agency 1 yr after completion of successful final audit if state funded. Retain at agency 3 yrs and completion of successful final audit if federally funded. (Longer retention applies if funds are commingled.)
	<b>A. Bond Ledger Books</b>	Info and Record Copy	District Office		<b>RETIREMENT OF BOND PLUS TWENTY YEARS</b>	

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<b>GSF-023</b>	<b>ANNUAL FINANCIAL STATEMENT TO DEPARTMENT OF EDUCATION</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>Documents relating to annual reporting of school system financial status.</b>	<b>Record Copy</b>	<b>Dept. of Education</b>		<b>PERMANENT</b>	
<b>GSF-024</b>	<b>SCHOOL SYSTEM INVESTMENT FILES</b>	<b>Info and Record Copy</b>	<b>District Office</b>		<b>THREE YEARS AFTER MATURITY; SUCCESSFUL AUDIT</b>	<b>Retain at agency 3 yrs after maturity; successful audit; destroy.</b>
	<b>Documents relating to investing of donations, endowments, and trust funds. Include authorizations, inter-bank transactions, treasury notes, certificates of deposit, invitations to bid, receipts, and related correspondence.</b>					
<b>GSF-025</b>	<b>AUDIT REPORTS, STATE</b>	<b>Info Copy</b>	<b>District Office</b>		<b>UNTIL NO LONGER NEEDED</b>	<b>Retain at agency until no longer needed; destroy.</b>
	<b>Audit reports of each state agency conducted by the Office of the Auditor of Accounts.</b>	<b>Record Copy</b>	<b>Auditor of Accounts</b>		<b>PERMANENT</b>	
<b>GSF-026</b>	<b>REQUISITIONS (RQ)</b>	<b>Info and Record Copy</b>	<b>District Office/ Local School</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>Written requests, usually from one sub-agency to the purchasing officer of the originating agency or between agencies for services. See GSF-014.</b>					

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GSF-027	AGENCY BANK ACCOUNTS (TR-1A, TR-1B, TR-1C)	Info Copy	District Office		CLOSE OF ACCOUNT; SUCCESSFUL AUDIT	Retain at agency; close of account; successful audit; destroy.
	Requests to State Treasurer for written approval prior to opening, closing, changing, or transferring any bank checking or savings account.	Record Copy	State Treasurer		CLOSE OF ACCOUNT; SUCCESSFUL AUDIT	
GSF-028	BANK ACCOUNT AND INVESTMENT REPORTS (BR-1B)				DELETED 06/30/94	
GSF-029	EQUIPMENT REIMBURSEMENT REQUESTS (ER-1)	Info Copy	District Office		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
	Used by agencies to obtain authorization for trade-in or sale of excess state-owned property.	Record Copy	Dept. of Finance		SUCCESSFUL AUDIT	
GSF-030	VENDOR FILES	Info Copy	District Office		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
	Contain agency copies of purchase orders with the agency copy of the payment vouchers attached. NOTE: See GSF-008 and GSF-009 for retention of record copies.					

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GSF-031	<b>CONTROL LEDGERS (MANUAL POSTING)</b>  Combined federal fund accounts only. A. Control by appropriation and object. B. Salaries by appropriation and object. C. Disbursements by object code (year-to-date), optional.	Info and Record Copy	District Office/ Local School		<b>CLOSE OF PROJECT; SUCCESSFUL AUDIT</b>	Retain at agency; close of project; successful audit; destroy.  <b>NOTE: See Common Rule, Appendix B. Individual grants may require longer retention periods. Special requirements are outlined in each grant's specifications. Refer to grant instructions.</b>
GSF-032	<b>JOURNAL VOUCHERS (JV)</b>  Used by the Division of Accounting to document accounting events not covered by any other DFMS transaction.	Record Copy  Info Copy	District Office  Dept. of Finance		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>  <b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.
GSF-033	<b>GAAP (GENERALLY ACCEPTED ACCOUNTING PRINCIPLES) REPORTING PACKAGES</b>  Annual financial reporting of data collection forms completed by all budgetary units. Used to collect required accrual data and to organize it by appropriate fund type.	Info Copy  Record Copy	District Office  Dept. of Finance		<b>SUCCESSFUL AUDIT</b>  <b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
GSF-034	<b>PROFESSIONAL SERVICES CONTRACTS</b>  Contain copy of contract; record of payments made to service provider; copy of any required evaluations; and any books, records, documents, accounting procedures, practices, or other items of service provider relevant to the contract.	Info and Record Copy	District Office		<b>THREE YEARS AFTER EXPIRATION OF CONTRACT; SUCCESSFUL AUDIT</b>	Retain at agency 3 yrs after expiration of contract; successful audit; destroy.

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SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSF-035	<p><b>CONSTRUCTION DOCUMENTS FOR CAPITAL AND MINOR IMPROVEMENT PROJECTS</b></p> <p>Construction documents for all capital improvement projects and minor capital improvement projects that change, modify, or alter hidden systems. All construction documents should be kept separate and apart from all other general and/or special fund accounts and all projects within any given year's program should have a separate, well-identified file. Agencies who are the contract owner and are the custodian of the construction documents should follow the retention for the record copy.</p>	Record Copy	District Office		PERMANENT	<p>Retain at agency 1 yr after completion of successful final audit if state funded. Retain at agency 3 yrs and completion of successful final audit if federally funded. (Longer retention applies if funds are commingled.) Purge per approved purge list (see below); transfer to Archives for permanent preservation.</p> <p><b>EXCEPTION:</b> Deeds of land acquisition and archival "as built drawings" - see "Transfer to Archives" below.</p> <p><b>NOTE:</b> Per Department of Education: The school district and/or architect of record shall supply one (1) electronic and one (1) hard copy (sealed and signed paper documents) of the construction record plans and specifications (as-built drawings and specifications) to the Department of Education no later than 30 calendar days after the completion of any major capital improvement project. DOE will coordinate the transfer and submission of the record plans and specifications to Archives. It is recommended that the school district maintain a copy of record plans (as- built drawings) also for local reference.</p>
		Info Copy	Local School		SEE RETENTION INSTRUCTION	<p>Retain at agency 1 yr after completion of successful final audit if state funded; retain at agency 3 yrs and completion of successful final audit if federally funded; destroy. (Longer retention applies if funds are commingled.)</p> <p>Updated 2010</p>

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**PURGE LIST  
for  
CONSTRUCTION DOCUMENTS FOR CAPITAL AND MINOR IMPROVEMENT PROJECTS (GSF-035)**

**The following documents should be RETAINED for inclusion in the permanent file:**

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| <ul style="list-style-type: none"> <li>a. DIVISION OF FACILITIES MANAGEMENT REVIEW/APPROVAL</li> <li>b. ARCHITECTURAL ACCESSIBILITY BOARD REVIEW AND APPROVAL</li> <li>c. PROFESSIONAL SERVICES CONTRACT</li> <li>d. LEGAL DETERMINATIONS</li> <li>e. CONSTRUCTION CONTRACT</li> <li>f. PERFORMANCE, LABOR, AND MATERIAL BONDS</li> <li>g. INSURANCE CERTIFICATE AND UPDATE</li> <li>h. PURCHASE ORDERS, PAYMENT VOUCHERS, AND BOOKS OF ACCOUNT INCLUDING ANY SIGNIFICANT BACKUP</li> <li>i. CHANGE ORDERS, INCLUDING ANY SIGNIFICANT BACKUP</li> <li>j. JOB MEETING MINUTES</li> <li>k. CORRESPONDENCE DETAILING SIGNIFICANT PROJECT ACTIVITIES</li> <li>l. CERTIFICATES (SUBSTANTIAL COMPLETION) AND PERMITS (OCCUPANCY, BUILDING) PLUS COUNTY AND/OR REGULATORY AGENCY SIGNOFFS</li> </ul> | <ul style="list-style-type: none"> <li>m. RELEASE OF LIENS AND AFFIDAVIT OF CONTRACTOR'S PAYMENT OF INDEBTEDNESS</li> <li>n. GUARANTEES AND WARRANTIES</li> <li>o. LIQUIDATED DAMAGE ASSESSMENT</li> <li>p. INSTRUCTIONS TO BIDDERS/JOB SPECIFICATIONS</li> <li>q. BIDDERS' PROPOSALS</li> <li>r. SUBCONTRACTORS' LISTING</li> <li>s. LETTER OF AWARD</li> <li>t. PROJECT RELATED SHOP DRAWINGS</li> <li>u. CODE OR SPECIFICATION REQUIRED CERTIFICATES, REPORTS, PERMITS OR INSPECTIONS (CONCRETE, GEOTECH, STEEL, ETC.)</li> <li>v. SPECIAL REPORTS (ENGINEERING, COST ANALYSIS)</li> </ul> |
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**The following documents should be PURGED from the permanent file prior to filming:**

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| <ul style="list-style-type: none"> <li>a. ADVERTISEMENT FOR BID</li> <li>b. TABULATION OF BID</li> <li>c. BID BOND RETURN</li> <li>d. PRELIMINARY SCHEMATICS</li> </ul> | <ul style="list-style-type: none"> <li>e. PRELIMINARY COST ESTIMATE</li> <li>f. WORKING BUDGET</li> <li>g. DUPLICATES</li> <li>h. CORRESPONDENCE OF LIMITED IMPORTANCE</li> </ul> |
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**The following documents should be TRANSFERRED TO THE ARCHIVES per 29 DE Code, Sections 507 and 508:**

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| <ul style="list-style-type: none"> <li>a. DEED OF LAND ACQUISITION</li> </ul> | <ul style="list-style-type: none"> <li>b. ARCHIVAL "AS BUILT" DRAWINGS</li> </ul> |
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GSF-036	<b>HEALTH INSURANCE MONTHLY REPORT FILE</b>  Consists of statement of contributions by the state. Included are additions and terminations to coverage.	Info and Record Copy	District Office		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
GSF-037	<b>FEDERAL TIME DISTRIBUTION SHEET FILE</b>  A record wherein payroll expenses are allocated to various federal programs and projects for purposes of cost accounting and managerial control.	Info and Record Copy	District Office		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
GSF-038	<b>FORM W-5</b>  Federal form used to request that advanced earned income credit be deducted from employee's wages.	Info and Record Copy	District Office	<b>CONF.</b>	<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
GSF-039	<b>WAGE ATTACHMENTS (GARNISHMENTS)</b>  Contain court orders and record of payments and deductions from employee's pay.	Info and Record Copy	District Office	<b>CONF.</b>	<b>SATISFACTION OF COURT ORDER; SUCCESSFUL AUDIT</b>	Retain at agency; satisfaction of court order; successful audit; destroy.
GSF-040	<b>IRS LEVIES</b>  Orders issued by the Internal Revenue Service (IRS) requiring deductions from employee salaries for the payment of taxes owed.	Info and Record Copy	District Office	<b>CONF.</b>	<b>ONE YEAR AFTER PAYMENT OF OBLIGATION</b>	Retain at agency 1 yr after notification of payment of obligation or final release of payment of obligation; destroy.

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GSF-041	<b>LEAVE AVAILABLE REPORTS</b>  Reports of accrual rate and monthly usage/accumulation of annual/sick leave. NOTE: See GSP-005 for cumulative leave record.	Info and Record Copy	District Office		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
GSF-042	<b>CHAPTER 1 &amp; 2 FILES</b>  Document federal grant program. Includes grant application, correspondence, plans for disbursement of funds, and financial records.	Info and Record Copy	District Office/ Local School		SUCCESSFUL AUDIT PLUS FIVE YEARS	Retain at agency; successful audit plus 5 yrs; destroy.
GSF-043	<b>GRANT FILES</b>  Agreements between federal and state agencies for the award of moneys to finance operations of state agencies.  NOTE: Does not include annual or ad hoc narrative or statistical reports on program activities. See GSA-006, Policy and Program Records for retention instructions.	Info and Record Copy	District Office		SEE RETENTION INSTRUCTION	Retain at agency in accordance with prescribed guidelines established by the grantor; successful final audit; destroy.  NOTE: (1) Grantor and grantee are responsible for maintaining all records of direct and indirect grants regardless of whether they are recipients or sub-recipients, in accordance with the prescribed guidelines established by the grantor. (2) Agencies receiving funds under federal legislation which specifically requires more than a three year retention must schedule those records separately on an agency records retention schedule. (See GSF-042, Chapter 1 & 2 Files.)
GSF-044	<b>FEDERAL AID MASTERS (FM)</b>  Contains pertinent data on a federal grant and sub-grant. Used to enter and modify descriptive and budgetary grant information.	Info Copy Record Copy	District Office Budget Office		SUCCESSFUL AUDIT TERMINATION OF PROGRAM	Retain at agency; successful audit; destroy.
GSF-045	<b>PR TRANSACTIONS ON DOCUMENT SUSPENSE FILE</b>  F25ZDH05/F25R4505(Daily) F25ZWC05/F25R1205(Weekly)	Info Copy Record Copy	District Office Dept. of Finance		REPLACE AS UPDATED REPLACE AS UPDATED	Replace as updated.

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<b>GSF-046</b>	<b>FEDERAL AID CHARGES (FC)</b>  Used for the recording of non-accounting charges against a grant.	Info and Record Copy	District Office		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
<b>GSF-047</b>	<b>REVENUE REPORTS</b>  Reports summarizing all collections deposited to the State Treasurer's account by an agency.	Info Copy  Record Copy	District Office  Dept. of Finance		<b>SUCCESSFUL AUDIT</b>  <b>FIVE YEARS; SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
<b>GSF-048</b>	<b>SCHEDULE OF ENCUMBRANCES</b>  F25R0805 Reflects the official accounting status of each department's encumbrances against its allotted funds.	Info Copy  Record Copy	District Office  Dept. of Finance		<b>SUCCESSFUL AUDIT</b>  <b>REPLACE AS UPDATED</b>	<b>Retain at agency; successful audit; destroy.</b>
<b>GSF-049</b>	<b>STATEMENTS OF BUDGETARY ACTIVITY AND ACCOUNT BALANCES</b>  F25ZAN05/F25RE605 Presents the status of each department's appropriated funds as recorded on the official accounting records of the state. Produced weekly/monthly.	Info Copy  Record Copy	District Office  Dept. of Finance		<b>SUCCESSFUL AUDIT</b>  <b>FIVE YEARS; SUCCESSFUL AUDIT</b>	<b>Retain year-end copy at agency; successful audit; destroy. Replace weekly and monthly reports as updated.</b>
<b>GSF-050</b>	<b>VALIDITY BALANCE REPORTS</b>  F25R1405 Show coding; description; available funds; estimated receipts; encumbrances; current and prior year expenditures; unencumbered balance.	Info Copy  Record Copy	District Office  Dept. of Finance		<b>REPLACE AS UPDATED</b>  <b>REPLACE AS UPDATED</b>	<b>Replace as updated.</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSF-051	<b>STATEMENT OF AVAILABLE FUNDS REPORTS</b>	Info Copy	District Office		<b>REPLACE AS UPDATED</b>	Replace as updated.
	F25ZM405/F25M0505 Show coding; appropriated amount; current/present year receipts; transfers in/out; reversions; and available funds amount.	Record Copy	Dept. of Finance		<b>REPLACE AS UPDATED</b>	
GSF-052	<b>TRANSACTIONS PROCESSED REPORTS</b>	Info Copy	District Office		<b>REPLACE AS UPDATED</b>	Replace as updated.
	F25R2005 Show coding; document ID/amount; vendor ID/name; and batch number.	Record Copy	Dept. of Finance		<b>REPLACE AS UPDATED</b>	
GSF-053	<b>BUDGETARY ACTIVITY REPORTS</b>	Info Copy	District Office/ Local School		<b>REPLACE AS UPDATED</b>	Replace as updated.
	F25RD605/F25RE705/F25RF505 Show coding; document ID; reference document; available funds; estimated receipts; encumbrances; expenditures; and unencumbered appropriated balances.	Record Copy	Dept. of Finance		<b>REPLACE AS UPDATED</b>	
GSF-054	<b>GENERAL FUND DISBURSEMENTS</b>	Info Copy	District Office		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
	F25ZAM05/F25A5605 Listing of general fund disbursements.	Record Copy	Dept. of Finance		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSF-055</b>	<b>CIP FUND DISBURSEMENTS</b>  F25ZAM05/F25A5405 Lists all bonds, associated amounts, and disbursements from CIP (Capital Improvement Project) funds. Also prints summary totals by object and section/division.	Info Copy	District Office		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
		Record Copy	Dept. of Finance		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	
<b>GSF-056</b>	<b>NON-CIP FUND DISBURSEMENTS</b>  F25ZAM05/F25A5505 Lists all non-CIP disbursements for the month.	Info Copy	District Office		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
		Record Copy	Dept. of Finance		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	
<b>GSF-057</b>	<b>YEAR-TO-DATE PROGRAM FUNDS REPORTS</b>  F25ZM405/F25RP105 Show coding; obj./rev. description; receipts; encumbrances and expenditures.	Info Copy	District Office		<b>REPLACE AS UPDATED</b>	<b>Replace as updated.</b>
		Record Copy	Dept. of Finance		<b>REPLACE AS UPDATED</b>	
<b>GSF-058</b>	<b>DETAIL PROGRAM FUNDS REPORTS</b>  F25ZM504/F25RP305 Show coding; vendor; doc. ID; reference document; receipts; encumbrances and expenditures.	Info Copy	District Office		<b>SEE RETENTION INSTRUCTION</b>	<b>Retain year-end copy at agency; successful audit; destroy. Replace monthly reports as updated.</b>
		Record Copy	Dept. of Finance		<b>SUCCESSFUL AUDIT</b>	
<b>GSF-059</b>	<b>FEDERAL AID CHARGES REPORTS</b>  F25ZM205/F25RG405 Used to reconcile federal fund accounts.	Record Copy	District Office		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
		Info Copy	Dept. of Finance/ Local School		<b>REPLACE AS UPDATED</b>	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSF-060</b>	<b>GRANTS ACTIVITY REPORTS</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>F25RG305</b> <b>Used to reconcile federal fund accounts.</b>	<b>Record Copy</b>	<b>Dept. of Finance</b>		<b>TEN YEARS</b>	
<b>GSF-061</b>	<b>FEDERAL AID FUNDS REPORTS</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>F25RG105</b> <b>Used to reconcile federal fund accounts.</b>	<b>Record Copy</b>	<b>Dept. of Finance</b>		<b>TEN YEARS</b>	
<b>GSF-062</b>	<b>APPROPRIATION REVENUE REPORTS</b>	<b>Info Copy</b>	<b>District Office</b>		<b>REPLACE AS UPDATED</b>	<b>Replace as updated.</b>
	<b>F25ZM205/F25RS505</b> <b>Show coding; revenue; current month receipts; and fiscal year-to-date receipts.</b>	<b>Record Copy</b>	<b>Dept. of Finance</b>		<b>SUCCESSFUL AUDIT</b>	
<b>GSF-063</b>	<b>OBJECT OF EXPENDITURE REPORTS</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>F25ZM205/F25RB105,F25RB305, F25RB405,F25RB505,F25RB605</b> <b>List all expenditures by object for use of central and agency managers to track spending by object. Show expenditures for general, special, and total funds for both month and year-to-date. Provide summary for statewide totals.</b>	<b>Record Copy</b>	<b>Dept. of Finance</b>		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	
<b>GSF-064</b>	<b>REVENUE BY BUDGET UNIT</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>F25M1105</b> <b>Show coding and current/year-to-date totals for general, special, and total funds.</b>	<b>Record Copy</b>	<b>Dept. of Finance</b>		<b>REPLACE AS UPDATED</b>	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSF-065</b>	<b>REVENUES BY DIVISION</b>  F25M1005 Same as GSF-064 except by Division.	Info and Record Copy	District Office		<b>REPLACE AS UPDATED</b>	<b>Replace as updated.</b>
<b>GSF-066</b>	<b>SPECIAL FUND REVENUE DETAIL TRANSACTION REPORTS</b>  F25R5105 Show coding; transaction ID; description; transaction date; accept date; and amount.	Info and Record Copy	District Office/ Local School		<b>REPLACE AS UPDATED</b>	<b>Replace as updated.</b>
<b>GSF-067</b>	<b>PAYROLL FUNDING REPORTS</b>  P25R2405 Detail all funding charges by employee and appropriation by department/division/section. Generated each pay cycle.	Info Copy	District Office	CONF.	<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
		Record Copy	Dept. of Finance	CONF.	<b>SIXTY YEARS</b>	
<b>GSF-068</b>	<b>PAYROLL CHECK REGISTERS</b>  P25C2005 Show details of each check written with totals. Generated each pay cycle.	Info Copy	District Office	CONF.	<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
		Record Copy	Dept. of Finance	CONF.	<b>SIXTY YEARS</b>	
			State Treasurer	CONF.	<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	
<b>GSF-069</b>	<b>DEDUCTION REGISTERS</b>  P25C2505 Detail deductions by employee by department/division/section. Generated each pay cycle.	Info Copy	Anywhere	CONF.	<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
		Record Copy	Dept. of Finance/ State Treasurer	CONF.	<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSF-070	<b>LABOR UNION REPORTS</b>	Info Copy	District Office	CONF.	SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
	<b>P25R8505</b> Lists of employees and union dues withheld. Generated each pay cycle.	Record Copy	Dept. of Finance	CONF.	SUCCESSFUL AUDIT	
GSF-071	<b>QUARTERLY SUMMARY/4TH QUARTER REPORTS</b>	Info Copy	District Office	CONF.	SUCCESSFUL AUDIT	Retain 4th quarter report at agency; successful audit; destroy.
	<b>P25Q1005</b> Detail all checks to an employee for the quarter by department/division/section. Generated quarterly.	Record Copy	Dept. of Finance	CONF.	SIXTY YEARS	
GSF-072	<b>ANNUAL (FY) PAYROLL FUNDING REPORTS</b>	Info Copy	District Office	CONF.	SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
	<b>P25Y7005</b> Reflects cumulative salary and other employment costs by appropriation code for employees in agency sequence. Generated annually.	Record Copy	Dept. of Finance	CONF.	TEN YEARS; SUCCESSFUL AUDIT	
GSF-073	<b>QUARTERLY FICA RECONCILIATION REPORT</b>				<b>DELETED 06/1991</b>	
GSF-074	<b>FUND-LINE EXCEPTION REPORTS</b>	Info Copy	District Office	CONF.	SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
	<b>P25A6005</b> Show charges that changed due to salary maintenance during the pay cycle. Generated each pay cycle.	Record Copy	Dept. of Finance	CONF.	REPLACE AS UPDATED	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSF-075	EMPLOYEE DICTIONARY (SSN/ALPHA)	Info Copy	District Office	CONF.	REPLACE AS UPDATED	Replace as updated.
	P25Q2305 (SSN) P25Q2405 (Alpha) Employee address listings in SSN and alpha sequence. Generated quarterly.	Record Copy	Dept. of Finance	CONF.	REPLACE AS UPDATED	
GSF-076	PAYROLL CLAIM FORM (PC-1) REPORTS	Info Copy	District Office	CONF.	CHECK REGISTER VERIFIED	Retain at agency; check register verified; destroy.
	P25A4005 Show GAAP FY appropriation code; regular/overtime gross; fringe charges; and total charges. Generated each pay cycle.	Record Copy	Dept. of Finance	CONF.	SUCCESSFUL AUDIT	
GSF-077	DEDUCTION CONTROL REGISTERS (DCR-1)	Info Copy	District Office	CONF.	THREE YEARS; SUCCESSFUL AUDIT	Retain at agency 3 yrs; successful audit; destroy.
	P25D1005 Three-part input documents containing deductions, home agency, direct deposit, and income tax withholding for each employee. Used when a position is newly created, or when there is a reclassification; change of agency or transfer; change of name or SSN; or change of deduction.	Record Copy	Dept. of Finance	CONF.	THREE YEARS; SUCCESSFUL AUDIT	
GSF-078	ATTENDANCE CONTROL REGISTERS (ACR)	Info Copy	District Office	CONF.	THREE YEARS; SUCCESSFUL AUDIT	Retain at agency 3 yrs; successful audit; destroy.
	P25ZA105/P25A5005 Input documents for pay/attendance data in the payroll system. Includes funding and hours/dollars/days.	Record Copy	Dept. of Finance	CONF.	THREE YEARS; SUCCESSFUL AUDIT	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSF-079	<b>PAYROLL ATTENDANCE CLAIM FORMS (AC-1)</b>	Info Copy	District Office	CONF.	<b>THREE YEARS; SUCCESSFUL AUDIT</b>	Retain at agency 3 yrs; successful audit; destroy.
	<b>P25ZA105</b> Total/cover sheets for the ACR's. Contain the projected totals for regular time and permanent premium hours plus dollars.	Record Copy	Dept. of Finance	CONF.	<b>THREE YEARS; SUCCESSFUL AUDIT</b>	
GSF-080	<b>PERSONNEL ACTION REQUESTS (PAR-3, PAR 4, PAR-34)</b>	Info Copy	District Office	CONF.	<b>FIFTY YEARS</b>	Retain in departmental personnel record (GSP-004).
	<b>P10C1504/P10A5504</b> Used to designate changes in an employee's personnel status, such as change of name, marital status, work location, salary change, or position change.	Record Copy	Local School			
GSF-081	<b>HEALTH CARE DISCREPANCY REPORTS</b>	Info Copy	District Office	CONF.	<b>RESOLUTION OF DISCREPANCY</b>	Retain at agency until discrepancy is resolved; destroy.
	<b>P25BC505</b> List of employees with coverage that were not charged. Generated each pay cycle.	Record Copy	Dept. of Finance	CONF.	<b>RESOLUTION OF DISCREPANCY</b>	
GSF-082	<b>VENDOR COVERSHEETS</b>	Info Copy	District Office	CONF.	<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
	<b>P25D5005</b> Detail all employees involved in a check to a vendor. Generated each pay cycle.	Record Copy	Dept. of Finance	CONF.	<b>SIXTY YEARS</b>	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSF-083	STIPEND CALCULATIONS  P25D9005 Shows any employee that the stipend program tried to update but could not for lack of proper data.	Info and Record Copy	District Office	CONF.	SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
GSF-084	CYCLE FUNDING ADJUSTMENT REPORTS  P25RF305 Show funding for handwritten checks. Year-to-date figures. Generated semi-annually.	Info Copy	District Office	CONF.	SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
		Record Copy	Dept. of Finance	CONF.	SIXTY YEARS	
GSF-085	CYCLE FUNDING ADJUSTMENT UPDATE REPORTS  P25RF405 Show funding for handwritten checks that have been updated.	Info Copy	District Office	CONF.	SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
		Record Copy	Dept. of Finance	CONF.	SIXTY YEARS	
GSF-086	INSURANCE UPDATES  P25RI107/P25RI107 Annual recalculation of state life insurance.	Info Copy	District Office		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
		Record Copy	Dept. of Finance		SIXTY YEARS	
GSF-087	VENDOR REFERENCE GUIDES  P25D1005 Listing by category of vendors to whom employee deductions are paid each pay cycle.	Info Copy	District Office		REPLACE AS UPDATED	Replace as updated.
		Record Copy	Dept. of Finance		REPLACE AS UPDATED	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSF-088</b>	<b>APPROPRIATION EXPENDITURES BY OBJECT CODE</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>F25RS405</b> Show coding; object description; current month's expenditures; and fiscal year-to-date expenditures.	<b>Record Copy</b>	<b>Dept. of Finance</b>		<b>REPLACE AS UPDATED</b>	
<b>GSF-089</b>	<b>STATEMENT OF APPROPRIATIONS (MONTHLY APPROPRIATION BALANCES)</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>
	<b>F25M0405</b> Show coding; available funds; estimated receipts; current and prior year expenditures; and unencumbered balance.	<b>Record Copy</b>	<b>Dept. of Finance</b>		<b>REPLACE AS UPDATED</b>	
<b>GSF-090</b>	<b>INTERNAL ACCOUNTS</b>	<b>Info and Record Copy</b>	<b>Local School</b>		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	<b>Retain at agency 5 yrs.; successful audit, destroy.</b>
	Financial documents maintained for various organizations/clubs within the local school. May contain the following documentation: Deposit books, blank statements, check request, invoice, cancelled checks, and bank statements.					
<b>GSF-091</b>	<b>INVOICES (IN)</b> Used when a billing is issued and/or to record anticipated revenues.	<b>Info and Record Copy</b>	<b>District Office/ Local School</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSF-092	<b>TELEPHONE BILLINGS</b>	Info	District		<b>THREE YEARS; SUCCESSFUL AUDIT</b>	Retain at agency 3 yrs; successful audit; destroy.
	Listing of monthly telephone usage.	Copy	Office/Local School			
GSF-093	<b>CHECK REGISTERS</b>	Info	District		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
	Reconciliation sheets, outstanding check lists, and copy of each check issued.	Copy	Office/Local School			
GSF-094	<b>REQUESTS FOR PROPOSALS (RFP)</b>	Info and	District		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
	Requests by agencies to vendors asking for proposals to provide goods or services.	Record Copy	Office/Local School			
GSF-095	<b>OPEN ORDER NOTEBOOKS</b>	Info	District		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
	<b>A. CONTROL LEDGER/NOTEBOOKS</b> For specific purchases and open-order purchase orders.	And Record Copy	Office/Local School			
	<b>B. ACCOUNTS RECEIVABLE</b> Amounts owed on an open account to a governmental unit by any other unit of state government.	Info and Record Copy	District Office/Local School		<b>COLLECTION; SUCCESSFUL AUDIT</b>	Retain at agency until collection; successful audit; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSF-096</b>	<b>UNCOLLECTABLE ACCOUNTS</b>  Removal of an account or partial account balance from an agency's active accounts receivable file and placed in the inactive permanent file.	Info and Record Copy	District Office/Local School		<b>COLLECTION OR FIFTY YEARS; SUCCESSFUL AUDIT</b>	Retain at agency until collection or 50 yrs.; successful audit; destroy.
<b>GSF-097</b>	<b>CANCELLED PAYROLL CHECK AND PERSONAL REIMBURSEMENT FORMS</b>  Used for canceling a payroll check or for an employee payroll personal reimbursement.	Info and Record Copy	District Office/Local School		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
<b>GSF-098</b>	<b>RECEIPTS LEDGERS</b>  Detailed ledger of all receipts under appropriate headings, classifications and arrangements as prescribed (i.e. budget unit, appropriation, and revenue code).	Info and Record Copy	District Office/Local School		<b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; destroy.
<b>GSF-099</b>	<b>MANUAL WARRANTS (MW)</b>  An order for payment prepared manually by the Department of Finance instead of via DFMS. The manual warrant and a payment voucher are then processed together.	Record Copy  Info Copy	District Office/Local School  State Treasurer		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>  <b>SUCCESSFUL AUDIT</b>	Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSF-100</b>	<b>AC-1 NOTIFICATION FORMS</b>  Signed authorizations to expand payroll funds. Forms returned to agency when there is a correction on the AC-1.	<b>Info Copy</b>	<b>District Office/Local School</b>	<b>CONF.</b>	<b>THREE YEARS; SUCCESSFUL AUDIT</b>	<b>Retain at agency 3 yrs.; successful audit; destroy.</b>
		<b>Record Copy</b>	<b>Dept. of Finance</b>	<b>CONF.</b>	<b>THREE YEARS; SUCCESSFUL AUDIT</b>	
<b>GSF-101</b>	<b>CASH ADJUSTMENTS (CA)</b>  Used by agencies in a transfer of special funds which does not require Budget Office or Controller General approval.	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>FIVE YEARS; SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; transfer to State Records Center for remainder of retention period; destroy.</b>
<b>GSF-102</b>	<b>FIXED ASSET REPORTS</b>  Document the acquisition and disposal of land; buildings; improvements other than buildings; equipment and vehicles owned by the state.  A. MONTHLY  B. ANNUAL	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>SEE RETENTION INSTRUCTIONS</b>	<b>Replace printouts as updated. Retain COM at agency; successful audit; destroy. Retain COM original master at State Records Center; successful audit; destroy.</b>
						<b>Retain printouts/COM at agency; successful audit; 10 yrs.; destroy. Retain COM original master 10 yrs. at State Records Center; destroy.</b>
<b>GSF-103</b>	<b>MONTHLY ACCOUNT RECONCILIATION REPORT</b>  Reconciliation reports for all budgetary activity, unliquidated encumbrances, and collection activity accounts.	<b>Info and Record Copy</b>	<b>District Office/Local School</b>		<b>SUCCESSFUL AUDIT</b>	<b>Retain at agency; successful audit; destroy.</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ACCOUNTING AND FINANCIAL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSF-104</b>	<b>EXCEPTION REPORTS</b>  Document any exceptions or adjustments that need to be made to the normal cycle of accounting processes (changes in hours, etc.).	Record Copy	District Office/Local School	CONF.	SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-001</b>	<b>AFFIRMATIVE ACTION PLAN FILE</b>  Documents relate to school system's plan for complying with statutes and regulations of the Equal Employment Opportunity Commission.	Info and Record Copy	District Office		<b>PERMANENT</b>	Retain at agency 2 yrs; film; destroy originals. Retain film permanently at Archives.
<b>GSA-002</b>	<b>BOND REFERENDUM PROMOTIONS FILE</b>  Documents relate to developing and promoting bond referendums for school systems. Includes management plan, strategies, booklets, pamphlets, related materials, and correspondence.	Info and Record Copy	District Office		<b>FIVE YEARS</b>	Retain at agency 5 yrs; destroy.
<b>GSA-003</b>	<b>CIVIL RIGHTS REPORT FILE</b>  Documents relate to reporting statistics on students. Includes Local School Report showing statistical data on pupils; on School System Summary Report showing compiled data for the whole school system and certified by Superintendent's signature; also included may be various working papers and/or computer generated reports.	Info and Record File	District Office		<b>A. REPORT PERMANENT</b>  <b>B. WORKING PAPERS SIX YEARS</b>	Retain at agency 6 yrs; film; destroy originals. Retain film permanently at Archives.
<b>GSA-004</b>	<b>BOARD OF EDUCATION INSURANCE POLICY FILE</b>  All non-student insurance policies. Includes insurance policies only.	Info and Record Copy	District Office		<b>UPDATED OR OBSOLETE; PLUS 30 YEARS</b>	Retain at agency until updated or obsolete plus 30 yrs; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-005	<p><b>CONTRACTS-USE OF SCHOOL BUILDINGS</b></p> <p>Request for authorization to use school facilities by various public and private organizations. Includes copy of contract and related correspondence.</p>	Info and Record Copy	District Office		ONE YEAR AFTER EXPIRATION OF CONTRACT	Retain at agency 1 yr. after expiration of contract; destroy.
GSA-006	<p><b>POLICY AND PROGRAM RECORDS (PRIMARY MISSION FILES)</b></p> <p>These records document the formulation and adoption of policies and procedures and the implementation or management of the program or functions of the office or department. Included are such records as (1) policies and procedures developed by the agency which governs the operation of the agency; (2) correspondence with citizens or other government officials regarding policy, procedural development; (3) annual, ad hoc, narrative or statistical reports on program activities, achievements or plans; (4) organizational charts and mission statements; (5) studies regarding department or office operations; (6) circular letters, directives or similar papers addressed to subordinate units or staff concerning policies, procedures or programs; and (7) records related to significant events in which the department or office participate. Records may include photographs, published materials, audio tapes, or other records forms.</p>	Record Copy	District Office		PERMANENT	<p>1) If agency needs access to records for continuing administrative use after successful audit:</p> <p style="padding-left: 40px;">Retain at agency; successful audit; film; destroy originals. Retain security film permanently at Archives.</p> <p>2) If agency needs occasional access to records after successful audit but before transfer to Archives:</p> <p style="padding-left: 40px;">Retain at agency; successful audit; transfer to State Records Center for 10 yrs.; transfer to Archives for permanent preservation.</p> <p>3) If agency has no use for the records after successful audit:</p> <p style="padding-left: 40px;">Retain at agency; successful audit; transfer to Archives for permanent preservation.</p> <p>NOTE: See also Appendix D, Records in Transition, for more specific requirements.</p> <p>NOTE: Information that is by statute, regulation, or court ruling confidential or restricted must be placed in separate containers and identified as such on Transfer Document (Form RM3) when transferred for filming.</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-007	<p><b>ADMINISTRATIVE SUPPORT RECORDS</b></p> <p>These records are of a general facilitative nature created or received in the course of administering programs. Included are such records as (1) correspondence of a routine or repetitive type, such as requests for information; (2) inter-office or inter-departmental communications which do not subsequently result in the formulation of policy; (3) reference materials, sometimes of a technical nature, used, but not created by the office; (4) daily, weekly, or monthly office activity reports which are summarized in annual reports or which relate to routine activities (including work progress or statistical reports prepared in the office and forwarded to higher levels); (5) personnel data on office staff which is duplicated in Departmental Personnel Record (GSP4); (6) purchase orders, payment vouchers, travel expense statements or similar financial papers which are duplicated in Department/Division fiscal office files; (7) daily, weekly, or monthly work assignments (including duty roster files) for office staff; (8) calendars, appointment books, schedules, logs, diaries, and other records documenting meetings, appointments, telephone calls, trips, visits, and other daily activities of State Employees; (9) unpublished calendars of events and activities.</p>	<p>Record Copy</p> <p>Info copy</p>	<p>District Office/Local School</p> <p>Anywhere</p>		<p>SUCCESSFUL AUDIT</p> <p>UNTIL NO LONGER NEEDED</p>	<p>Retain at agency until successful audit; destroy.</p> <p>Retain at agency until no longer needed; destroy.</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-008	<p><b>TRANSITORY FILES</b></p> <p>Documents of short-term interest that have no documentary or evidential value and normally need not be kept more than 1 month. Examples are shown below.</p> <p><b>A. Routine requests for information or publications and copies or replies which require no administrative action, no policy decision, and no special compilation or research for reply.</b></p> <p><b>B. Originating office copies of letters of transmittal that do not add any information to that contained in the transmitted material, and receiving office copy if filed separately from transmitted material.</b></p> <p><b>C. Quasi-official notices including memoranda and other records that do not serve as the basis of official actions, such as notices of holidays or charity and welfare fund appeals, bond campaigns, and similar records.</b></p>	Record Copy	District Office/Local School		SEE RETENTION INSTRUCTIONS	Retain at agency 1 month or until no longer needed, whichever is sooner; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-009</b>	<b>FINDING AIDS (OR INDEXES)</b>  Indexes, lists, registers and other finding aids used only to provide access to records authorized for destruction by the GSR5 or a DPA approved retention schedule, <b>EXCLUDING</b> records containing abstracts or other information that can be used as an information source apart from the related records that appear on an approved agency records retention schedule.	Record Copy	District Office/Local School		<b>SEE RETENTION INSTRUCTIONS</b>	Retain at agency with the related records; destroy or delete when retention period has been met for the finding aid to which the records relate as authorized by the General School Records Retention Schedule or approved agency records retention schedule.
<b>GSA-010</b>	<b>MINUTES, OFFICIAL STATE COMMITTEES, COMMISSIONS, BOARDS, AND COUNCILS</b>  Original official records of the proceedings of meetings. May include agendas and other relevant supporting material.	Record Copy	District Office/Local School		<b>PERMANENT</b>	Retain original at agency 2 yrs; successful audit; transfer to Archives for permanent preservation. Duplicate Copies: Retain duplicate at agency 10 yrs or Sunset Committee Review; destroy. <b>NOTE:</b> Minutes that are by statute, regulation or court ruling confidential or restricted must be placed in separate containers and identified as such on Transfer Document (Form RM-2) then transferred to the Archives.
<b>GSA-011</b>	<b>AGENCY STAFF MEETINGS</b>  Agendas, handouts, and minutes of any agency staff meetings.	Record Copy	District Office/Local School		<b>UNTIL NO LONGER NEEDED</b>	Retain at agency until no longer needed; destroy.  <b>NOTE:</b> Records that relate to the formulation of policies and procedures and the implementation of programs or functions of the office or department must be retained per the retention instructions for GSA-006, Policy and Program Records.  Updated 2010

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-012</b>	<b>INTERNAL COMMITTEE AND CONFERENCE FILES</b>  Records relating to establishment, organization, membership, and policy of internal committees. May include agenda, minutes, final reports, and related records documenting the accomplishments of the committee.	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>UNTIL NO LONGER NEEDED</b>	<b>Retain at agency until no longer needed; destroy. NOTE: Records that relate to the formulation of policies and procedures and the implementation of programs or functions of the office or Department must be retained per the retention instructions for GSA-006, Policy and Program Records.</b>
<b>GSA-013</b>	<b>VERBATIM RECORDINGS STENOGRAPHIC, AUDIO, OR VIDEO</b>  Recordings of meetings made exclusively for note taking or transcription of official meetings or proceedings, unless appearing on an agency's approved records retention schedule.	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>UNTIL TRANSCRIBED</b>	<b>Retain at agency until necessary transcription and approval of minutes or proceedings; delete or destroy. NOTE: If recordings are not transcribed they must be retained per the retention instructions for GSA-010, Minutes, Official State Committees, Commissions, Boards, and Councils; GSA-011, Agency Staff Meetings; GSA-012, Internal Committee and Conference Files or per an approved Agency Records Retention Schedule.</b>
<b>GSA-014</b>	<b>STATE AND FEDERAL GUIDELINES</b>  Guidelines issued by state and federal officials pertaining to program activities.	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>UNTIL SUPERSEDED</b>	<b>Retain at agency until superseded or updated; destroy.</b>
<b>GSA-015</b>	<b>DIRECTIVES, MANUALS, AND HANDBOOKS</b>  Publications produced by agency detailing operations, regulations, and/or procedures of the agency.	<b>Record Copy</b>  <b>Info Copy</b>	<b>District Office</b>  <b>Local School</b>		<b>PERMANENT</b>  <b>UNTIL NO LONGER NEEDED</b>	<b>Submit two copies upon publication to Archives; film via Delaware Documentation. Retain film permanently at Archives. Retain duplicate copies at agency until superseded and successfully audited for period in which publication was produced; destroy.</b>  <b>Retain until no longer needed; destroy.</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-016</b>	<b>RULES AND REGULATIONS</b>  Regulatory requirements set forth by statute and under the control of appropriate agencies for enforcement thereof.	Record Copy  Info Copy	District office  Local School		PERMANENT  UNTIL NO LONGER NEEDED	Submit two copies to Archives upon publication; film via Delaware Documentation.  Retain copy 10 yrs and then until no longer needed; destroy. (29 DE Code Sec. 519)
<b>GSA-017</b>	<b>ANNUAL REPORTS, STATE AGENCY</b>  Annual reports prepared at Department/Division/Bureau levels that document the activities of the unit.	Record Copy	District Office		PERMANENT	Retain one copy at agency until successful audit; submit two copies to Archives upon publication; film via Delaware Documentation.
<b>GSA-018</b>	<b>PUBLICATIONS, STATE</b>  Printed matter published by state agencies for distribution to the public. (See Delaware Documentation Procedures for definition of "Publications"). (20 Del Code Sec. 519)	Record Copy  Info Copy	Local School/ District Office  Anywhere		PERMANENT  UNTIL NO LONGER NEEDED	Submit two copies to Archives upon publication; film via Delaware Documentation.  Retain at agency until no longer needed; destroy.
<b>GSA-019</b>	<b>REFERENCE MATERIAL</b>  Externally generated books, magazines, pamphlets, manuals, and other printed matter used for general purposes.	Record Copy	District Office		UNTIL NO LONGER NEEDED	Retain at agency until successful audit; destroy.
<b>GSA-020</b>	<b>LEGISLATION, AGENCY FILES</b>  Documents pertaining to bills and prospective legislation. Copies of bills and proposed (drafted) legislation. Supporting material relating to legislation, such as newspaper clippings, reports, correspondence.	Record Copy	District Office		PERMANENT	Retain at agency 2 yrs after termination of session; film; destroy originals. Retain film permanently at Archives.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-020 Cont'd</b>	Reference copies of legislation which affects the agency	Info Copy	Local School		<b>UNTIL NO LONGER NEEDED</b>	Retain at agency until no longer needed; destroy.
<b>GSA-021</b>	<b>EXECUTIVE ORDERS, PROCLAMATIONS AND LEGISLATIVE ADVISORIES</b>  Instructions issued by the Governor as the Chief Executive of State government.	Record Copy  Info Copy	Office of the Governor  District Office		PERMANENT  <b>UNTIL NO LONGER NEEDED</b>	Retain at agency until superseded; destroy.
<b>GSA-022</b>	<b>ATTORNEY GENERAL'S OPINIONS</b>  Consists of, but is not limited to written opinions of lasting significance establishing policy or precedent answering legal questions from all program areas involving questions of interpretation of Delaware or federal law.	Record copy  Info Copy	Dept. of Justice  District Office		PERMANENT  <b>UNTIL NO LONGER NEEDED</b>	Retain at agency until no longer pertinent to the operation of an agency; destroy.
<b>GSA-023</b>	<b>PUBLIC RELATIONS FILE</b>  File consists of news releases and clippings, cassette recordings of broadcast announcements, speeches, and any other public relations materials.	Record Copy	District Office		<b>SEE RETENTION INSTRUCTIONS</b>	Retain at agency until no longer required for administrative purposes; transfer to Archives for permanent preservation.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-024	<p><b>LEGAL ADVERTISEMENTS</b></p> <p>This record series consists of, but is not limited to, advertisements which have appeared in newspapers or matters pertaining to the agency and other legal ads which may or may not indirectly affect the agency; i.e., bid invitations (does not include construction contracts), public sales, notice of public hearings, public sales, etc. <b>NOTE:</b> See GSF35, Construction Documents for Capital Improvement Projects, for retention instructions.</p>	Record Copy	District Office		SUCCESSFUL AUDIT	<p>Retain at agency until successful audit; destroy.</p> <p>Updated 2010</p>
GSA-025	<p><b>SPEECHES</b></p> <p>Records of public speeches given by representatives of state agencies. (Also see GSA23).</p> <p>A. Speeches that relate to general information about the agency.</p> <p>B. Speeches that relate to issues, policies, and procedures that document or discuss the activities of State Government.</p> <p>C. Speeches of high level officials including the heads of departments and independent agencies, their deputies and assistants; the heads of program offices and staff offices including assistant secretaries, administrators, and school board members; directors of offices, bureaus, or equivalent; staff assistants to those aforementioned officials, such as special assistants, and administrative assistants; and political appointees.</p>	Record Copy	District Office		<p>UNTIL NO LONGER NEEDED</p> <p>PERMANENT</p> <p>PERMANENT</p>	<p>Retain at agency until no longer needed; destroy.</p> <p>Retain at agency 2 yrs; transfer to Archives for permanent preservation.</p> <p>Retain at agency 2 yrs; transfer to Archives for permanent preservation.</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-026</b>	<b>TELEPHONE LOG</b>  A. Listing of long distance calls. Record copy made by agency personnel for a particular time period.  B. Record of incoming calls. Listing of incoming calls to an agency.  C. Phone Memo Book. Record of messages taken for agency employees.	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>RECONCILIATION; SUCCESSFUL AUDIT</b>	<b>Retain at agency; reconcile with Telephone Billing (GSF-092); successful audit; destroy.</b>
		<b>Record Copy</b>	<b>District Office/Local School</b>		<b>ONE MONTH</b>	<b>Retain at agency 1 month; destroy.</b>
		<b>Record Copy</b>	<b>District Office/Local School</b>		<b>ONE MONTH</b>	<b>Retain at agency 1 month; destroy.</b>  <b>Updated 2010</b>
<b>GSA-027</b>	<b>SIGN-IN/VISITOR CONTROL LOG</b>  Logs, registers, and other records that document employees', visitors, and clients entrance into a state facility or office during and/or after office hours.	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>THREE YEARS</b>	<b>Retain at agency 3 yrs; destroy.</b>
<b>GSA-028</b>	<b>INCIDENT REPORTS</b>  Reports completed when an incident has occurred where the state might be liable for damages.	<b>Record Copy</b>	<b>District Office</b>	<b>CONF.</b>	<b>THREE YEARS</b>	<b>Retain at agency 3 yrs; destroy.</b>  <b>Incidents that result in Grievances (GSP-007) should follow the retention instructions for that series.</b>  <b>Updated 2010</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-029</b>	<p><b>KEY ACCOUNTABILITY FILES</b></p> <p>Files relating to accountability for keys issued.</p> <p>A. For areas under maximum security.</p> <p>B. For other areas.</p>	<p>Record Copy</p> <p>Record Copy</p>	<p>District Office/Local School</p> <p>District Office/Local School</p>		<p>3 YEARS AFTER TURN-IN</p> <p>6 MONTHS AFTER TURN-IN</p>	<p>Destroy 3 yrs. after turn-in of key.</p> <p>Destroy six months after turn-in of key.</p>
<b>GSA-030</b>	<p><b>LISTS/DIRECTORIES</b></p> <p>Includes mailing lists, directories, rosters, and registers compiled by the agency.</p>	Record Copy	District Office/Local School	CONF.	UNTIL SUPERSEDED	Retain at agency until superseded; destroy.
<b>GSA-031</b>	<p><b>DEEDS TO STATE PROPERTY</b></p> <p>Documents establishing the state's legal title to real property.</p>	Record Copy	District Office		PERMANENT	Transfer original to Archives upon receipt for permanent preservation. Retain copy at agency in property file. (29 Del. Code Sec. 508).
<b>GSA-032</b>	<p><b>SURVEY/MAPS</b></p> <p>Materials relating to surveying and mapping activities used in locating, marking, and erecting of boundaries, property lines, corners, monuments and markers, road placements, including aerial photography and reproduction.</p>	Record Copy	District Office		PERMANENT	Retain at agency until no longer needed; transfer to Archives for permanent preservation.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-033</b>	<b>ARCHITECTURAL AND ENGINEERING PLANS / BLUEPRINTS</b>				<b>DELETED 2010</b>	See Series GSF-035 for retention instructions.  Updated 2010
<b>GSA-034</b>	<b>VEHICLE OPERATIONS FILE</b>  A. Includes maintenance records relating to service and repair, warranty, and guarantee statements, operating manual.  B. Operating records including those related to gas and oil consumption, dispatching, and scheduling.  C. Vehicle mileage reports documents use of vehicles and number of miles traveled.	Record Copy  Record Copy  Record Copy	District Office/Local School  District Office/Local School  District Office/Local School		<b>DISPOSAL OF VEHICLE PLUS SUCCESSFUL AUDIT</b>  <b>SUCCESSFUL AUDIT</b>  <b>SUCCESSFUL AUDIT</b>	Retain at agency until disposal and/or transfer, sale, or surplus of vehicle; successful audit; destroy.  Retain at agency until successful audit; destroy.  Retain at agency until disposal of equipment; successful audit; destroy.
<b>GSA-035</b>	<b>EQUIPMENT MAINTENANCE FILES</b>  Contains information reflecting the individual history of major equipment repair and maintenance; i.e., work orders, dates, locations, cost of parts, cost of labor, etc. (Also see Vehicle Operations File, GSA34).	Record Copy	District Office/Local School		<b>DISPOSAL OF EQUIPMENT; SUCCESSFUL AUDIT</b>	Retain at agency until disposal of equipment; successful audit; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-036</b>	<b>WARRANTY FILE</b>  Warranties for equipment purchased by an agency for its use.	<b>Record Copy</b>	<b>District Office/Local School</b>		<b>UNTIL EQUIPMENT SOLD OR SURPLUSED</b>	<b>Retain at agency until equipment is sold, surplused, or otherwise removed from service; destroy.</b>
<b>GSA-037</b>	<b>RECORDS MANAGEMENT</b> Includes materials relating to the records management program of an agency.					
	<b>A. Records Retention Schedule</b>	<b>Info Copy</b>	<b>District Office/Local School</b>		<b>UNTIL UPDATED</b>	<b>Retain at agency until updated; destroy.</b>
		<b>Record Copy</b>	<b>Archives</b>		<b>PERMANENT</b>	
	<b>B. Records Manual</b>	<b>Info Copy</b>	<b>District Office/Local School</b>		<b>UNTIL UPDATED</b>	<b>Retain at agency until updated; destroy.</b>
		<b>Record Copy</b>	<b>Archives</b>		<b>PERMANENT</b>	
	<b>C. Destruction notices (RM-5) Approval requests for destruction of state records.</b>	<b>Info Copy</b>	<b>District Office/Local School</b>		<b>TEN YEARS; SUCCESSFUL AUDIT</b>	<b>Retain at agency 10 yrs; successful audit; destroy.</b>
		<b>Record Copy</b>	<b>Archives</b>		<b>PERMANENT</b>	
	<b>D. Transfer Document (RM-3) Listing of records transferred to Archives by agency.</b>	<b>Info Copy</b>	<b>District Office/Local School</b>		<b>DESTRUCTION OF RECORDS TRANSFERRED</b>	<b>Retain at agency until destruction of records transferred; destroy.</b>
		<b>Record Copy</b>	<b>Archives</b>		<b>PERMANENT</b>	

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-037 Cont'd	<p>E. Records Inventory (Records Series Description and Analysis Form). Appraisal form of each record series appearing on an approved Records Retention Schedule (GSA37A).</p> <p>F. Correspondence, directives, policies and related materials concerning the records management program.</p>	<p>Info Copy</p> <p>Record Copy</p> <p>Info Copy</p> <p>Record Copy</p>	<p>District Office/Local School</p> <p>Archives</p> <p>District Office/Local School</p> <p>Archives</p>		<p>APPROVAL OF SCHEDULE</p> <p>PERMANENT</p> <p>UNTIL SUPERSEDED</p> <p>PERMANENT</p>	<p>Retain at agency until record retention schedule is approved; destroy.</p> <p>Retain at agency until superseded; destroy.</p>
GSA-038	<p><b>FORMS FILES</b></p> <p>A. One record copy of each form created by an agency with related instructions and documentation showing creation, scope, and purpose of the form.</p> <p>B. Background materials, requisitions, specifications, processing data, and control records.</p>	<p>Record Copy</p> <p>Record Copy</p>	<p>District Office/Local School</p> <p>District Office/Local School</p>		<p>UNTIL SUPERSEDED OR DISCONTINUED</p> <p>UNTIL SUPERSEDED OR DISCONTINUED</p>	<p>Retain at agency until related form is discontinued, superseded, or canceled; destroy.</p> <p>Retain at agency until related form is discontinued, superseded, or canceled; destroy.</p>
GSA-039	<p><b>PHOTOGRAPHS</b></p> <p>Photographs/collection of photographs that document agency missions/programs and/or are related to significant events in which the department or office participated (See GSA20 &amp; GSA6). Also includes photographs of routine award ceremonies, social events, and activities not related to the mission of the agency, as well as, internal personnel and administrative training filmstrips and slides of programs. May also include an index to the above.</p>	<p>Record Copy</p>	<p>District Office</p>		<p>PERMANENT</p>	<p>Retain at agency until no longer needed; transfer to Archives for permanent preservation.</p>

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ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-040	<p><b>GRAPHIC ARTS</b></p> <p>A. Routine artwork for handbills, flyers, posters, letterhead, and other graphics.</p> <p>B. Line and halftone negatives, screened paper prints and offset lithographic plates used for photo-mechanical reproduction.</p> <p>C. Line copies of graphs and charts.</p>	<p>Record Copy</p> <p>Record Copy</p> <p>Record Copy</p>	<p>District Office/Local School</p> <p>District Office/Local School</p> <p>District Office/Local School</p>		<p>UNTIL NO LONGER NEEDED</p> <p>UNTIL NO LONGER NEEDED</p> <p>UNTIL NO LONGER NEEDED</p>	<p>Retain at agency until no longer needed; destroy.</p> <p>Retain at agency until no longer needed; destroy.</p> <p>Retain at agency until no longer needed; destroy.</p>
GSA-041	<p><b>MOTION PICTURES/VIDEO RECORDINGS/SOUND RECORDINGS</b></p> <p>A. Films/recordings acquired from outside sources for personnel and management training; rehearsal or practice tapes; recordings documenting routine meetings and awards presentations; and duplicate prints and preprint elements required for preservation, duplication, and reference.</p> <p>B. Internal personnel and administrative training programs that do not reflect the mission of the agency. These include "role-play" sessions, management and supervisory instruction, etc.</p>	<p>Record Copy</p> <p>Record Copy</p>	<p>District Office/Local School</p> <p>District Office/Local School</p>		<p>UNTIL NO LONGER NEEDED</p> <p>ONE YEAR AFTER COMPLETION</p>	<p>Retain at agency until no longer needed; destroy.</p> <p>Retain at agency 1 yr after completion of training program; destroy.</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-041	<p><b>MOTION PICTURES / VIDEO RECORDINGS / SOUND RECORDINGS (Cont.)</b></p> <p><b>C. Films/recordings created to document agency activities and events, public relations, promotions, etc.</b></p> <p><b>D. Video images created while monitoring activities within and outside of public buildings. Security setups vary; recordings may be continuous, stopframe, random, or triggered by ‘panic button’ use. Also show date and time indexing information.</b></p>	<p><b>Record Copy</b></p> <p><b>Record Copy</b></p>	<p><b>District Office/Local School</b></p> <p><b>District Office/Local School</b></p>	<p></p> <p><b>CONF.</b></p>	<p><b>PERMANENT</b></p> <p><b>SEE RETENTION INSTRUCTIONS</b></p>	<p><b>Retain at agency 2 yrs; transfer to Archives for permanent preservation.</b></p> <p><b>Retain ‘incident’ videos 3 yrs; reuse. Retain other video records for the maximum length of time allowed by the recording system or 30 days, whichever is longer; reuse.</b></p>
GSA-042	<p><b>SUSPENSE FILES</b></p> <p><b>Documents arranged in chronological order as a reminder that an action is required on a given date or that a reply to action is expected and, if not received, should be traced on a given date.</b></p> <p><b>A. A note or other reminder to take action</b></p> <p><b>B. The file copy or an extra copy of an outgoing communication, filed by the date on which a reply is expected.</b></p>	<p><b>Info and Record Copy</b></p> <p><b>Info and Record Copy</b></p>	<p><b>District Office/Local School</b></p> <p><b>District Office/Local School</b></p>	<p></p>	<p><b>SEE RETENTION INSTRUCTIONS</b></p> <p><b>SEE RETENTION INSTRUCTIONS</b></p>	<p><b>Destroy after action is taken.</b></p> <p><b>Withdraw documents when reply is received. (1) If suspense copy is an extra copy, destroy immediately. (2) If suspense copy is the file copy, incorporate into the official files.</b></p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-043	<p><b>TRACKING AND CONTROL RECORDS</b></p> <p>Logs, registers, and other records used to control or document the status of correspondence, reports or other records that are authorized for destruction by the General School Schedule or a DPA approved records retention schedule.</p>	Record Copy	District Office/Local School		UNTIL NO LONGER NEEDED	Retain at agency until no longer needed; destroy.
GSA-044	<p><b>DRIVER EDUCATION ANNUAL REPORT TO DEPARTMENT OF EDUCATION</b></p> <p>Reports to the State Department of Education, on an annual basis, giving the number of students and teachers participating in driver education. Includes report from each school and system-wide summary or equivalent.</p> <p><b>A. DRIVER EDUCATION STUDENTS' FINAL GRADES (Comprehensive List)</b></p> <p>Final grades for the forty-four hour driver education course shall be either pass or fail. Pass/fail grades are submitted by all local and charter schools and must be received by DOE no later than June 30<sup>th</sup> for regular driver education programs and August 31<sup>st</sup> for summer driver education programs.</p> <p><b>NOTE: For Individual Student Grades see Series GSS-001, 002, or 004.</b></p>	<p>Info Copy</p> <p>Record Copy</p> <p>Record and Info Copy</p>	<p>District Office/Local School</p> <p>Dept. of Education</p> <p>Dept. of Education/ District Office/Local School</p>	CONF.	<p>ONE YEAR</p> <p>PERMANENT</p> <p>SEVEN YEARS</p>	<p>Retain at agency 1 yr; destroy.</p> <p>Retain at District Office/Local School for 7 yrs; destroy. See Department of Education Series AEWD-002.</p> <p>14 DE Administrative Code 540.4.1</p> <p>Updated 2010</p>
GSA-045	<p><b>DRIVER EDUCATION VEHICLE AGREEMENTS</b></p> <p>Documents relate to obtaining vehicles for the Driver Education Program. Includes agreement for obtaining vehicles for the Driver Education Program.</p>	Record Copy	District Office		VEHICLE RETURNED	Retain at agency until returned to lending agency; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-046	<b>EMERGENCY PREPAREDNESS PLANS</b>  Documents relate to planning for man-made or natural disasters or emergencies. Includes copy of plan.	Info and Record Copy	District Office/Local School		<b>SUPERSEDED OR OBSOLETE</b>	Retain at agency until superseded or obsolete; destroy.
GSA-047	<b>STUDENT ENROLLMENT / UNIT ALLOTMENT REPORTS / RECORDS</b>	Info Copy	Local School and District Office	CONF	<b>THREE YEARS; SUCCESSFUL AUDIT</b>	Retain at agency 3 yrs; successful audit; destroy.  Title 14 Education 700 Finance and Personnel 701 Unit Count 1.2  Revised 2008
	Enrollment packet reflecting September 30 <sup>th</sup> unit calculations which are based on school enrollment. The enrollment packet may contain the following information: Student enrollment and classification information from the district, each local school in the district or charter school and vocational areas. Information reflects regular students, special education, full-time, part-time, and school choice enrollment. The data submitted to Department of Education is used to calculate funding levels.	Record Copy	Department of Education		PERMANENT	See DOE Retention Schedule, Series #TMD-002C  Revised 2006
GSA-048	<b>GOVERNMENT EQUIPMENT LEASE/LOAN FILES</b>  Documents relate to leasing government equipment for use in vocational education programs. Includes agreements, lease equipment inventory, shipping instructions, bills of lading, related documents, and correspondence.	Info and Record Copy	District Office/Local School		<b>FIVE YEARS AFTER EXPIRATION OF LEASE</b>	Retain at agency 5 yrs after expiration of lease; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-049	<p><b>PRIVATE SCHOOLS ENROLLMENT</b></p> <p>Statistics for annual report to the State Board of Education showing information related to the number of students enrolled in each private school in the school district, including working papers and related correspondence.</p>	<p>Info Copy</p> <p>Record Copy</p>	<p>District Office/Local School</p> <p>Department of Education</p>		<p>THREE YEARS</p> <p>PERMANENT</p>	<p>Retain at agency 3 yrs after submission to the State Department of Education; destroy.</p> <p>Updated 2010</p>
GSA-050	<p><b>REAPPORTIONMENT PLAN FILES</b></p> <p>Documents relate to redrawing district lines based on census report. Includes maps, planning and working documents, district description (s), related correspondence.</p>	Record Copy	District Office		PERMANENT	Retain at agency 3 yrs. after final resolution of issue; film; destroy originals. Retain film permanently at Archives.
GSA-051	<p><b>SCHOOL BOARD ATTORNEY LEGAL CASE FILES</b></p> <p>Files may contain the following: legal briefs, consent decrees, correspondence, etc.), resolution of legal questions regarding employee matters, insurance, EEOC, property matters, employee and parent lawsuits, and other legal issues.</p>	Record Copy	District Office	CONF.	PERMANENT	<p>Retain at agency 3 yrs after final resolution. Transfer to Archives for permanent preservation.</p> <p>Updated 2010</p>
GSA-052	<p><b>SPECIAL EDUCATION MONTHLY AND ANNUAL ATTENDANCE REPORTS</b></p> <p>Documents used for determining allocation of funds for special education teachers. Includes Dept. of Education Form, "Special Education Monthly Report" or equivalent showing how teachers are used and number of students served in different programs; monthly computer printouts showing same information; and annual summary from the Department of Education.</p>	<p>Info Copy</p> <p>Record Copy</p>	<p>District Office</p> <p>Dept. of Education</p>		<p>FIVE YEARS</p> <p>PERMANENT</p>	Retain annual summary at agency 5 yrs; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-053</b>	<b>STUDENT ATTENDANCE FILE</b>  Information on student enrollments, attendance, absences, and withdrawals. May include the following: Attendance register cards, printouts and daily attendance.	Info and Record Copy	District Office/Local School	CONF.	<b>100 YEARS</b>	Retain at agency through end of school year; transfer to Archives for 99 yrs; transfer information to Student Cumulative Record annually; destroy. (See Series GSS-001, 002, 003, & 004 in Student Records section).  Updated 2010
<b>GSA-054</b>	<b>STUDENT OR VISITOR INJURY FILES</b>  Reports and investigation of injuries to students or visitors on school buses or grounds. Included are (but not limited to) report of accident, investigation report, and compiled statistics on injuries for school and school system as a whole.	Info and Record Copy	District Office/Local School		<b>3 YEARS W/ EXCEPTIONS</b>	Retain at agency 3 yrs; destroy. Exception for injuries to minors: Retain 25 yrs; destroy.
<b>GSA-055</b>	<b>BUILDING INSPECTIONS/REPAIRS</b>  Document periodic inspections and necessary repairs to school buildings.	Info and Record Copy	District Office		<b>FIVE YEARS</b>	Retain at agency 5 yrs; destroy.
<b>GSA-056</b>	<b>VOCATIONAL SUMMER SCHOOL FILES</b>  Documents relate to applying for and operating summer vocational schools. Includes application, regulations, reports, related documents, and correspondence.	Info and Record Copy	District Office/Local School		<b>SUCCESSFUL AUDIT</b>	Retain at agency until successful audit; destroy.
<b>GSA-057</b>	<b>STATE STANDARDS FOR DELAWARE SCHOOLS</b>  Documents relating to meeting State standards for Delaware schools. Includes State Standards Manual, guidelines, reports, related documents, and correspondence.	Info and Record Copy	District Office/Local School		<b>UNTIL SUPERSEDED</b>	Retain at agency until superseded; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-058</b>	<b>COMPREHENSIVE PLAN FILES</b>  Documents relate to planning the development of education in the school system. Includes working papers, drafts, correspondence, and final plan for development of education (in such areas as vocational education, special education, etc.).	Record Copy	District Office		PERMANENT	Retain at agency 5 yrs; transfer to Archives for permanent preservation.  Updated 2010
<b>GSA-059</b>	<b>SCHOOL SYSTEM STUDIES &amp; REPORTS FILES</b>  Documents relate to various studies by private and other government agencies requested by the superintendent and usually approved by the school board. Includes working papers, correspondence, related documents, and final report.	Info and Record Copy	District Office		PERMANENT	Retain at agency 5 yrs; transfer to Archives for permanent preservation.  Updated 2010
<b>GSA-060</b>	<b>ACCREDITATION CERTIFICATES</b>  Documents relate to accreditation and include only the accreditation certificate received by each school or school system.	Info and Record Copy	District Office		UNTIL RECEIPT OF NEXT CERTIFICATE	Retain at agency until receipt of next certificate; destroy.
<b>GSA-061</b>	<b>ANNUAL APPLICATION FOR CONTINUED ACCREDITATION</b>  Documents relate to requesting and obtaining continued accreditation in each school and school system. Includes annual application, notification of standards met, and related correspondence.	Record Copy	District Office		PERMANENT	Retain at agency 5 yrs; transfer to Archives for permanent preservation.  Updated 2010

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-062</b>	<b>TEN-YEAR SELF-STUDY REPORTS</b>  Documents relating to maintaining accreditation of individual schools and school systems. Includes Ten-year Self-Study and working papers.	Record Copy	District Office		<b>PERMANENT</b>	Retain at agency 10 yrs; transfer to Archives for permanent preservation.  Updated 2010
<b>GSA-063</b>	<b>SPECIAL AWARDS FILES</b>  Documents relate to selecting schools, teachers, or other professional staff for special recognition for outstanding achievement. Includes recommendations, ratings, procedures, requirements, notices of awards, related material, and correspondence.	Info and Record Copy	District Office/Local School		<b>TEN YEARS</b>	Retain at agency 10 yrs; destroy. Note: Personnel receiving special awards should have a copy placed in personnel permanent record folder, GSP-004.
<b>GSA-064</b>	<b>SCHOOL HISTORICAL FILES AND ARTIFACTS</b>  Documents and artifacts relate to recording the development of individual schools. Includes scrapbooks, activity and yearbooks, clippings, school newspapers, pictures, pamphlets, trophies, films, slides, showing the historical developments of individual schools and students.	Record Copy	District Office/Local School		<b>PERMANENT</b>	Retain at agency 10 yrs; transfer to Archives for permanent preservation.
<b>GSA-065</b>	<b>SCHOLARSHIP AND AWARDS FILES</b>  Documents relate to selecting outstanding students for scholarships or awards based on achievement. Includes criteria for selection, judges' score sheets, notification of award, and related correspondence.	Info and Record Copy	District Office/Local School		<b>TEN YEARS</b>	Retain at agency 10 yrs; destroy. NOTE: Outstanding achievement should be noted on student cumulative record, GSS-001, 002, 003, & 004.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSA-066	<p><b>CURRICULUM COURSE GUIDES</b></p> <p>Documents relate to maintaining a record of Curriculum Course Guides for all school curriculum courses. Includes a copy of the Curriculum Course showing philosophy, scope, and related materials objectives and methods of evaluation.</p>	Info and Record Copy	District Office/Local School		FIVE YEARS	Retain at agency 5 yrs; destroy.
GSA-067	<p><b>TEACHER, PARENT, STUDENT HANDBOOKS</b></p> <p>Documents relate information on school operations to parents, students, and teachers. Includes handbooks, pamphlets, brochures, schedules, etc., showing rules, policies, and procedures.</p>	Info and Record Copy	District Office/Local School		PERMANENT	Submit two copies to Archives upon publication for Delaware Documentation.
GSA-068	<p><b>TEXTBOOK ADOPTION RECOMMENDATIONS</b></p> <p>Documentation of authorization to purchase textbooks for adoption and use in the school system. May include microfilm copy of textbook or list of books, supplementary materials, procedure and criteria involved in selection, related papers, and correspondence.</p>	Info and Record Copy	District Office/Local School		FIVE YEARS	Retain at agency 5 yrs; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ADMINISTRATIVE FILES**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSA-069</b>	<b>NOMINATING PETITIONS</b>  Contains petitions used to nominate candidates for membership on the school board. Information on the petitions include: name of candidate seeking office, name of person signing petition, address of petitioner signer, and date of signing.	Info and Record Copy	District Office		<b>ONE YEAR</b>	Retain at agency 1 yr.; destroy.
<b>GSA-070</b>	<b>ORIGINAL ELECTION RETURN RECORDS</b>  Contains election returns documenting the election of school board officials.	Record Copy	District Office		<b>PERMANENT</b>	Retain at agency 10 yrs; transfer to Archives for permanent preservation.
<b>GSA-071</b>	<b>VOTER LIST</b>  Contains the names of eligible voters in the school district.	Info and Record Copy	District Office/Local School		<b>ONE YEAR</b>	Retain at agency 1 yr; destroy.
<b>GSA-072</b>	<b>VOTER SIGNATURE CARD</b>  Contains the name and address of eligible voter.	Info and Record Copy	District Office/Local School		<b>ONE YEAR</b>	Retain at agency 1 yr; destroy.
<b>GSA-073</b>	<b>ABSENTEE BALLOTS</b>  Voters that are not going to be physically able to vote at the polls send in a paper ballot with their vote marked.	Record Copy	District Office	<b>CONF.</b>	<b>TWO YEARS</b>	Retain at agency 2 yrs; destroy.  Updated 2010
<b>GSA-074</b>	<b>VOTER QUALIFICATION RECORDS</b>  Copies of documents that verify voter's qualifications to vote, e.g. age, address, etc.	Record Copy	District Office		<b>UNTIL NO LONGER NEEDED</b>	Retain at agency until no longer needed; destroy.  Updated 2010

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ELECTRONIC RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSER-001</b>	<b>MASTER FILES / MASTER RECORDS</b>  Relatively permanent computer files containing an organized, consistent set of records of complete and accurate information. Usually referred to as a data system or record-keeping system.	Record Copy	Agency		SEE RETENTION INSTRUCTIONS	Maintain at agency. Delete after expiration of the retention period as authorized by an approved retention schedule.  NOTE: If electronic version replaces hard copy records with differing retention periods, and agency software does not readily permit selective deletion, delete after the longest retention period has expired.
<b>GSER-002</b>	<b>RECORDS USED TO CREATE AND MAINTAIN MASTER FILES</b>  Records recorded on electronic media used to create or update a master file, including, but not limited to, work files, transaction files, and intermediate input/output records.	Record Copy	Agency		SEE RETENTION INSTRUCTIONS	Delete after information has been transferred to the master file and verified.  NOTE: If this data is necessary to reconstruct the master file or required for audit, it should be listed on an agency approved records retention schedule.
<b>GSER-003</b>	<b>TEST RECORDS</b>  Electronic files or reports created in the monitoring and testing of system quality and performance.	Record Copy	Agency		SEE RETENTION INSTRUCTIONS	Delete/destroy after test is evaluated, and all problems or issues are resolved.
<b>GSER-004</b>	<b>PRINT RECORDS</b>  Records extracted from a data file without changing values, often producing hard copy publications, tabulations, ledgers, registers, and reports.	Record Copy	Agency		SEE RETENTION INSTRUCTIONS	Delete/destroy when no longer needed.
<b>GSER-005</b>	<b>CONTINGENCY BACKUP RECORDS</b>  Electronic media containing data identical to primary electronic files and retained in case they are damaged or lost.	Record Copy	Agency		MINIMUM OF THREE CYCLES	Maintain a minimum of 3 cycles.  NOTE: Contingency backup records should be maintained apart from the master file or data system in a secure offsite facility.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ELECTRONIC RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSER-006	WORD PROCESSING AND ELECTRONIC MAIL RECORDS				DELETED 10/01/1999	Replaced by GSER-014 and 015.
GSER-007	ELECTRONIC SPREADSHEETS				DELETED 10/01/1999	Replaced by GSER-014.
GSER-008	SYSTEMS USAGE RECORDS  Electronic files created to monitor system usage, including but not limited to, log-in files, password files, audit trail files, and cost-back files used to assess charges for system use.	Record Copy	Agency		THREE YEARS; SUCCESSFUL AUDIT	Retain at agency 3 yrs; successful audit; delete/destroy.
GSER-009	SYSTEMS PERFORMANCE RECORDS				DELETED 01/01/1999	Incorporated into GSER-003.
GSER-010	PLANNING, DEVELOPMENT AND EVALUATION RECORDS  Consist of planning, development, and evaluation records relating to selection (including feasibility studies and materials supporting decision); implementation; upgrading, modification, or conversion of systems and equipment; procedures; and manuals pertaining to the acquisition and use of electronic record-keeping systems.	Record Copy	Agency		SEE RETENTION INSTRUCTIONS	Retain at agency 1 yr after longest retention for information maintained on system has expired, or 1 yr after successful migration of data to new system; destroy.
GSER-011	SYSTEMS DOCUMENTATION  File consists of record layouts; code books; technical specifications; programs and equipment; detailed program descriptions; flow charts; test data; job control language; computer operating instructions; and other records pertaining to systems operation.	Record Copy	Agency		SEE RETENTION INSTRUCTIONS	Retain at agency 1 yr after longest retention for information maintained on system has expired, or 1 yr after successful migration of data to new system; destroy.  NOTE: See GSER-003 for documentation relating to systems testing.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ELECTRONIC RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSER-012	<p><b>FEASIBILITY STUDIES</b></p> <p>Studies and system analyses conducted before the installation of any technology or equipment associated with information management systems. Typically include a consideration of the benefits of the proposed system, including an analysis of the added efficiency and effectiveness to be expected, plus a cost analysis. See GER-010 for systems selected.</p>	Record Copy	Agency		SUCCESSFUL AUDIT	Retain at agency; successful audit; destroy.
GSER-013	<p><b>Y2K (YEAR 2000) FILES</b></p>				DELETED 03/01/2009	
GSER-014	<p><b>ELECTRONIC DATA RECORDS</b></p> <p>Documents (letters, memoranda, reports, directives, etc.), databases, spreadsheets, Geographic Information System (GIS) data, or other records recorded on any type of electronic media.</p>					<p>NOTE: See also <i>Model Guidelines for Electronic Records</i> on DPA's website for additional guidance and recommendations concerning the creation, maintenance, and disposition of electronic records.</p>
	<p>A. When used to produce hard copy which is maintained in organized files.</p>	Record Copy	Agency		UNTIL HARD COPY IS PRODUCED	Delete after producing hard copy, including any metadata, or delete when no longer needed to update or produce hard copy.
	<p>B. When maintained only in electronic form, duplicating the information in and taking the place of records that would otherwise be maintained in hard copy.</p>	Record Copy	Agency		SEE RETENTION INSTRUCTIONS	Delete after the expiration of the retention period as authorized by an approved records retention schedule.
						<p>NOTE: If electronic version replaces hard copy records with differing retention periods, and agency software does not readily permit selective deletion, delete after the longest retention period has expired.</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
ELECTRONIC RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSER-015</b>	<b>ELECTRONIC MAIL</b>  Text documents and attachments stored on electronic media containing communicated messages, such as correspondence, memoranda, and circular letters.	<b>Record Copy</b>	<b>Agency</b>		<b>SEE RETENTION INSTRUCTIONS</b>	<b>See <i>Electronic Mail</i> policy on DPA's website for retention recommendations.</b>
<b>GSER-016</b>	<b>WEBSITE RECORDS</b>  Collections of information, documents, and databases that are provided to a user community utilizing World Wide Web formats and protocols.	<b>Record Copy</b>	<b>Agency</b>		<b>SEE RETENTION INSTRUCTIONS</b>	<b>See <i>Guidelines for Maintaining and Preserving Records of Web-Based Activities</i> on DPA's website for retention recommendations.</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
FOOD SERVICE**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSFS-001</b>	<b>INVENTORIES</b>					
	<b>A. Food</b>  Documents all foods and supplies (except equipment) purchased/received by schools.	Info and Record Copy	District Food Service Supervisor		<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
	<b>B. Equipment</b>  Includes warranties and guarantees of cafeteria equipment.	Info and Record Copy	District Food Service Supervisor		<b>LIFE OF EQUIPMENT</b>	Retain at agency for life of equipment; destroy.  Revised 2017
<b>GSFS-002</b>	<b>MENUS</b>  List of food served for each school day.	Info and Record Copy	District Food Service Supervisor		<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
<b>GSFS-003</b>	<b>DAILY PRODUCTION BOOK/RECORD</b>  Documents quantities of food prepared, offered, portion sizes used, saved or discarded for each day.	Info and Record Copy	District Food Service Supervisor		<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
<b>GSFS-004</b>	<b>DAILY RECORD BOOK/LEDGER</b>  The number of meals served by category.	Info and Record Copy	District Food Service Supervisor		<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
<b>GSFS-005</b>	<b>PREPAID MEAL RECORD</b>  Meal ticket information of payments made in advance.	Info and Record Copy	District Food Service Supervisor		<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
FOOD SERVICE**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSFS-006</b>	<b>FREE/REDUCED PRICE MEAL RECORDS</b>  Requests for meal services at free/reduced prices. Contains the following: Applications, Status Authorization Civil Rights Compliance Form, and verification records.	Info and Record Copy	District Food Service Supervisor	CONF	<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
<b>GSFS-007</b>	<b>FREE/REDUCED ROSTER</b>  List of participating students.	Info and Record Copy	District Food Service Supervisor	CONF	<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
<b>GSFS-008</b>	<b>DAILY RECEIPT REPORTS</b>  Documents the receipts for each day.	Info and Record Copy	District Food Service Supervisor			
	<b>A. Cash Register/ Journal Tape Day End Reports/Cash and Checks</b>				<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
	<b>B. Cash Register Tape Sales Summary Report (Z)</b>				<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
<b>GSFS-009</b>	<b>FEDERAL CLAIM FOR REIMBURSEMENT</b>  Documents the total number of free, reduced, paid breakfasts, lunches, and snacks, served during the month that are being claimed for reimbursement of federal funds.	Info Copy	District Food Service Supervisor		<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017
		Record Copy	Department of Education		<b>THREE YEARS</b>	Retain at agency for 3 years; successful audit; destroy.  Revised 2017

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FOOD SERVICE**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSFS-010</b>	<b>COORDINATED REVIEW EFFORT (CRE)</b>  Verifies daily meals claimed by comparing attendance, enrollment and participation factors. Includes the following: audit report, edit checks.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
<b>GSFS-011</b>	<b>RECEIPTS / RECEIPT BOOKS</b>  Documents monies received by agency from clients, customers, etc., for fees or services rendered.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
<b>GSFS-012</b>	<b>PURCHASE ORDER (PO) REGULAR</b>  Authorizes the delivery of specified merchandise or the rendering of a certain service showing the amount of funds authorized for the same.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
<b>GSFS-013</b>	<b>PAYMENT VOUCHER (PV) REGULAR DIRECT CLAIM</b>  A request for payment to a vendor for goods or services in accordance with a properly executed purchase order or contractual agreement.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
<b>GSFS-014</b>	<b>INTERGOVERNMENTAL VOUCHER (IV)</b>  Interdepartmental billing form used by a state agency to bill another state agency for goods and/or services rendered. The reimbursement is treated as a disbursement in the billed department and is an "expenditure reduction" in the billing department.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
FOOD SERVICE**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSFS-015</b>	<b>PERSONAL EXPENSE REIMBURSEMENT (PV) (PE)</b>  Payment voucher used to reimburse state employees for travel expenses including room and board, while on official state business or at a convention or conference.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  Revised 2017
<b>GSFS-016</b>	<b>BANK STATEMENTS, CANCELLED CHECKS, CHECK STUBS</b>  Statement and cancelled checks reflecting financial status with a bank.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  Revised 2017
<b>GSFS-017</b>	<b>DEPOSIT SLIPS</b>  Bank receipts verifying the amount deposited into bank account.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  Revised 2017
<b>GSFS-018</b>	<b>REPORT OF CASH RECEIPT (CR)</b>  Document recording revenue received by an agency.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  Revised 2017
<b>GSFS-019</b>	<b>CONTRACTS, AGREEMENTS, AND LEASES</b>  Formal contacts between state agencies and qualified vendors for the furnishing of goods and services utilized by the district. May include copies of specifications, advertised bid proposals, and other correspondence. <b>NOTE: Does not include construction Contracts (GSF-035) or Professional Services Contracts (GSFS-034).</b>	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  Revised 2017

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
FOOD SERVICE**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSFS-020</b>	<b>BIDS, QUOTES, BID SPECIFICATIONS</b>  Formal documentation of advertised bidding, telephone quotes and specifications for items out on bid. <b>NOTE: Does not include construction contracts. (See GSF-038, Construction Documents, for retention instructions.</b>	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
<b>GSFS-021</b>	<b>VENDOR FILE</b>  Record of expenditures by company. May include invoices and statements.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
<b>GSFS-022</b>	<b>FINANCIAL STATEMENTS</b>  Financial status as reported to local school board.	<b>Info and Record Copy</b>	<b>District Food Service Supervisor</b>		<b>REPLACE AS UPDATED</b>	<b>Replace as updated.</b>  <b>Revised 2017</b>
<b>GSFS-023</b>	<b>SALARY ENTITLEMENT FORM (OCT. REPORT)</b>  Justification from 0116 monies.	<b>Info Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
		<b>Record Copy</b>	<b>Department of Education</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
<b>GSFS-024</b>	<b>BI-ANNUAL FINANCIAL REPORT</b>  Statement of income and expense for six months.	<b>Info Copy</b>	<b>District Food Service Supervisor</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>
		<b>Record Copy</b>	<b>Department of Education</b>		<b>THREE YEARS</b>	<b>Retain at agency for 3 years; successful audit; destroy.</b>  <b>Revised 2017</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
FOOD SERVICE**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSFS-025</b>	<p><b>COMMODITY RECORDS</b></p> <p>Records related to distribution and usage of USDA donated foods. Includes the following:</p> <ul style="list-style-type: none"> <li>A. Commodity Agreement with OMB/Contracting</li> <li>B. Allocation Form (food offered, accepted or rejected).</li> <li>C. Deleted (Jan. 2002)</li> <li>D. Deleted (Jan. 2002)</li> <li>E. Food Preference Reports.</li> <li>F. Commodity Delivery Invoices/Delivery Tickets (signed)</li> <li>G. G. Processing and Storage Invoices</li> <li>I. H. USDA Commodity Rebate Forms</li> <li>J. Transfer Records (food transferred to another school) (retain for own records.)</li> <li>K. Deleted (Jan. 2002)</li> </ul>	Info and Record Copy	District Food Service Supervisor		<b>THREE YEARS</b>	<p>Retain at agency for 3 years; successful audit; destroy.</p> <p>Revised 2017</p>
	<b>COMPUTERIZED MEAL COUNTING SYSTEM</b>					
<b>CMCS-001</b>	<p><b>DAY END CASH REPORT</b></p> <p>This form is completed daily by each cashier. Cashier completes form when counting money. Amounts of actual money are recorded by bills and coins per register and submitted to the manager to declare money in the computer.</p>	Info and Record Copy	District Food Service Supervisor		<b>SUCCESSFUL AUDIT</b>	<p>Retain at agency; successful audit; destroy.</p> <p>Revised 2017</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
FOOD SERVICE**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
CMCS-002	<p><b>DAILY STATUS REPORT</b></p> <p>Generated by each school from database and sent to District Office for reporting. Contains number of students fed, deposit figures and sales figures. Generated daily/weekly/monthly.</p>	Info and Record Copy	District Food Service Supervisor		SUCCESSFUL AUDIT	<p>Retain at agency; successful audit; destroy.</p> <p>Revised 2017</p>
CMCS-003	<p><b>DATABASE BALANCE REPORTS</b></p> <p>Generated by School Food Service Manager to be sent to the Administrative Office to record breakfast, lunch, and snacks eaten. Can be used as a reference document at the Point of Sale (POS). Contains children's names, eligibility code, and balance in account.</p>	Info and Record Copy	District Food Service Supervisor		SUCCESSFUL AUDIT	<p>Retain at agency; successful audit; destroy.</p> <p>Revised 2017</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
LOCAL SCHOOL**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSL-001	<b>SCHOOL EMERGENCY FIRE DRILL RECORDS</b>  Documents relate to recording and reporting fire drills held in each school.	Info and Record Copy	Local School		<b>THREE YEARS</b>	Retain at agency 3 yrs; destroy.
GSL-002	<b>TEACHER'S RECORD OF STUDENT ATTENDANCE</b>  Includes teacher's daily, weekly, or yearly record of student attendance, absences, tardiness (information is transcribed to State required attendance files located in Student Cumulative Record - GSS 001, 002, 003, 004	Info and Record Copy	Local School	CONF.	<b>ONE YEAR</b>	Retain at agency 1 yr.; transfer information to Student Cumulative Record annually; destroy. (See (Item #GSS001, 002, 003, 004 for retention).
GSL-003	<b>TEACHER'S STUDENT FOLDER FILE</b>  File on each student containing various classroom notes, student's grades, attendance, and participation data, related material necessary for teacher's classroom administration.	Info and Record Copy	Local School	CONF.	<b>SEE RETENTION INSTRUCTIONS</b>	Retain at agency for one additional year after the end of each school year with no discrepancies; destroy.  Updated 2010
GSL-004	<b>SCHOOL LIBRARY ACCESSION BOOKS</b>  A list or other index of books, periodicals, filmstrips, films, and other material assigned or added to the library.	Info and Record Copy	Local School		<b>PERMANENT</b>	Retain at agency permanently.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
LOCAL SCHOOL**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSL-005	<b>SCHOOL LIBRARY CIRCULATION RECORDS</b>	Info and Record Copy	Local School		<b>THREE YEARS</b>	Retain at agency 3 yrs.; destroy.
	A record indicating the daily, monthly, and annual activity of the library. Generally shows circulation statistics, fees received (sometimes with received), new borrowers, circulation statistics for holdings by category (i.e., Nonfiction, fiction, adult, juvenile, paperbacks, magazines, visual aids, and totals.					
GSL-006	<b>LOCAL SCHOOL ADVISORY COMMITTEE</b>	Record Copy	District Office		<b>PERMANENT</b>	Retain at agency 5 yrs; film; destroy originals. Retain film permanently at Archives.
	Documents recording activities and recommendations of citizens advisory committee to local schools. Includes by-laws, list of members, minutes of meetings or record of proceedings, reports of school or Board of Education.					
GSL-007	<b>DEPARTMENT OF HEALTH AND SOCIAL SERVICES SCHOOL VERIFICATION FORM</b>	Info Copy	Local School	<b>CONF.</b>	<b>ONE SCHOOL YEAR</b>	Retain at agency 1 school yr.; destroy.
	Division of Social Services form received by local schools to verify enrollment and attendance for those students receiving Medicaid Benefits. Form is completed and original returned to Division of Social Services.					

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSP-001	<p><b>UNSUCCESSFUL APPLICATIONS FOR EMPLOYMENT</b></p> <p>Contain original applications for employment, as well as resumes, DD214, transcripts, and letters of commendation or recommendation.</p> <p>NOTE: Applications of persons hired by an agency should be retained in the Departmental Personnel Record (See GSP-004A).</p>	Record Copy	District Personnel Office	CONF.	THREE YEARS OR FINAL DISPOSITION	<p>Retain at agency 3 yrs. or through final disposition of charges of discrimination or legal action; destroy. (29 DE Code, Section 10002; 29 CFR 1602, 1627.3)</p> <p>Department of Education (DOE-250012 02/06) Instructions and Procedures for completion of a Civil Rights On-Site compliance Review</p> <p>Updated: 2008</p>
GSP-002	<p><b>JOB ANNOUNCEMENT POSTINGS</b></p> <p>Contain description of job position; qualifications; salary; job location; and opening and closing dates.</p>	Record Copy Info Copy	District/ Local School Office		THREE YEARS OR FINAL DISPOSITION	<p>Retain 1 copy at agency 3 yrs. after closing date or through final disposition of charges of discrimination or legal action; destroy. Retain copies at agency through closing date; destroy. (29 CFR 1627.3)</p> <p>Department of Education (DOE-250012 02/06) Instructions and Procedures for Completion of a Civil Rights On-site compliance Review</p> <p>Updated 2008</p>
GSP-003	<p><b>LISTING OF AUTHORIZED POSITIONS (LAP)</b></p> <p>Job #P10C0404 Report listing budgeted positions; pay grade class code; name; and SSN by state agency. Generated each pay cycle.</p>	Info Copy Record Copy	District Office/Local School Dept. of Finance	CONF. CONF.	REPLACE AS UPDATED REPLACE AS UPDATED	<p>Replace as updated. (29 CFR 516, 1620, and 1627.3)</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSP-004</b>	<p style="text-align: center;"><b>PERSONNEL RECORD, DEPARTMENTAL</b></p> <p style="text-align: center;">Master personnel record for each employee established and maintained by the appointing authority of each agency.</p>	<b>Record Copy</b>	<b>District Personnel Office</b>	<b>CONF.</b>	<b>FIFTY YEARS AFTER TERMINATION</b>	<p>Retain at agency 3 yrs. after termination; successful audit; purge per approved purging list (See page 35); transfer to State Records Center for 47 yrs.; destroy.</p> <p>(29 DE Code, Section 10002; CFR 516, 1602, 1620 and 1627; DE Code Title 14 Education 700 Finance and Personnel; section 716.</p> <p style="text-align: right;">Updated: 2008</p>

**NOTE:** These records are to be maintained for a period not less than 50 years. Such records include, but are not limited to, annual salaries, sick leave, and vacation information. For retention instructions on documents not listed, see individual school district records retention schedules.

**A. SUCCESSFUL APPLICANTS**

Application of person hired by an agency. May include resume, DD214, transcripts, and letters of commendation or recommendation.

**Record Copy**

**District Personnel Office**

**CONF.**

**FIFTY YEARS**

**Retain in Departmental Personnel Record (GSP-004). (29 DE Code, Section 10002)**

**B. REQUESTS FOR LEAVE**

Employee's individual requests for leave with pay for annual, sick, compassionate, military, educational or compensatory leave or leave without pay.

**Info and Record Copy**

**District Personnel Office/  
Local School**

**CONF.**

**SEE RETENTION INSTRUCTIONS**

**Transfer information to Cumulative Attendance and Leave record (GSP-004C); successful audit; purge individual requests. (29 DE Code, Section 10002)**

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
	<p><b>C. ATTENDANCE AND LEAVE, CUMULATIVE</b></p> <p>Attendance cards or forms used to record employee attendance and leave data for an annual or biennial period. Usually in the form of a calendar for each employee, which shows days, annual/sick, leave earned and taken each month, total leave accumulated and similar related information. NOTE: Does not include Attendance Sheets, Time Entry Reports (See GSP-008).</p>	Record Copy	District Personnel Office	CONF.	FIFTY YEARS AFTER TERMINATION	Retain at agency until card or form is filled or employee terminated; place in Departmental Personnel Record (GSP-004).
	<p><b>D. BENEFITS</b></p> <p>File contains authorizations for benefits (health/life insurance, blood bank, credit union, savings bonds, etc.) acquired or waived by state employees.</p>	Record Copy	District Personnel Office	CONF.	FIFTY YEARS AFTER TERMINATION	Retain initial and most recent version of each form in Departmental Personnel Record (GSP-004).
	<p><b>E. EMPLOYEE CONTRACT FILES</b></p> <p>Documents relate to employment agreements between school boards and designated professional employees.</p>	Record Copy	District Personnel Office	CONF.	FIFTY YEARS AFTER TERMINATION	Retain at agency until termination; transfer to Departmental Personnel Record (GSP-004). (14 DE Code, Section 1094)
	<p><b>F. RECOMMENDATIONS/ COMMENDATIONS</b></p> <p>Letters of appreciation/commendation of employee's performance.</p>	Record Copy	District Personnel Office	CONF.	TERMINATION OF EMPLOYEE	Retain in Department Personnel Record (GSP-004) until employment termination, return to employee. (29 DE Code, Section 10002)

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSP-005	PERSONNEL RECORD, SUB-DEPARTMENTAL  Sub-departmental personnel record may contain the same information as the departmental record. Maintained for informational purposes.	Info Copy	District Personnel Office/Local School	CONF.	TERMINATION OF EMPLOYEE	Retain at agency until employment termination; transfer to central Personnel Office for comparison and purging; destroy.
GSP-006	SUBSTITUTE/TEMPORARY PERSONNEL FILES  Documents relate to employment of persons who accrue no retirement benefits as a result of employment. May include the following: applications, tax forms, transcripts, certificates, related documents, and correspondence.	Info and Record Copy	District Personnel Office/ Local School	CONF.	FIVE YEARS	Retain at agency 5 yrs; destroy.  Updated: 2008
GSP-007	GRIEVANCES  Record of employee's dissatisfaction with working conditions. Include reason for action, evidence against agency, responses, and results of hearings.	Record Copy	District Personnel Office	CONF.	THIRTEEN YEARS	Retain at agency 3 yrs.; transfer to State Records Center for 10 yrs.; final disposition of charges; destroy.  NOTE: Grievances should not be kept in Departmental Personnel Record, but in a separate file.
GSP-008	ATTENDANCE SHEETS; TIME ENTRY REPORTS  Daily record of employee hours worked.	Info and Record Copy	District Personnel Office/Local School	CONF.	THREE YEARS; SUCCESSFUL AUDIT	Retain at agency 3 yrs.; successful audit; destroy.  (29 CFR 516 and 1627)
GSP-009	WORKER'S COMPENSATION FILES  Document incidents of state employees injured on the job or in the line of duty. May include personal injury reports; vehicle accident reports; invoices; doctor and medical bills; police reports; and correspondence.	Record Copy	District Personnel Office/ Dept. of Labor	CONF.	SIX YEARS	Retain at agency 6 yrs.; destroy.  NOTE: Notice to parties once file has been closed 5 yrs. it will be retained one yr. after closure and destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSP-010</b>	<b>AFFIRMATIVE ACTION FILES</b>  Correspondence, reports, plans, and related affirmative action materials.	<b>Info and Record Copy</b>	<b>District Personnel Office/Local School</b>		<b>PERMANENT</b>	<b>Retain at agency 5 yrs.; transfer to the Delaware Public Archives for permanent preservation. (29 CFR 1602)</b>
<b>GSP-011</b>	<b>COLLECTIVE BARGAINING RECORDS</b>  Contracts correspondence, and details of negotiations.	<b>Info and Record Copy</b>	<b>District Personnel Office</b>		<b>TEN YEARS; SUCCESSFUL AUDIT</b>	<b>Retain at agency 10 yrs.; successful audit; destroy.</b>
<b>GSP-012</b>	<b>EMPLOYEE IDENTIFICATION CARDS/BADGES</b>  Proof of employment with a state agency, showing name, agency, job title, and picture.	<b>Info and Record Copy</b>	<b>District Personnel Office/Local School</b>		<b>TERMINATION OF EMPLOYEE</b>	<b>Retrieve from employee upon termination of employment; destroy.</b>
<b>GSP-013</b>	<b>FIRST REPORT OF OCCUPATIONAL INJURY OR DISEASE</b>  Copies of reports of injury and/or occurrences involving employees which do not result in worker's compensation claim and are not a part of the Departmental Personnel Record (GPR-004).	<b>Info and Record Copy</b>	<b>District Personnel Office/Local School</b>	<b>CONF.</b>	<b>FIVE YEARS</b>	<b>Retain at agency 5 yrs.; destroy.</b>
<b>GSP-014</b>	<b>MATERIAL SAFETY DATA SHEETS(MSDS)</b>  Contain an MSDS for each hazardous substance, which has been identified on the chemical Information Lists (GSP-015). Each MSDS reflects information provided by the manufacturer of the substance.	<b>Info and Record Copy</b>	<b>District Personnel Office/Local School</b>		<b>PERMANENT</b>	<b>Retain at agency 5 yrs.; transfer to the Delaware Public Archives for permanent preservation. (16 DE Code, Ch.24;29CFR 1910)</b>
<b>GSP-015</b>	<b>CHEMICAL INFORMATION LISTS (CIL)</b>  Lists containing names of chemicals used or stored in or near work areas.	<b>Info and Record Copy</b>	<b>District Personnel Office/Local School and DNREC</b>		<b>PERMANENT</b>	<b>Retain at agency 5 yrs.; transfer to the Delaware Public Archives for permanent preservation.</b>  <b>NOTE: List to be updated as necessary, but not less than once a year. (16 DE Code, Ch. 24; 29 CFR 1910)</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSP-016	<b>RIGHT-TO-KNOW HAZARDOUS CHEMICALS TRAINING PROGRAM RECORDS</b>	Info and Record Copy	District Personnel Office/Local School		<b>PERMANENT</b>	Retain at agency 5 yrs.; transfer to Delaware Public Archives for permanent preservation.  (16 DE Code, Ch. 24; 29 CFR 1910)
	Include dates of training sessions given to employees and list of protective equipment issued to employees handling hazardous chemicals.					
GSP-017	<b>EQUAL EMPLOYMENT OPPORTUNITY COMMISSION EEO5 REPORTS</b>	Info and Record Copy	District Personnel Office		<b>THREE YEARS</b>	Retain current EEO5 report at agency 3 yrs. after submission; destroy. (29 CFR Section 1602.39)
	Collection of employment data of public elementary and secondary school systems and annexes. Include Local School Report (Form 168B or equivalent and related correspondence).					
GSP-018	<b>EMPLOYEE SALARY SCHEDULES</b>	Info and Record Copy	District Personnel Office		<b>PERMANENT</b>	Maintain permanently at agency.
	Documents record employee salary schedules. Include state salary schedule and local supplemental salary schedule.					
	NOTE: State salary schedule (Handbook of Personnel Administration for Delaware School Districts) is updated annually and maintained permanently by Dept. of Education via Delaware Documentation.					

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSP-019</b>	<b>EMPLOYMENT ELIGIBILITY VERIFICATION FORMS (FORM I-9)</b>  Forms establishing citizenship status of new state employees for any person hired after November 6, 1986.	Info and Record Copy	District Personnel Office	CONF.	SEE RETENTION INSTRUCTIONS	Retain at agency 3 yrs. after date of hire, or 1 year after termination of employment, whichever is later; successful audit; destroy. (8 CFR 274a2)
<b>GSP-020</b>	<b>PAR-1 FILES</b>  Contain PAR-1 to establish, transfer, reclassify, change or abolish positions; analyst notes; organizational charts; etc.	Record/Info Copy	District Personnel Office	CONF.	SEE RETENTION INSTRUCTIONS	Retain original in employee personnel file after information has been verified and entered into the PHRST system.  Updated 2010
<b>GSP-021</b>	<b>MEDICAL RECORDS</b>  Documentation of employee's medical conditions, requirements, and circumstances. May include medical reports; testing; i.e. TB testing and results, flu vaccination; physician; hospital and lab billings; correspondence, etc.	Record Copy	District Personnel Office	CONF.	SEE RETENTION INSTRUCTIONS	Retain at agency 50 yrs. after termination; destroy. (29 CFR 1910.1020)  NOTE: If duplicates are maintained in separate locations: Upon termination, forward all documentation to agency personnel office for comparison and purging.
<b>GSP-022</b>	<b>EQUAL EMPLOYMENT OPPORTUNITY (EEO) SHEETS</b>  Tear-off portion of application voluntarily completed by applicants denoting race, birth date, gender, social security number, disabilities and position sought.	Record Copy	District Personnel Office	CONF.	SEE RETENTION INSTRUCTIONS	Retain at agency 1 yr.; destroy.  (29 DE Code, Section 10002; 29 CRF 1620, 1627.3)

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
PERSONNEL RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSP-23	<p><b>ADVERTISING AND RECRUITMENT FILES</b></p> <p>May contain the following but not limited to: copies of published notification sent to the media, individuals and other recruitment services which contain the institution's policy of nondiscrimination, and listing of all advertising and recruitment sources for filling present or future vacant job positions.</p>	<p>Info and Record Copy</p>	<p>District Personnel Office</p>		<p><b>THREE YEARS</b></p>	<p>Retain at agency 3 yrs.; or through final disposition of charges of discrimination or legal action; destroy.</p> <p>Department of Education (DOE-250012 (02/06): Instructions and Procedures for Completion of a Civil Rights On-Site Compliance Review</p> <p>Updated: 2008</p>
GSP-024	<p><b>INTERVIEW DOCUMENTATION</b></p> <p>May contain the following but not limited to: copies of tests, structured interview questions and procedures used for screening applicants, and explanation of scoring process if applied and/or ranked.</p>	<p>Info and Record Copy</p>	<p>District Personnel Office/Local School</p>		<p><b>THREE YEARS</b></p>	<p>Retain at agency 3 yrs. or through final disposition of charges of discrimination or legal action; destroy.</p> <p>Department of Education (DOE-250012(02/06): Instructions and Procedures for Completion of a Civil Rights On-Site Compliance Review</p> <p>Update: 2008</p>

**PURGE LIST  
DEPARTMENTAL PERSONNEL RECORD GSP-004  
TERMINATED EMPLOYEE RECORDS**

<b>TO BE RETAINED</b>	<b>TO BE DISCARDED</b>
<ol style="list-style-type: none"><li>1. One copy of each Personnel Transaction (PT-1) and Personnel Action Request (PAR3, PAR4, and PAR34)</li><li>2. Cumulative yearly attendance and leave record</li><li>3. One copy of application for each position held</li><li>4. Appointment letters/employment notifications</li><li>5. Correspondence pertaining to leave, donated leave, promotions, appointments, etc.</li><li>6. Copy of Social Security card</li><li>7. Security clearances:<ul style="list-style-type: none"><li>Criminal Background checks</li><li>Child Protection Registry</li></ul></li><li>8. Copies of benefits (health insurance, dental, credit union, etc.)</li><li>9. Termination/resignation notice</li><li>10. Pension application</li><li>11. Pension withdrawal form</li><li>12. Employee contract</li><li>13. Last 5 Employee Performance Reviews</li><li>14. Course credits/certifications</li><li>15. Chemical information list</li><li>16. Exit interview</li></ol>	<ol style="list-style-type: none"><li>1. Duplicate PT-1s, PARs</li><li>2. Individual leave requests (not yearly leave record)</li><li>3. W-4 tax form</li><li>4. Wage attachments</li><li>5. Disciplinary actions</li><li>6. Employee reviews prior to the last (5) appraisals</li><li>7. Recommendations/commendations (return to employee)</li></ol> <p>Updated: 2008</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

**STUDENT CUMULATIVE RECORDS**

**TITLE 14 – Education, 200 Administration and Operations**

**252 Required Educational Records and Transfer and Maintenance of Educational Records**

**1.0 Definitions:** The following words and terms, when used in this regulation, shall have the following meaning unless the context states otherwise:

**“Court Orders”** shall mean any written direction from a court of competent jurisdiction directed to the student or affecting the student’s care or custody.

**“Discipline Record”** shall mean information about any and all periods of out of school suspension or of expulsion from the regular school setting imposed on a student as a result of an infraction of the school or district’s code of conduct or other rules.

**“Emergency Treatment Card”** shall mean the card containing the general emergency information and procedures for the care of a student when the student becomes sick or injured in school as required in 14 DE ADMIN CODE 811.1.1

**“Identifying Data”** shall mean the name of the student, date of birth, sex, race/ethnicity, address, telephone number, Delaware student identification number and the name of the parent(s), guardian(s) or Relative Caregiver.

**“Progress Report”** shall mean a single record maintained for each student in kindergarten through grade 8 that contains end of year and up to date grades; standardized test(s) scores such as the DSTP and attendance data for each year of the student’s attendance.

**“School Health Record”** shall mean the form required by 14 DE ADMIN CODE 811.2.0 for Delaware public school students.

**“Student Transcript”** shall mean a single record maintained for each student in grades 9 and above that contains the following: end of year and up to date grades; credits earned; class rank; Grade Point Average (GPA); withdrawal or graduation date; standardized test (s) scores such as the DSTP, SAT, PSAT, ACT; attendance data and school activities. If applicable, a list of the career-technical competencies achieved by a student enrolled in a specific career-technical program shall also be included.

**2.0 Education Records Required by Schools in Delaware**

2.1 Each Delaware school shall maintain a Cumulative Record File either as an electronic or paper file for each student enrolled.

2.1.1 The student Cumulative Record File shall contain the Emergency Treatment Card, Identifying Data, School Health Record, Progress Report, Student Transcript (for students in grades 9 and above) and Discipline Record.

2.1.2 The student Cumulative Record File shall also contain any Court Orders in the school or district’s possession, to the extent the school or district maintains such documents for an individual student.

2.1.3 In addition, the Cumulative Record File for a child with a disability as defined in 14 DE ADMIN CODE 925 shall contain any records related to the identification, evaluation, placement, and provision of a free appropriate public education. Such documents may be collected and maintained separately.

### **3.0 Transfer Of The Records Of Public School And Private Schools Students**

3.1 When a student transfers from a public school, private school or an educational program operated by the Department of Services for Children Youth and Their Families to any other school in Delaware, the receiving school shall immediately request the Cumulative Record File from the sending school or program.

3.2 The Cumulative Record File shall follow each student transferred from one school to another including files for each student with disabilities transferred from one school to another.

3.2.1 Public schools, school districts, private schools and educational programs operated by the Department of Services for Children Youth and Their Families shall promptly transfer a student's Cumulative Record File upon the request of a receiving school.

3.2.2 Unpaid student fees or fines shall not be a basis for a public school, school district or an educational program operated by the Department of Services for Children Youth and Their Families to deny or to delay transfer of the Cumulative Record File.

3.2.3 Students shall not be denied enrollment into a public school on the grounds that the student's Cumulative Record File has not been received.

3.3 Before transferring student records, a public school, school district or private school shall specifically confirm that the Cumulative Record File contains the student's Discipline Record.

3.4 When students transfer to a Delaware school from any other school including a school in a foreign country the receiving school is responsible for having the transcripts evaluated.

### **4.0 Maintenance Of The Education Records Of Public Schools**

4.1 The Delaware School District General Records Retention Schedule published by the Delaware Public Archives shall be followed as to the length of time and special considerations for the maintenance of education records.

4.2 Contracts for storage of student records of graduates, withdrawals and special education students for district storage, shall be initiated between the school district and the Delaware Public Archives.

4.3 The Cumulative Record Files for students who have graduated from or who left school prior to graduation from high school shall be stored at the school or district of last attendance or in the Delaware Public Archives.

### **5.0 Destruction Of Education Records Of Public Schools**

5.1 The Delaware School District General Records Retention Schedule published by the Delaware Public Archives shall be followed as to the length of time and special considerations for the destruction of any education records.

5.2 The destruction of educational records of children with disabilities shall also comply with the requirements of 14 DE Admin Code 925. 8 DE Reg. 1112 (2/1/05)

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS-001	STUDENT CUMULATIVE RECORDS K-12 / TRANSFER, WITHDRAWAL, OR DROP (PUBLIC, CHARTER, VOCATIONAL SCHOOLS)	Record / Info Copy	Local School / Guidance Office	CONF	ONE HUNDRED YEARS	<p>Retain at agency through the end of each school year after transfer, withdrawal, or drop; purge according to approved purge list (Page #71); transfer to Delaware Public Archives for duration of retention period; destroy.</p> <p><b>NOTE: EFFECTIVE 2/2005 HEALTH RECORDS AND DISCIPLINE RECORDS SHALL BE INTERFILED WITH THE STUDENT CUMULATIVE RECORDS AT THE TIME OF GRADUATION OR WITHDRAWAL.</b></p> <p><b>Title 14 Education 200 Administration and Operations 252 Required Educational Records and Transfer and Maintenance of Educational Records</b></p> <p><b>NOTE: FOR THOSE SCHOOLS THAT HAVE NOT TRANSFERRED STUDENT CUMULATIVE RECORDS, HEALTH RECORDS OR DISCIPLINE RECORDS PRIOR TO THE 2004-2005 SCHOOL YEAR, THOSE RECORDS WILL ALSO HAVE TO BE COMBINED BEFORE TRANSFERRING TO THE DELAWARE PUBLIC ARCHIVES.</b></p> <p>Revised 2006</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS- 002	STUDENT CUMULATIVE RECORDS / GRADUATES (PUBLIC, CHARTER, VOCATIONAL SCHOOLS)	Record / Info Copy	Local School /Guidance Office	CONF	ONE HUNDRED YEARS	<p>Retain at agency through the end of each school year after transfer, withdrawal, or drop; purge according to approved purge list (Page #71); transfer to Delaware Public Archives for duration of retention period; destroy.</p> <p><b>NOTE: EFFECTIVE 2/2005 HEALTH RECORDS AND DISCIPLINE RECORDS SHALL BE INTERFILED WITH THE STUDENT CUMULATIVE RECORDS AT THE TIME OF GRADUATION OR WITHDRAWAL.</b></p> <p><b>Title 14 Education 200 Administration and Operations 252 Required Educational Records and Transfer and Maintenance of Educational Records</b></p> <p><b>NOTE: FOR THOSE SCHOOLS THAT HAVE NOT TRANSFERRED STUDENT CUMULATIVE RECORDS, HEALTH RECORDS OR DISCIPLINE RECORDS PRIOR TO THE 2004-2005 SCHOOL YEAR, THOSE RECORDS WILL ALSO HAVE TO BE COMBINED BEFORE TRANSFERRING TO THE DELAWARE PUBLIC ARCHIVES.</b></p> <p>Revised 2006</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSS-003</b>	<b>STUDENT CUMULATIVE RECORDS / VOCATIONAL-TECHNICAL</b>					
	<b>A. Graduates and Withdrawals</b>					<b>NOTE: Use Series #GSS-001 and GSS-002.</b>
	<b>B. Time Share Student Cumulative Records</b>	<b>Record Copy</b>	<b>Vo-Tech</b>	<b>CONF</b>	<b>ONE HUNDRED YEARS</b>	<b>Retain at agency after graduation, transfer, withdrawal or drop; transfer originals to Delaware Public Archives for 100 yrs; destroy.</b>
		<b>Info Copy</b>	<b>Home School</b>	<b>CONF</b>	<b>ONE HUNDRED YEARS</b>	<b>NOTE: The home school only records attendance at Vo-Tech, total credits earned and grade average.</b>
	<b>C. Competency Sheets Individual competency ratings in various areas of skills directly relating to the trade, personal social skill ratings, and grades achieved.</b>	<b>Record Copy</b>	<b>Vo-Tech</b>	<b>CONF</b>	<b>ONE HUNDRED YEARS</b>	<b>Retain at agency after graduation, transfer, withdrawal, or drop; transfer originals to Delaware Public Archives for 100 yrs; destroy.</b>  <b>NOTE: Competency Sheets are not maintained in the cumulative folder nor was the information sent to the home school.</b>
	<b>D. Cosmetology Student Cumulative Records Course credit hours completed by each student.</b>	<b>Record Copy</b>	<b>Vo-Tech</b>	<b>CONF</b>	<b>ONE HUNDRED YEARS</b>	<b>Retain at agency after graduation, transfer, withdrawal, or drop; transfer to Delaware Public Archives for 100 yrs; destroy.</b>
						<b>Revised 2006</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSS-004	<p><b>SPECIAL EDUCATION STUDENT CUMULATIVE RECORD AND AUDIT FILE</b></p> <p>All documentation on students enrolled in Special Education programs. Files may contain the following documents:            Transcripts or grades completed, health records, medical evidence, emergency treatment data card/form, referral forms, parental/guardian/relative caregiver consent, testing results, Individualized Education Program (IEP), support documentation, IEP team minutes, psychological reports, hearing and vision test results, classroom observation, re-evaluation data, eligibility meeting minutes, notice of meetings, evaluation reports and dismissal form.</p>	Record Copy	Local School	CONF.	ONE HUNDRED YEARS	<p>Retain at agency 3 yrs after graduation, transfer, or withdrawal, attaining the age of 21 or termination of service; successful federal audit; notify parents/guardian/relative caregiver or students (18 or older); purge according to approved purge list, (located at the end of the Student Records section); transfer to Archives for 97 yrs; destroy.</p> <p>34CFR 76.730 and 731</p> <p>NOTE: When grant support is continued or renewed at annual or other intervals, the retention period for the records of funding period starts on the day grantee or sub-grantee submits to the awarding agency its single or last expenditure report for that period. However, if grant support is continued or renewed quarterly, the retention period for each year's records starts on the day the grantee submits its expenditure report for the last quarter of the federal fiscal year. In all other cases the retention period starts on the day the grantee submits its final expenditure report. If an expenditure report has been waived, the retention period starts on the day the report would have been due.</p> <p>34CFR Subtitle A Section 80.42</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS-004	SPECIAL EDUCATION STUDENT CUMULATIVE RECORD AND AUDIT FILE (cont.)	Record Copy	Local School	CONF.	ONE HUNDRED YEARS	<p><b>NOTE: EFFECTIVE 2/2005 TRANSCRIPTS/GRADES, HEALTH RECORDS, DISCIPLINE SHALL BE INTERFILED WITH THE STUDENT'S SPECIAL EDUCATION FILE AT THE TIME OF GRADUATION, WITHDRAWAL OR TRANSFER.</b></p> <p><b>Title 14 – Education, 200 Administration and Operations, 252 Required Educational Records and Transfer and Maintenance of Educational Records. 34CFR Subsection 300.576</b></p> <p><b>NOTE: THOSE SCHOOLS THAT HAVE NOT TRANSFERRED SPECIAL EDUCATION STUDENT RECORDS PRIOR TO THE 2004-2005 SCHOOL YEAR WILL ALSO BE REQUIRED TO INTERFILE THE HEALTH RECORDS, TRANSCRIPTS/GRADES AND DISCIPLINE IN THE STUDENT'S SPECIAL EDUCATION FILE BEFORE TRANSFERRING TO THE DELAWARE PUBLIC ARCHIVES. IF TRANSCRIPTS/GRADES WERE SUBMITTED PREVIOUSLY VIA REGULAR GRADUATE RECORDS OR WITHDRAWAL RECORDS, THE AUDIT FILE SHOULD STILL BE PREPARED FOR TRANSFER TO THE DELAWARE PUBLIC ARCHIVES. TRANSCRIPTS/GRADES, HEALTH RECORDS AND DISCIPLINE RECORDS PREVIOUSLY TRANSFERRED AND STORED AT THE DELAWARE PUBLIC ARCHIVES UNDER THE 25 YEAR RETENTION FOR HEALTH RECORDS, AND 50 YEAR RETENTION FOR DISCIPLINE, WILL BE RETAINED FOR THE TOTAL 100 YEARS.</b></p> <p><b>Updated 2010</b></p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS-004A	<b>STUDENT SPEECH FILES</b>  <b>Information documented on students enrolled in speech therapy. Includes a file on each student, which may contain the following: referral forms, parental/guardian/relative caregiver consent, testing results, Individual Evaluation Program (IEP).</b>	Record Copy	Local School	CONF.	<b>THREE YEARS AFTER CLOSE OF CASE; SUCCESSFUL AUDIT</b>	<b>Retain at agency 3 yrs after close of case; successful federal audit; destroy.</b>  <b>Updated 2010</b>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSS-004B	<p><b>DAPA (DELAWARE ALTERNATE PORTFOLIO ASSESSMENT)</b></p> <p>Special education student testing files of those students that are not tested under the standard Delaware Student Testing Program (DSTP or current Student Assessment) and used as an alternate method for an assessment tool, with the intention of the portfolio to assist with continuity of programming from year to year as well as assist with IEP (Individualized Education Program) development.</p> <p>Note: These files (DAPA) have been scored by DOE (Department of Education) and returned to the local schools.</p>	Record Copy	Local School	CONF.	SEE RETENTION INSTRUCTION	<p>1) DOE sends three copies of the score report for the portfolio to the schools at the same time. The school's score report should be placed in the student's cumulative record, the parent's score report should be sent to the parent, and the teacher's score report should remain with the portfolio. The district no longer receives individual score reports. A score summary of the DAPA will be sent to the districts.</p> <p>2) Appeal Process: A) Not Appealed: the portfolio contents (including the teacher's score report) should be given to the educator who will be working with the student the following year. B) Appealed: the portfolio is returned to the State (DOE) with the completed appeal form. When the appeal process is completed, it will be returned to the educator who submitted the appeal request. Within two weeks, the portfolio (including the teacher's score report) should be given to the child's current teacher.</p> <p>3) At the IEP meeting following the return of the scored portfolio, the portfolio should be used to assist in evaluating progress, develop IEP objectives that are linked to the Delaware Content Standards, and discuss objectives to be used for the next portfolio. At the conclusion of this IEP meeting, the school should inform the parent(s)/guardians/relative caregiver, that the portfolio is no longer needed to provide education services and they may take it home.</p> <p>(IDEA regulations, 34CFR subsection 300.573)</p> <p>Updated 2010</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSS-005	<p><b>STUDENT SCHOOL HEALTH RECORD</b></p> <p>Record of all health data. Contains the following information: Student name, parents, family physician, dentist, school attending, any illness or health problems, injuries, immunization record, vision testing, hearing testing, referral and tests, physical examination, conferences, long term medication, and student health history update.</p>	Info and Record Copy	Local School	CONF.	ONE HUNDRED YEARS	<p>See Series GSS-001, 002, 003 and 004 for health records retention.</p> <p><b>NOTE: EFFECTIVE 2/2005 HEALTH RECORDS SHALL BE INTERFILED WITH THE STUDENT CUMULATIVE RECORDS AT THE TIME OF GRADUATION, WITHDRAWAL OR TRANSFER.</b></p> <p>Title 14 -Education, 200 Administration and Operations, 252 Required Educational Records and Transfer and Maintenance of Educational Records.</p> <p><b>NOTE: THOSE SCHOOLS THAT HAVE NOT TRANSFERRED STUDENT CUMULATIVE RECORDS, AND HEALTH RECORDS PRIOR TO THE 2004-2005 SCHOOL YEAR WILL ALSO BE REQUIRED TO INTERFILE THE HEALTH RECORDS WITH THE STUDENT CUMULATIVE RECORDS BEFORE TRANSFERRING TO THE DELAWARE PUBLIC ARCHIVES. STUDENT HEALTH RECORDS PREVIOUSLY STORED AT THE DELAWARE PUBLIC ARCHIVES UNDER THE 25 YEAR RETENTION WILL BE RETAINED FOR THE 100 YEARS. Updated 2010</b></p>
GSS-006	<p><b>PSYCHOLOGICAL PROCEDURE FILES</b></p> <p>Reference materials relating to performing psychological evaluations of students.</p>	Info and Record Copy	Local School	CONF.	UNTIL UPDATED	<p>Retain at agency until updated; destroy.</p> <p>Update 2010</p>
GSS-007	<p><b>STUDENT EDUCATIONAL PROFILE</b></p> <p>Documents relate to determining need for</p>	Info and Record	Local School	CONF.	SEE RETENTION INTRUCTIONS	<p>Retain at agency. If student is placed in Special Ed Program, file in Special Ed student cumulative folder (Series GSS-004). If student is not placed in</p>

	psychological evaluation of students.	Copy				Special Ed, retain 3 yrs.; destroy.
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**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS-008	<p><b>PSYCHOLOGICAL STUDENT REPORT FILE</b></p> <p>Documentation of psychological evaluations of students referred for testing. File may contain the following: parental, guardian, relative caregiver permission; referrals, and report of results.</p>	Info and Record Copy	Local School	CONF.	SEE RETENTION INSTRUCTIONS	<p>Retain at agency. If student is placed in Special Education Program, file in Special Ed student cumulative folder (Series GSS-004). If student is not placed in Special Ed, retain 3 yrs; destroy.</p> <p>Updated 2010</p>
GSS-009	<p><b>NURSES DAILY LOG</b></p> <p>Documentation of all health room visits involving illness or injury for each student when the school nurse has administered care. File may contain the following: name of student, grade, teacher, time in, time out, complaint/treatment, disposition, screening, physical exams, parent, guardian, relative caregiver conferences, daily medication sheets/logs, eye, hearing, and vision screening test, and any presentations made by the nurse.</p>	Info and Record Copy	Local School	CONF.	TWENTY-FIVE YEARS	<p>Hard Copy Files; Retain at agency 2 yrs; transfer to State Records Center for 23 yrs; destroy.</p> <p>NOTE: Electronic data maintained via E-School Plus will be retained in electronic format and maintained by the district and Department of Education (Technology Resources and Data Development).</p> <p>Updated 2010</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS-010	<p><b>EMERGENCY TREATMENT DATA CARD/FORM</b></p> <p>Card/form completed by parent, guardian or relative caregiver for notification in case of emergency. Parent, guardian or relative caregiver consent for treatment, surgery, diagnostic procedures, etc., in the event that parent, guardian or relative caregiver cannot be reached. Renewed annually.</p>	Info and Record Copy	Local School	CONF.	ONE HUNDRED YEARS	<p>See Series GSS-001, 002, 003 and 004 for health records retention.</p> <p><b>NOTE: EFFECTIVE 2/2005 MOST CURRENT EMERGENCY TREATMENT DATA CARD/FORM SHALL BE INTERFILED WITH THE STUDENT CUMULATIVE RECORDS AT THE TIME OF GRADUATION, WITHDRAWAL OR TRANSFER.</b></p> <p>Title 14 – Education, 200 Administration and Operations, 252 Required Educational Records and Transfer and Maintenance of Educational Records.</p> <p><b>NOTE: THOSE SCHOOLS THAT HAVE NOT TRANSFERRED STUDENT CUMULATIVE RECORDS AND HEALTH RECORDS PRIOR TO THE 2004-2005 SCHOOL YEAR WILL ALSO BE REQUIRED TO INTERFILE THE HEALTH RECORDS PREVIOUSLY STORED AT THE DELAWARE PUBLIC ARCHIVES UNDER THE 25 YEAR RETENTION. THEY WILL BE RETAINED FOR THE 100 YEARS.</b> Updated 2010</p>
GSS-011	<p><b>DUE PROCESS HEARING OR COMPLAINT FILES</b></p> <p>Documents relate to requesting a due process hearing and includes summary of evidence, hearing transcript decision of hearing officer and related papers.</p>	Info Copy  Record Copy	District Office/ Local School  Dept. of Education	CONF.	FIVE YEARS AFTER GRADUATION TRANSFER OR WITHDRAWAL  TWENTY-FIVE YEARS	<p>Retain at agency 5 yrs after graduation, transfer, or withdrawal; destroy.</p> <p>(34CFR 76.734)</p> <p>Updated 2010</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSS-012	<p><b>STUDENT DISCIPLINE RECORD</b></p> <p>A. Information about any and all periods of out of school suspension or of expulsion from the regular school setting imposed on a student as a result of an infraction of the school or district's code of conduct or other rules.</p>	Info and Record Copy	Local School/ District Office	CONF.	ONE HUNDRED YEARS	<p>See Series GSS-001, 002, 003 and 004 for discipline records retention.</p> <p><b>NOTE: EFFECTIVE 2/2005 DISCIPLINE RECORDS SHALL BE INTERFILED WITH THE STUDENT CUMULATIVE RECORDS AT THE TIME OF GRADUATION, WITHDRAWAL OR TRANSFER.</b></p> <p>Title 14 Education 200 Administration and Operations 252 Required Educational Records and Transfer and Maintenance of Educational Records.</p> <p><b>NOTE: FOR THOSE SCHOOLS THAT HAVE NOT TRANSFERRED STUDENT CUMULATIVE RECORDS, AND DISCIPLINE RECORDS PRIOR TO THE 2004-2005 SCHOOL YEAR, WILL ALSO BE REQUIRED TO INTERFILE THE DISCIPLINE RECORDS WITH THE STUDENT CUMULATIVE RECORDS BEFORE TRANSFERRING TO THE DELAWARE PUBLIC ARCHIVES. STUDENT DISCIPLINE RECORDS PREVIOUSLY STORED AT THE DELAWARE PUBLIC ARCHIVES UNDER THE 50 YEAR RETENTION WILL BE RETAINED FOR THE 100 YEARS. Revised 2006</b></p>
	<p><b>B. NON-OUT OF SCHOOL SUSPENSION</b></p> <p>Non-Mandatory reporting offenses/infractions. In-School suspension or detention.</p>	Info and Record Copy	Local School	CONF.	ONE YEAR	<p>Retain at agency 1 yr.; destroy.</p> <p>Revised 2006</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSS-013</b>	<b>GRADUATE, CLASS RANKING, AND DROPOUT LISTS</b>  Includes documents listing graduates (sometimes by class ranking) and dropouts.	<b>Info and Record Copy</b>	<b>Local School/ District Office</b>	<b>CONF.</b>	<b>PERMANENT</b>	<b>Retain at agency 2 yrs after graduation, transfer, or withdrawal; transfer to Archives for permanent preservation.</b>  <b>Updated 2010</b>
<b>GSS-014</b>	<b>STUDENT EARLY RELEASE, TARDINESS AND ABSENCE FROM SCHOOL</b>  Documentation relating to and verifying absence, tardiness or early release of students during normal operating day. i.e. medical, work, etc. May include related correspondence, parent, guardian or relative caregiver notes/authorized list of people eligible to pick up student from school, log sheets, weather contingency forms for alternate transportation, and any other documents verifying absence.	<b>Info and Record Copy</b>	<b>Local School</b>	<b>CONF.</b>	<b>THREE YEARS</b>	<b>Retain at agency 3 yrs; destroy.</b>  <b>Updated 2010</b>
<b>GSS-015</b>	<b>STUDENTS SCHOLASTIC APTITUDE</b>  Files relate to administering the SAT to high school seniors planning to attend college and usually includes a summary report, comparative listing, and explanatory information.	<b>Info Copy</b>  <b>Record Copy</b>	<b>District Office/Local School</b>  <b>Dept. of Education</b>		<b>FOUR YEARS</b>  <b>PERMANENT</b>	<b>Retain at agency 4 yrs; destroy.</b>  <b>NOTE: Individual test scores (See Student Cumulative Record Series #GSS-001, 002, 003, 004)</b>
<b>GSS-016</b>	<b>STANDARDIZED ACHIEVEMENT TEST FILE</b>  Documents relate to administering tests and comparing results and student performance. Includes procedures for	<b>Info and Record Copy</b>	<b>Local School/ District Office</b>		<b>UNTIL UPDATED</b>	<b>Retain at agency until updated; destroy.</b>

	administering the test, summary data for each school and the school system. Also included may be briefing materials such as overhead transparencies.					
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**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS-017	<p><b>STUDENT COUNSELING CONFIDENTIAL FILES</b></p> <p>Documents relate to counseling students and include personal documents useful for that purpose such as test results, information about students (family, hobbies, goals, and aspirations), correspondence, and related documents.</p>	Info and Record Copy	Local School	CONF.	TWO YEARS AFTER GRADUATION, TRANSFER, OR WITHDRAWAL	Retain at agency 2 yrs. after graduation, transfer, or withdrawal; destroy.
GSS-018	<p><b>SCHOOL SOCIAL WORKER (VISITING TEACHER) CASE FILES</b></p> <p>Documents relate to referring and correcting problems of excessive student absenteeism. Includes referral form, notes, memos, related information showing current status, and related correspondence.</p>	Info and Record Copy	Local School	CONF	SEE RECOMMENDED ACTION	<p>Retain at agency 2 yrs. after graduation, transfer, or withdrawal; destroy.</p> <p>NOTE: If a student transfers to another school in the system, transfer to receiving school social worker.</p>
GSS-019	<p><b>STUDENT GRADE DISTRIBUTION AND FAILURE REPORT FILE</b></p> <p>Document relating to reporting student grades and attendance to schools for diagnostic and monitoring purposes.</p>	Info and Record Copy	Local School/ District Office		THREE YEARS	Retain at agency 3 yrs.; destroy.

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSS-020	<p><b>DELAWARE MEDICAL ASSISTANCE PROGRAM (DMAP) / CHILDREN'S SERVICES COST RECOVERY PROJECT (CSCR)</b></p> <p>Documents that substantiate a Medicaid claim for items and services rendered to eligible Medicaid recipients. These files must contain the following minimum information: Date of service, individual's Name, treatment/services rendered, specific amount, duration and type of service provided by a qualified professional/clinician and practitioner's signature.</p>	Info And Record Copy	Local School / Cost Recovery Specialist	CONF	FIVE YEARS	<p>Retain at agency 5 yrs; destroy.</p> <p>Division of Social Services Certification and Policy Manual Provider Contract Title XIX of the Social Security Act</p> <p>Revised 2006</p>
GSS-021	<p><b>COOPERATIVE EMPLOYMENT STUDENT RECORDS</b></p> <p>Documentation on cooperative program. Contains Work Papers, Training Agreements, and Job Site Evaluations.</p>	Info and Record Copy	Local School	CONF.	SEE RETENTION INSTRUCTIONS	<p>Retain at agency through end of school year after graduation, withdrawal or transfer; destroy.</p> <p>Perkins Law 29CFR 570 Subpart G Fair Labor Standards Act, Child Labor Laws.</p>
GSS-022	<p><b>JAMES H. GROVES ADULT HIGH SCHOOL CUMULATIVE RECORDS</b></p>					<p>Replaced by AEWD-001.</p> <p>Adult basic education program student records now under Dept. of Education/Adult Education &amp; Workforce Development</p> <p>Revised 2008</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GSS-023</b>	<p><b>IN SCHOOL CREDIT PROGRAM (ALTERNATIVE PROGRAM)</b></p> <p>Adult Education program that offers students an alternative to earning needed credits to be eligible for graduation from their home school. They attend home school during the day and attend In School Credit program in addition to the home school classes. May contain the following documents: Registration Form, Attendance, course documentation and grades. Grades only are sent to the home school.</p>	<b>Info and Record Copy</b>	<b>Adult Education</b>	<b>CONF</b>	<b>ONE HUNDRED YEARS</b>	<b>Retain at agency through the end of each school year after graduation, transfer, withdrawal, or drop; transfer to State Records Center for 100 yrs.; destroy.</b>
<b>GSS-024</b>	<p><b>SCHOOL CHOICE APPLICATION FILES</b></p> <p>Files may contain the following: Application, notice to district of residence, and related correspondence.</p>					
	<b>A. Approved Application Files</b>	<b>Info and Record Copy</b>	<b>Local School/ District Office</b>	<b>CONF</b>	<b>SEE RETENTION INSTRUCTIONS</b>	<b>Retain at school of choice and school of residence for 2 yrs, or until student graduates, transfers or withdraws; destroy.</b>
	<b>B. Disapproved Application Files</b>	<b>Info And Record Copy</b>	<b>Local School/ District Office</b>	<b>CONF</b>	<b>ONE YEAR OR UNTIL NEXT SUBMISSION DEADLINE</b>	<p><b>Retain at school of residence for 1 yr, or until next submission deadline; destroy.</b></p> <p><b>DE Code Title 14 Education Part I Free Public Schools</b></p>

						Chapter 4 §401-414 Revised 2006
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**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
GSS-025	<p><b>504 ACCOMMODATION PLANS</b></p> <p>Accommodations of individual student needs that have met the classification as a qualified handicapped individual under section 504 of the Rehabilitation Act of 1973. Plans may include but not limited to the following: Physical arrangements of room, lesson presentation, assignments /worksheets, testing, organization, behaviors, medication, special considerations, discipline, name of participants and case manager. Students qualified for accommodations may or may not be in Special Education.</p>	Info and Record Copy	Local School	CONF	SEE RETENTION INSTRUCTIONS	<p>Retain at agency through the end of each school year after graduation, transfer or withdrawal; file in Student Cumulative Record. (See Student Cumulative Record Series GSS-001, 002, 003, 004).</p> <p>Revised 2006</p>
GSS-026	<p><b>CAREER TRAINING RECORDS</b></p> <p>Programs funded through Job Training Partnership Act (JTPA), Perkins and Workforce Investment Act (WIA). These records include student academic progress, employment data and program eligibility certification. Also contained are the following: total hours of attendance, final grades, and certificate of program completion.</p>	Info and Record Copy	Local School	CONF	ONE HUNDRED YEARS	<p>Retain at agency 3 yrs after completion; transfer to State Records Center for 97 yrs; destroy.</p> <p>Revised 2006</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSS-027	<p><b>APPRENTICESHIP AND TECHNICAL TRAINING STUDENT RECORDS</b></p> <p>Apprenticeship training is a formal system of acquiring the skills required for a particular occupation. Participants are signatory to a three way agreement between the Department of Labor, their (sponsor), and themselves (apprentice). In addition to receiving 2,000 hours per year of supervised hands on training, the apprentices are required to attend school for a minimum of 144 hours per year. Trade Extension classes are available to adult students who wish to take courses necessary to meet their individual needs. Trade Extension students often attend the apprenticeship classes, but many enroll in specialized certificate programs designed to be short-term and target specific. The Vocational section of the Adult Education Division offers more than 70 different courses ranging from 60 to 200 hours per year. Student records may contain the following documents but not limited to: student name, Trade or Vocational area studied, attendance, enrollment information and grades and documentation of hours.</p>	Info and Record Copy	Local School	CONF / VITAL	ONE HUNDRED YEARS	<p>Retain at agency 3 yrs. after completion; transfer to State Records Center for 97 yrs; destroy.</p> <p>Approved: June 2008</p> <p>Note: This retention applies to New Castle County Vo-Tech School District, Polytech School District and Sussex Vo-Tech School District.</p>

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
STUDENT RECORDS**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GSS-028	<p><b>RELATIVE CAREGIVERS' SCHOOL AUTHORIZATION RECORDS</b></p> <p>The purpose of the creation of these documents is to establish delegation of power for relative caregivers to register minors for school, providing consent in those cases where the student is being cared for by an adult relative caregiver without legal custody or guardianship. The file may contain the following documents: Relative Caregivers' School Authorization Affidavit, copies of letter/notice sent to parents, custodian, or guardian along with certified mail receipt, documentation of proof of relationship and proof of care giving.</p>	Info and Record Copy	Local School/District Office	CONF	TWO YEARS	<p>Retain at agency 2 yrs; destroy.</p> <p><b>Note:</b> Caregivers' School Authorizations filed prior to January 1 shall be honored for the balance of the current school year and for the subsequent school year. Caregivers' School Authorizations filed on or after January 1 shall be honored for the balance of the current school year and for the two subsequent school years. In either case, the authorization shall expire on August 1 of the applicable school year unless the caregiver receives permission from the school district to extend the length of time that the authorization will be honored. Caregivers' School Authorizations may be cancelled at any time if the minor stops living with the relative caregiver or upon written revocation of the authorization by the child's caregiver, parent, legal custodian or guardian.</p> <p>14 DE Code Chapter 2, Subsection 202</p> <p>Updated 2010</p>
GSS-029	<p><b>UNIFORM ASSISTANCE RECORDS</b></p> <p>The purpose of the creation of these documents is to establish monetary assistance in purchasing required school uniforms for those students that qualify for the program. File may contain the</p>	Info and Record Copy	Local School/District Office		FIVE YEARS	<p>Retain at agency 5 yrs; successful audit; destroy.</p> <p>Updated 2010</p>

	<p>following documentation: application, required documentation and approval letter.</p>					
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**PURGE LIST  
STUDENT CUMULATIVE RECORDS  
SERIES # GSS-001, GSS-002, GSS-003**

**ITEMS TO BE RETAINED FOR STORAGE PER: TITLE 14 – EDUCATION; 200 ADMINISTRATION AND OPERATION; 252 REQUIRED EDUCATIONAL RECORDS AND TRANSFER AND MAINTENANCE OF EDUCATIONAL RECORDS.**

1. **Identifying Data:** shall mean the name of student, date of birth, sex, race/ethnicity, address, telephone number, Delaware Student Identification number, and name of parent(s), guardian(s), or relative caregiver
2. **Student Transcript:** shall mean a single record maintained for each student in grades 9 and above that contains the following: end of year and up to date grades; credits earned; class rank; Grade Point Average (GPA); graduation or withdrawal date; standardized test(s) scores such as the DSTP (or current student assessment scores), SAT, PSAT, ACT. If applicable, a list of career-technical competencies achieved by a student enrolled in a specific career-technical program shall also be included, plus attendance data (end of year) for each year of the students attendance.
3. **Emergency Treatment Card/Form (most current)**
4. **School Health Record:** shall mean the form required by 14 DE Admin Code 811.2.0 for the DE public school student
5. **Progress Report (a single record maintained for each student in kindergarten through grade 8 that contains end of year grades; standardized test(s) scores such as the DSTP (or current student assessment scores), attendance data(end of year) for each year of the students attendance.**
6. **Discipline Record:** shall mean information about any and all periods of out of school suspension or of expulsion from the regular school setting imposed on a student as a result of an infraction of the school or district’s code of conduct or other rules.
7. **Court Orders**
8. **Early College Admission**
9. **Alternative/Option Education documentation**

**Note: Effective 2/2005 Transcripts/Grades, Health Records, Attendance and Discipline shall be interfiled with the student cumulative record at the time of graduation, withdrawal or transfer prior to transferring to the Delaware Public Archives for storage.**

**Purged records are defined as those records which are not absolutely essential for conduction or continuing business after records become inactive; can be destroyed in accordance with Delaware Public Archives destruction procedures.**

**Updated 2010**

**PURGE LIST  
SPECIAL EDUCATION STUDENT AUDIT FILES  
RECORD SERIES #GSS-004**

**ITEMS TO BE RETAINED FOR STORAGE AFTER FOLLOWING MINIMUM RETENTION REQUIREMENTS:**

- 1. SPECIAL EDUCATION AUDIT FILE FACT SHEET (This Fact Sheet would only appear in newly created files, therefore; the information contained on the Fact Sheet should be contained in the older files in various documents which would be retained for storage). The Fact Sheet contains the following information:**
  - **Name**
  - **Address at time of exit from school**
  - **Telephone Number at time of exit from school**
  - **Birth Date**
  - **Student ID Number (if applicable)**
  - **Date and age of entry into Special Education**
  - **Disability classification(s) for Special Education**
  - **High School Diploma or Certificate**
  - **Education History (Name of School/Program, Grade, Date Attended)**
  - **Related Service History Dates**
- 2. IEP Information and Evaluation Information (Final 3 years)**
- 3. Transcripts or Grades completed**
- 4. Health Records**
- 5. Medical Evidence**
- 6. Current Emergency Treatment Data Care/Form**
- 7. Testing Results**
- 8. IEP Team Minutes**
- 9. Psychological Reports**
- 10. Eligibility Meeting Minutes**
- 11. Evaluation Reports**
- 12. Dismissal Form**

**Note: Effective 2/2005 Transcripts/Grades, Health Records, and Discipline shall be interfiled with the student's special Education Audit File at the time of graduation, withdrawal or transfer prior to transferring to the Delaware Public Archives for storage.**

**Purged records are defined as 1) those records which are not absolutely essential for conduction or continuing business after records become inactive or 2) after records become inactive, approved retention period for the audit file containing these documents has been met. Reminder: complete record must be maintained at the agency for three years in accordance with 34CFR Section 76.730 and Section 76.731.**

**Revised 2009**

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
TRANSPORTATION**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GST-001</b>	<b>DELAWARE SCHOOL BUS ACCIDENT REPORT SUMMARY</b>	Info Copy	District Office		<b>TEN YEARS</b>	<b>Retain at agency 10 yrs; (except in cases of personal injury: See note); destroy. NOTE: In cases of personal injury, retain 25 yrs; destroy.</b>
	Documents accidents involving school vehicles. Contains details, police reports (if applicable) personal injury reports.	Info Copy	Dept. of Education		<b>PERMANENT</b>	
	A. State of Delaware Uniform Traffic Collision Report	Info Copy	State Police	<b>CONF</b>	<b>TEN YEARS</b>	
<b>GST-002</b>	<b>BUS ROUTES</b>	Info and Record Copy	District Office/Local School		<b>TWO YEARS</b>	<b>Retain at agency 2 yrs; destroy.</b>
<b>GST-003</b>	<b>FIELD TRIP REQUEST FILES</b>	Info and Record Copy	District Office/Local School		<b>THREE YEARS</b>	<b>Retain at agency for 3 yrs; destroy.</b>
	Documents relate to obtaining permission to take students on trips (school systems or private transportation may be used). Usually includes a standardized form showing purpose of trip, date, destination, and approval/disapproval.					
	A. Field Trip Parental Permission Forms	Info and Record Copy	Local School		<b>THREE YEARS</b>	<b>Retain at agency for 3 yrs.; destroy.</b> <b>Updated: 2008</b>
<b>GST-004</b>	<b>REQUISITION TO USE SCHOOL BUS</b>	Info and Record Copy	District Office/Local School		<b>THREE YEARS</b>	<b>Retain at agency 3 yrs; destroy.</b>
	A recording initiated by schools requesting a school bus and driver for a special trip. File usually reflects the date, time, destination, purpose and estimated cost of the trip; related correspondence may also be included.					

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
TRANSPORTATION**

SERIES NO.	SERIES TITLE AND DESCRIPTION	COPY	LOCATION	CONF.	TOTAL RETENTION	RETENTION INSTRUCTIONS
GST-005	TRANSPORTATION CONTRACTS	Info and Record Copy	District Office		TWELVE YEARS OR UNTIL EXPIRATION OF CONTRACT	Retain at agency 12 yrs.; or until expiration of contract; destroy.
	Contains contracts between school/school districts and outside bus companies.					
	A. SCHOOL BUS CONTRACT ADDENDA					
	School Districts create school bus contract addenda in the Pupil Transportation System and forward to Department of Education (DOE) for approval and funding. Information contained may include contract data, school bus information and route mileage.					Updated: 2008
GST-006	TRANSPORTATION ANALYSIS REPORT	Info Copy	District Office		FIVE YEARS	Retain at agency 5 yrs.; destroy.
	Annual Financial Report on Bus Service provided by the districts. Reflects expenditures, individual buses identified by contract number, school year, trips, number of pupils (kindergarten, grades K-12, Vo-Tech, and Special Schools.	Record Copy	Dept. of Education		PERMANENT	Updated: 2008
GST-007	SCHOOL BUS EVACUATION DRILL REPORT	Info and Record Copy	District Office		FIVE YEARS	Retain at agency 5 yrs; destroy.
	Annual report of procedures and results of Bi-annual evacuation drills reflecting dates that drills were held, number of student participants and instructions for conducting school bus emergency evacuation drills. Report is submitted to DOE.		Dept. of Education		FIVE YEARS	Updated: 2008

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
TRANSPORTATION**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GST-008</b>	<b>BUS DRIVER FILES</b>  Required medical documents and substance abuse evaluations on each bus driver. Maintained and renewed at district annually.	Info and Record Copy	District Office	CONF	<b>FIFTY YEARS AFTER TERMINATION</b>	Retain at agency 3 yrs. after termination; successful audit; transfer to Delaware Public Archives for 47 yrs.; destroy.  Updated: 2008
<b>GST-009</b>	<b>TRANSPORTATION CHANGE FORMS</b>  Documentation of changes made to original pick up location of students riding buses for transportation to and from school. May contain the following information; date, school, student name, address, grade, new, move, school transfer, etc., location of dwelling, daycare information, including location, all information on Bus Number if different in AM from PM, contractor name, change computer and effective date.	Info and Record Copy	District Office	CONF	<b>TWO YEARS</b>	Retain at agency 2 yrs.; destroy.  Updated: 2008
<b>GST-010</b>	<b>ANNUAL MILES TRAVELED</b>  District Report containing school bus route mileage by district and contractor school buses. Report submitted to DOE for annual comparisons and budget.	Info Copy	District Office		<b>SEE RETENTION INSTRUCTIONS</b>	Retain at agency until summarized report has been published; destroy.
	<b>ANNUAL MILES TRAVELED SUMMARIZED REPORT</b>	Record Copy	Dept. of Education		<b>PERMANENT</b>	Updated: 2008

**SCHOOL DISTRICT GENERAL RECORDS RETENTION SCHEDULE  
TRANSPORTATION**

<b>SERIES NO.</b>	<b>SERIES TITLE AND DESCRIPTION</b>	<b>COPY</b>	<b>LOCATION</b>	<b>CONF.</b>	<b>TOTAL RETENTION INSTRUCTIONS</b>	<b>RETENTION INSTRUCTIONS</b>
<b>GST-011</b>	<b>LENGTH OF RIDE FOR SPECIAL SCHOOLS</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SEE RETENTION INSTRUCTIONS</b>	<b>Retain at agency until summarized report has been published; destroy.</b>
	<b>District report containing the number of school bus routes exceeding one hour. Report submitted to DOE for Annual Summarized Report.</b>					
	<b>LENGTH OF RIDE FOR SPECIAL SCHOOLS</b>	<b>Record Copy</b>	<b>Dept. of Education</b>		<b>PERMANENT</b>	
<b>GST-012</b>	<b>NUMBER OF ELIGIBLE TRANSPORTED STUDENTS</b>	<b>Info Copy</b>	<b>District Office</b>		<b>SEE RETENTION INSTRUCTIONS</b>	<b>Retain at agency until summarized report has been published; destroy.</b>
	<b>District report containing number of transported eligible students, district name and name of transportation supervisor. Report is submitted to DOE for Annual Summarized Report.</b>					
	<b>NUMBER OF ELIGIBLE TRANSPORTED STUDENTS SUMMARIZED REPORT</b>	<b>Record Copy</b>	<b>Dept. of Education</b>		<b>PERMANENT</b>	