

STATE OF MICHIGAN
RECORDS MANAGEMENT SERVICES

Records Retention and Disposal Schedule for Michigan Public Schools



Photo of a school in Montague, Michigan, 1912, courtesy of the Archives of Michigan, Lansing.

Approved December 7, 2010

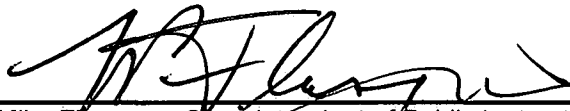


Records Management Services
3400 N. Grand River Ave.
Lansing, Michigan 48909
(517) 335-9132

<http://www.michigan.gov/recordsmanagement/>

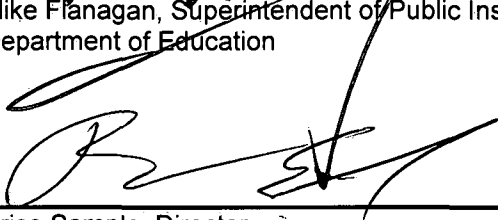
GENERAL SCHEDULE #2 – Michigan Public Schools.

This Retention and Disposal Schedule covers records that are commonly maintained by public school districts. This schedule updates and revises the schedule that was approved on September 5, 2006. The records that are described on the attached pages are deemed necessary (1) for the continued effective operation of Michigan government, (2) to constitute an adequate and proper recording of its activities, and (3) to protect the legal rights of the government of the State of Michigan and of the people. We, the undersigned, believe that this schedule meets the administrative, legal, fiscal and archival requirements of the State of Michigan.



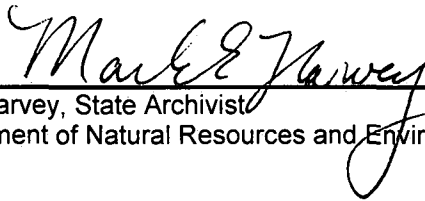
Mike Flanagan, Superintendent of Public Instruction
Department of Education

10/22/10
(Date)



Brice Sample, Director
Department of Technology, Management and Budget, Records Management Services

10/8/10
(Date)



Mark Harvey, State Archivist
Department of Natural Resources and Environment, Archives of Michigan

11/12/10
(Date)

APPROVED

State Administrative Board

12/7/2010
(Date)

GENERAL RETENTION SCHEDULE #2 MICHIGAN PUBLIC SCHOOLS INTRODUCTION

Public Records

The Michigan Freedom of Information Act (FOIA) ([MCL 15.231-15.246](#)) defines public records as recorded information “prepared, owned, used, in the possession of, or retained by a public body in the performance of an official function, from the time it is created.”

Retention and Disposal Schedules

Michigan law (MCL [399.811](#) and [750.491](#)) requires that all public records be listed on an approved Retention and Disposal Schedule that identifies the minimum amount of time that records must be kept to satisfy administrative, legal, fiscal and historical needs. Local situations may require retention beyond the periods listed, and nothing prevents a school district from retaining records longer than the specified period of time. Schedules also identify when records may be destroyed, and when certain records can be sent to the Archives of Michigan for permanent preservation. *Records cannot be destroyed unless their disposition is authorized by an approved Retention and Disposal Schedule.* All schedules are approved by the Records Management Services, the Archives of Michigan and the State Administrative Board. There are two types of schedules that government agencies may use:

- A “general schedule” will cover records that are common to a particular type of government agency, such as a school district. General schedules may not address every single record that a particular agency may have in its possession. *General schedules do not mandate that any of the records listed on the schedule be created.* However, if they are created in the normal course of business, the schedule establishes a minimum retention period for them.
- Any record that is not covered by a general schedule must be listed on an “agency-specific schedule” that will address records that are unique to a particular government agency. Agency-specific schedules always supersede general schedules. Agency-specific schedules only address the records of the agency named on the schedule, and may not be used by another agency.

Unofficial Documents

General Schedule #1 addresses the retention of “nonrecord” materials. These documents are broadly defined as drafts, duplicates, convenience copies, publications and other materials that do not document agency activities. These materials can be disposed of when they have served their intended purpose. School districts need to identify the “office of record” when multiple offices possess copies of the same record. The “office of record” is responsible for following the retention period that is specified, duplicates do not need to be retained. A more comprehensive definition of “nonrecords” can be found in the approved schedule (available online at http://www.michigan.gov/documents/hal_mhc_rms_GS1_local_110758_7.pdf).

Record Maintenance

Records can exist in a wide variety of formats, including paper, maps, photographs, microfilm, digital images, e-mail messages, databases, etc. The retention periods listed on this general schedule do not specify the format that the record may exist in, because each government agency that adopts this schedule may choose to retain its records using different recording media. Government agencies are responsible for ensuring that all of their records (regardless of format) are properly retained and remain accessible during this entire retention period. All records need to be stored in a secure and stable environment that will protect them from tampering, damage and degradation. Electronic records are dependent upon specific hardware and software to be accessed and used. It is important to understand that the original technology that is used to create electronic records will eventually become obsolete. As a result, school districts should work with their information technology staff to develop preservation plans for retaining electronic records with long-term (more than 10 years) retention requirements. Various laws (including the Records Reproduction Act, [MCL 24.401-24.406](#)) identify acceptable formats for retaining public records; agencies are responsible for understanding and complying with these laws.

Public Disclosure

Select records series that are listed on this schedule may be exempt from public disclosure, in accordance with the provisions of various state and federal laws. Please consult with your attorney if you need additional information.

Suspending Destruction

School districts must immediately cease the destruction of all relevant records (even if destruction is authorized by an approved Retention and Disposal Schedule) if they receive a FOIA request, if they believe that an investigation or litigation is imminent, or if they are notified that an audit, investigation or litigation has commenced. If relevant records exist in electronic formats (such as e-mail, digital images, word processed documents, databases, backup tapes, etc.), the school district may need to notify its information technology staff. Failure to cease the destruction of relevant records could result in penalties.

Dissolved Districts

If a school district is dissolved and absorbed by another school district(s), the records of the former school district must be transferred to the new district(s) to fulfill the remainder of their retention period. Intermediate School Districts may coordinate the retention of, or retain themselves, the student records of closed public schools and public school academies (if the files are not transferred to another open school) for the remainder of their retention period. The Archives of Michigan may take responsibility for preserving historically significant records (such as board meeting records, annual reports, yearbooks, graduation programs, awards, etc.). School districts in this situation should contact the Archives for assistance at (517) 373-1408 or <http://www.michigan.gov/archivesofmi/>.

Records Management Can Help!

The State of Michigan Records Management Services is available to assist government agencies with their questions about record retention and acceptable recording media. Agencies may contact the Records Management Services at (517) 335-9132. Additional information is also available from the Records Management Services' website <http://www.michigan.gov/recordsmanagement/>, including records management manuals, general schedules, e-mail retention guidelines, microfilming standards and digital imaging standards.

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General Schedule #2 - Public Schools

Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
General Administrative	0100-	Subject Files (supersedes item #K2)	These records are used to support administrative analysis, program and project planning, procedure development, and programmatic activities for a school or school district. <i>Subject files are generally organized alphabetically by topic</i> , such as district administration, student teachers, maintenance, professional development, athletics, clubs, etc. Document types may include periodic activity reports (narrative and statistical), special reports, topical correspondence (including electronic mail), research materials, project planning notes, organizational charts, agency descriptions, etc. Subject files do NOT include files related to individual program activities, human resources files, and accounting records. For topics of continuing interest, files may be segmented into annual files.	RETAIN UNTIL: Topical file is no longer of interest for ongoing administration PLUS: 2 years THEN: Destroy	9/5/2006
General Administrative	0101-	General Correspondence (supersedes item #K1)	General correspondence does not pertain to a specific issue, teacher or student, and it <i>is often organized chronologically or by correspondent's name</i> . General correspondence may include referral correspondence. If the correspondence does pertain to a specific issue, teacher or student, it should be filed with other relevant records. General correspondence may exist in a variety of formats, including memos, letters, notes and electronic mail messages. This series also includes automated or manual tools that index and/or track when correspondence was received, the topic of the correspondence, who is responsible for responding to the correspondence, and when the correspondence is considered closed for further action.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	9/5/2006
General Administrative	0102-	Transitory Correspondence	Transitory correspondence is any form of written communication with a short-term interest that has no documentary value and need not be retained more than 30 days. This type of correspondence has limited administrative and evidential value that is lost soon after the communication is received. Transitory messages do not set policy, establish guidelines or procedures, certify a transaction or become a receipt. Examples of transitory correspondence include letters of transmittal that do not add information to the transmitted materials, routine requests for information that require no administrative action, policy decision, special compilation or research. This type of record also includes invitations to work-related events, notifications of an upcoming meeting, and similar records.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	9/5/2006
General Administrative	0103-	Meeting Records	These records may include meeting minutes, agendas, and distribution materials related to staff meetings, meetings with other school districts, meetings with parents, etc. However, it does not apply to meetings of the school board and its subcommittees (see item #200).	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	9/5/2006
General Administrative	0104-	Planners/Calendars	These may be electronic or manual planners and calendars that are used to track an individual staff member's work-related meetings, assignments, and tasks. Individual employees are responsible for retaining their planners/calendars for the duration of this retention period.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	9/5/2006
General Administrative	0105-	Freedom of Information Act (FOIA) Requests	This file will document any requests for information or public records maintained by the school or school district. They may include requests for information, correspondence, a copy of the information released, and billing information.	RETAIN UNTIL: Date created PLUS: 1 year THEN: Destroy	9/5/2006
General Administrative	0106-	Budget Planning	These records are developed and maintained by each department in the school district to forecast the need for new facilities, equipment, supplies, staff, programs, etc. They may include budget requests, statistics, etc.	RETAIN UNTIL: No longer needed to administer the budget for the current fiscal year, and to prepare future budget requests THEN: Destroy	9/5/2006
General Administrative	0107-	Grants	These files are used to administer grants that are applied for by the school district from state, federal and private agencies. Examples of grants include the Consolidated Application for Federal Funding (Title I, II, III, V), Section 31A grants from the Michigan Department of Education, Safe and Drug Free Schools grants from the ISD, Homeland Security, Michigan School Readiness, and Gates Foundation grants. These files may contain applications, budgets, worksheets, adjustments, plans, rules and regulations, award letters, committee records, staffing sheets with account numbers, grant evaluation/monitoring reports, audits, periodic progress reports, etc.	RETAIN UNTIL: Grant is closed out, plus any additional time that is required by the granting agency for auditing purposes THEN: Destroy NOTE: Final reports and products of the grant may be kept longer for use and reference purposes	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
General Administrative	0108-	Publications	These records may include press releases, brochures, newsletters and other items that are published by the school district to distribute information about upcoming events, accomplishments, services offered, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy NOTE: School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes. <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records.</i>	9/5/2006
General Administrative	0109-	Policies, Procedures, Bylaws and Directives (supersedes item #D4-5)	These records document school district policies, procedures, etc. (including those approved by the school board).	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Superintendent/ Board of Education	0200-	Board of Education Meeting Records--Open Sessions (supersedes item #D1, G3)	These records document the proceedings of the school district's Board of Education and any subcommittees or advisory committees to the board. They may include the approved minutes and agenda packets containing any materials that are distributed to board members for review (such as budgets, district calendars, policies, contracts, election resolutions, etc). This series does not include meeting notices (see item #202), bulletins, or documentation of meeting related expenditures. Audio and/or video recordings of the meetings can be destroyed once the minutes are approved. These records are preserved permanently to document the institutional memory of the school district.	Permanent. <i>Schools are encouraged to contact the Archives of Michigan for assistance if they cannot retain these records permanently.</i>	9/5/2006
Superintendent/ Board of Education	0201-	Board of Education Meeting Records--Closed Session	These records may consist of minutes taken during a closed session of the board, including any audio or visual recordings.	RETAIN UNTIL: Approval of the minutes of the regular meeting at which the closed session was held PLUS: 1 year, and 1 day THEN: Destroy	12/7/2010
Superintendent/ Board of Education	0202-	Notices of a Public Meeting	The Open Meetings Act requires public bodies to publish a notice to the public prior to holding a meeting or a hearing.	RETAIN UNTIL: Date created PLUS: 1 year THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0203-	Board Member Files	These files contain information about people who served on the district's Board of Education. They may contain petitions, conference/training requests, correspondence, etc.	RETAIN UNTIL: Individual is no longer serving as a member of the board THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0204-	Board Candidates	These files contain information about people who ran for vacant school board seats. They may include the affidavit of identity, petition sheets, correspondence, election certificate, receipts for the nominating petition, etc. These records shall be retained by the school district only if the school district is responsible for administering the election.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0205-	Millage Files	These files document millage proposals. They may include the presentations, research, budgetary documents, ballot language, attorney opinions, and board resolutions. These files will include election materials if the school district is responsible for administering the election. <i>Note: Please see General Schedule #23 "Elections Records" for additional information about the retention of item #205 - 209.</i>	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0206-	Election Results (see also GS 23.213)	These records document the final vote count for each school election and include the Board of Canvassers certification. These records shall be retained by the school district only if the school district is responsible for administering the election. <i>Note: Please see General Schedule #23 "Elections Records" for additional information about the retention of item #205 - 209.</i>	Permanent	12/7/2010
Superintendent/ Board of Education	0207-	Election Returns (see also GS 23.223, 23.233, 23.234)	These records may include poll lists, statements, tally sheets, absent voters' applications, absent voters' return envelopes, absent voters' records, other returns made by inspectors of the precincts, etc. (MCL 168.811). These records shall be retained by the school district only if the school district is responsible for administering the election. <i>Note: Please see General Schedule #23 "Elections Records" for additional information about the retention of item #205 - 209.</i>	RETAIN UNTIL: Canvass of the election is completed PLUS: 2 years THEN: Destroy	12/7/2010

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Superintendent/ Board of Education	0208-	Election Ballots (see also GS 23.205)	These records may include ballots, seals, ballot tags, ballot labels from voting machines and ballot pages from punch card devices, etc. <i>Note: Please see General Schedule #23 "Elections Records" for additional information about the retention of item #205 - 209.</i>	RETAIN UNTIL: 30 days after the canvass of the election is completed, until a recount is completed, until a court order or a Secretary of State order to suspend destruction is lifted, or until an investigation into defective ballots or voting equipment is completed. THEN: Destroy	12/7/2010
Superintendent/ Board of Education	0209-	Election Notices (see also GS 23.218)	These records may include the notice of the last day of registration, the notice of election, etc. These records shall be retained by the school district only if the school district is responsible for administering the election. <i>Note: Please see General Schedule #23 "Elections Records" for additional information about the retention of item #205 - 209.</i>	RETAIN UNTIL: Canvass of the election is completed PLUS: 2 years THEN: Destroy	12/7/2010
Superintendent/ Board of Education	0210-	Property Transfers (supersedes item #15)	These files are maintained by ISDs to document when land is added and removed from a school district's boundaries. They may include boundary change forms, correspondence, decisions, appeals, hearing schedules, legal descriptions of the property, maps, etc. A copy of these documents is also maintained by the Michigan Department of Education, the county equalization office, and the county clerk.	RETAIN UNTIL: Date created PLUS: 50 years THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0211-	Maps	These maps identify school district and ISD boundaries and plats. They are used to identify boundary corrections. Revisions are sent to the county equalization office, the Michigan Department of Education and local clerks.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0212-	Reorganization, Consolidation or Annexation (supersedes item #D3)	These records document the reorganization, consolidation or annexation of a school district. They may include copies of board resolutions, election results, maps, correspondence, supporting documentation, etc.	RETAIN UNTIL: Date created PLUS: 50 years THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0213-	Annual Reports	Annual Education Improvement Plans and Progress Reports are published by each school district in accordance with the provisions of Public Act 25 of 1990, federal No Child Left Behind legislation, and MCL 388.1619. One copy permanently shall be retained in the school library or administration offices for historical purposes.	Permanent. <i>Schools are encouraged to contact the Archives of Michigan for assistance if they cannot retain these records permanently.</i>	9/5/2006
Superintendent/ Board of Education	0214-	Security Access Forms	These forms identify school district personnel who are authorized to access the Michigan Education Information System (MEIS) and other computer systems operated by the State of Michigan to submit and access information about the school district.	RETAIN UNTIL: Authorization is revoked THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0215-	Speeches	These files document official presentations conducted by the Superintendent. They may contain electronic presentations, speaker notes, formal papers, etc.	RETAIN UNTIL: No longer of use for preparing future presentations, or for documenting significant events THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0216-	Superintendent's Building Reference Files	These reference files contain information about issues, activities and events taking place at each building in the school district. They may include staff information, project records, etc.	RETAIN UNTIL: No longer of use for reference to the Superintendent THEN: Destroy	9/5/2006
Superintendent/ Board of Education	0217-	Graphic Design	These records document the production of publications and may log each project that is worked on.	RETAIN UNTIL: No longer needed to produce current and future publications THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Superintendent/ Board of Education	0218-	Memorabilia	This series includes photographs, news clippings, certificates, awards, etc. that document events and activities of the school district.	RETAIN UNTIL: No longer of use for reference THEN: Destroy NOTE: School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes. <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records.</i>	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Business Office	0300-	Insurance Policies (supersedes item #D6, 8)	These files include insurance policies that provide coverage for property and casualty, workers compensation, errors and omission, fleet, general liability, umbrella, etc.	RETAIN UNTIL: Expiration date PLUS: 30 years THEN: Destroy	9/5/2006
Business Office	0301-	Insurance Claims	These files are used to document claims that are submitted to an insurance provider. They may contain claim forms, correspondence and supporting documents for each claim that is submitted.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0302A-	Accident Reports/Claims--Adults (supersedes item #H2e-f)	Accident reports for personal injuries, property damage claims, and other incidents provide details about any unexpected incidents on school premises/property. The reports may list the location of the accident, description of the accident, first aid administration, witnesses, person injured, type of injury or property damage, actions taken, recommendations to prevent reoccurrence, etc. The reports may be reviewed and signed by relevant administrators. These files may include related information, such as witness statements, medical information, legal counsel, subsequent claims, etc.	RETAIN UNTIL: Date created PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0302B-	Accident Reports/Claims--Minors	Accident reports for personal injuries, property damage claims, and other incidents provide details about any unexpected incidents on school premises/property. The reports may list the location of the accident, description of the accident, first aid administration, witnesses, person injured, type of injury or property damage, actions taken, recommendations to prevent reoccurrence, etc. The reports may be reviewed and signed by relevant administrators. These files may include related information, such as witness statements, medical information, legal counsel, subsequent claims, etc.	RETAIN UNTIL: Minor turns 18 years old PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0303-	Bids and Quotes (supersedes item #D7, 11-12)	Bids are received from vendors for services and contracts that the school district needs for construction, furnishings, grounds maintenance, trash and snow removal, cleaning services, food, transportation, etc. These files may include the Invitation to Bid, the bid documents that are submitted, the reviewer documentation, etc.	RETAIN UNTIL: Bid is awarded PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0304-	Contracts (supersedes item #D9)	These contracts may cover a variety of services including construction, custodial work, copiers, facility rental, Internet providers, maintenance, wiring, telephone services, employment, land, etc. These files may include contracts, correspondence with the vendor, warranties, copies of purchase orders, etc.	RETAIN UNTIL: Expiration date PLUS: 6 years THEN: Destroy	9/5/2006
Business Office	0305-	Litigation	These files document any litigation to which the school district is a party. The district's legal/general counsel will maintain the official and complete set of these documents. If the legal counsel is contracted by the school district, the district may agree to be the official record keeper. These files may include depositions, transcripts, decisions, correspondence, data, exhibits, research materials, reports, press releases, media clippings, etc.	RETAIN UNTIL: Case is closed PLUS: 5 years THEN: Destroy	9/5/2006
Business Office	0306-	Tax Levy Certification and Reconciliation (supersedes item #A6a-j, I3-4)	These records are used to calculate the amount of taxes that will be collected, based upon the millage rate and the taxable value. The files include the L-4029 Tax Levy Certification form and other supporting documents.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0307-	Real Property Records (supersedes item #D2a-b)	These files are maintained on all buildings and property owned by the school district. They may include deeds, easements, surveys, abstracts, appraisals, scope documents projecting work to be done, construction plans (these plans become obsolete and may be destroyed if the work is not conducted within 10 years), etc.	RETAIN UNTIL: Property is no longer owned by the district THEN: Destroy	9/5/2006
Business Office	0308-	Budget (supersedes item #G1-4)	These records document the adopted amount of money along with any amendments that is appropriated for each account/line item for the current and previous school years. A copy of all approved budgets will be retained permanently in the school board meeting records.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Business Office	0309-	Accounting Transaction Detail (supersedes item #A2a, H1a)	This information details all revenue, expenditures and balance sheets that are recorded in various accounts maintained by the school district. It may be retained as paper, electronic data, computer output microfiche, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0310-	Chart of Accounts (supersedes item #A2b)	This chart defines the accounting codes that are used in the accounting transaction detail (see item #309).	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0311-	Receivables	These records contain invoices that are sent to departments or groups that are billed for services, such as facility use, printing, recreation activities, before and after school programs, transportation, etc. They may include support documents, agreements, and ledgers.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0312-	Receipts (supersedes item #A2c, A3)	These records document deposits into various accounts. They may include a cash receipt list, receipt register, etc. Information in these records may include the check number, date, receipt number, description, amount deposited, batch number, account number, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0313-	Gate Receipts (supersedes item #H1b)	These records identify the amount of money that is collected at each athletic event for admission. They may identify the date, time, event, competition level, number of adult tickets sold, number of child tickets sold, event expenses (ticket takers, clock operators, etc.), etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0314-	Journal Entries (supersedes item #A2f)	These records document transfers between accounts, they record expenses not included in accounts payable, and revenues not in cash receipts. The transaction balance report may identify the account number, account description, transaction amount, date, journal entry number, transaction description, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0315-	Budget Summaries and Balance Sheets (supersedes item #A2d)	These records document the status of budgetary activity on each account. They may identify the account balances per month and year to date, activity within the month on each account, etc.	RETAIN UNTIL: No longer needed to verify the status of financial accounts THEN: Destroy	9/5/2006
Business Office	0316-	Payment Records (supersedes item #A1a, A3, H3)	These files document the payment for goods and services. They may include purchase orders, packing slips, requisitions, invoices, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0317-	Telephone/Communications Bills	These bills are received from the telephone service provider and may be used to generate bills that are distributed to each department in the school district. These bills may cover services for telephones, cellular phones, pagers, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0318-	Bank Activity (supersedes item #A1b, c, A3, H1d)	These records document activity on the school district's bank account. They may include deposit slips, reconciliations, cancelled checks, bank statements, electronic funds transfer transactions, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0319-	State Cost/Expenditure Reports (supersedes item # 11, J1a, c, J4a-d)	The State of Michigan requires school districts to submit a wide variety of reports to the Department of Education, the Center for Educational Performance and Information (CEPI), the Department of Licensing and Regulatory Affairs (LARA), etc. These reports may document school finances, special education, grant expenditures, career and technical education, personnel, buildings, transportation, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0320A-	Act 18 Funds--Estimates	These ISD records are used to develop estimates for the distribution of Act 18 special education funds.	RETAIN UNTIL: Final report is approved THEN: Destroy	9/5/2006
Business Office	0320B-	Act 18 Funds--Final Report	These ISD records document the final amount of money that is distributed each year for Act 18 special education funds. These documents may also be found in the school board's meeting records.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006

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Business Office	0321-	Medicaid (supersedes item #J3)	Districts are reimbursed by Medicaid for providing eligible services to special education and other students. The Medicaid program has established documentation requirements when reimbursement is requested by any provider, including school districts. Medicaid may conduct audits of the school records to verify that payments made were appropriate. Most districts contract with a vendor to do their Medicaid billing, but some districts manage all the steps themselves to do their own billing. Nurses, teachers and therapists document the services they provide using electronic or paper records. Districts submit their claims online to the Medicaid program for certain covered services after verifying which of their students are eligible for Medicaid. These records may include doctors prescriptions/referrals, provider reports, outreach and referral service reports, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0322-	Investments (supersedes item #A4a-b)	These files include statements from investment accounts that identify the date and amount of each transaction, the maturity and balance of the account. They may include cash flow and reconcile statements that summarize the beginning and ending balance of the account and all transactions dates and amounts.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Business Office	0323-	Municipal Finance and Borrowings (supersedes item #F1-5)	These files document bonds for capital and construction projects, including school aid notes, School Bond Loan Fund, etc. They may include transcripts of bond proceedings and other supporting documentation.	RETAIN UNTIL: Expiration of the bond/note PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0324-	Final Affidavit of Payment (supersedes item #F3-5)	The final affidavit of payment is evidence that all funds that were borrowed by the school district were paid back in full.	Permanent	9/5/2006
Business Office	0325-	Bond Cremation Certificates (supersedes item #F6)	The Bond Cremation Act (PA 56 of 1962) requires public corporations to cremate or disintegrate obligations or interest coupons upon maturity, and to receive a certificate documenting the destruction of the records.	Permanent	9/5/2006
Business Office	0326-	Supply Inventories (supersedes item #A2e)	These records document the volume of supplies (office, school, maintenance, etc.) that are purchased and used.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Business Office	0327-	Fixed Asset Inventory Data (supersedes item #A5a-b)	This record is a list of all major property and its book value. School district policy determines the value at which property must be included on an inventory. The value of these items is then distributed across the useful life of the property. Information on the inventory may include a description of the item, value, date purchased, depreciation amount, insurable value, building location, etc.	RETAIN UNTIL: Annual report for the fiscal year in which the item was disposed is audited THEN: Destroy	9/5/2006
Business Office	0328-	Fixed Asset Annual Report (supersedes item #A5a-b)	The Government Accounting Standards Board (GASB) Statement 34 establishes the annual reporting requirements for financial statements prepared by state and local governments. This annual report is produced from the fixed asset inventory.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Business Office	0329-	Audits--Support Documents (supersedes item #J2)	Audits of school finances are conducted annually by an independent certified public accounting firm. These files may include work papers, schedules, reconciliations, etc.	RETAIN UNTIL: Final report is issued [see OMB Circular A-133.320 (g)] PLUS: 3 years THEN: Destroy	9/5/2006
Business Office	0330-	Audits--Final Report (supersedes item #A2g, I2)	This final report is submitted by the auditors.	Permanent	9/5/2006
Business Office	0331-	Indirect Costs (supersedes item #J1b)	These records are created annually to determine the allowable indirect cost rate that the district may charge to various state and federal grants. The actual indirect cost rates are determined/approved by the Michigan Department of Education.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006

School districts need to identify the "office of record," duplicates are "nonrecords" that do not need to be retained.

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Personnel	0400A-	Personnel Files (supersedes item #C1a, H4b-d, J4g-h)	These files are maintained on each employee of the school district. They may include the Michigan New Hire form, resume, teaching certificate, assignment letters, continuing education, clippings, correspondence, service record change forms, attendance, evaluations, applications, tenure evaluations, investigations, testing, training, blood borne pathogen training, transcripts, contracts, disciplinary records, layoff notices, recall notices, certifications for CPR and first aid, bus driver certifications, current driver's licenses, driving records, police accident reports, etc.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 6 years THEN: Destroy	12/7/2010
Personnel	0400B-	Personnel Files--Employees Cited for Unprofessional Conduct	These files are maintained on employees of the school district who were cited for unprofessional conduct (MCL 380.1230b). They may include the Michigan New Hire form, resume, teaching certificate, assignment letters, continuing education, clippings, correspondence, service record change forms, attendance, evaluations, applications, tenure evaluations, investigations, testing, training, blood borne pathogen training, transcripts, contracts, disciplinary records, layoff notices, recall notices, certifications for CPR and first aid, bus driver certifications, current driver's licenses, driving records, police accident reports, etc.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 50 years THEN: Destroy	9/5/2006
Personnel	0401-	Employee Database (supersedes item #C1a)	School districts may maintain electronic data to administer personnel and payroll functions including timekeeping, tenure, payroll, retirement, etc.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 6 years THEN: Destroy	12/7/2010
Personnel	0402-	Employment Verification Forms	These forms are received from mortgage or credit companies that want to verify the employment status of an employee.	RETAIN UNTIL: Date created PLUS: 30 days THEN: Destroy	9/5/2006
Personnel	0403-	Background Files	These files document that school districts complied with the requirement to conduct background checks on all employees. These files may contain release forms to conduct criminal history checks, fingerprint checks and professional conduct checks, and the results of those checks.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 6 years THEN: Destroy	12/7/2010
Personnel	0404A-	Medical Files (Non-exposure)	These files contain employee medical information pertinent to employment. They are maintained separately from the employee personnel file (see item #400). They may contain medical leave applications, insurance forms (including disability forms), leave extension requests, medical certifications by physician, applications for continuation of insurances, doctor's releases, supporting medical documentation, accommodations, blood tests, vision and hearing tests, tuberculosis tests, off-work notices, family medical leave act, drug and alcohol tests, current physical exams, etc.	RETAIN UNTIL: Individual is employed by the school district or receiving benefits, whichever is longer PLUS: 7 years THEN: Destroy	12/7/2010
Personnel	0404B-	Medical Files (Exposure)	These files contain employee medical information pertinent to employment that document employee exposure to toxic substances or blood-borne pathogens. They are maintained separately from the employee personnel file (see item #400). They may contain medical leave applications, insurance forms (including disability forms), leave extension requests, medical certifications by physician, doctor's releases, supporting medical documentation, exposure documentation, etc. Retention of these files is governed by OSHA 29 CFR 325.3457.	RETAIN UNTIL: Date created PLUS: 30 years THEN: Destroy	12/7/2010

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Personnel	0405-	COBRA Plans	Congress passed the Consolidated Omnibus Budget Reconciliation Act (COBRA) health benefit provisions in 1986. The law amends the Employee Retirement Income Security Act, the Internal Revenue Code and the Public Health Service Act to provide continuation of group health coverage that otherwise might be terminated. COBRA provides certain former employees, retirees, spouses, former spouses, and dependent children the right to temporary continuation of health coverage at group rates. This record will include copies of all COBRA required notices, any valid documentation or signed acknowledgements that the notices were received by the employee/qualified beneficiary; detailed documentation related to any instance in which COBRA continuation is not offered, enrollment forms, correspondence, monthly statements, status reports, etc.	RETAIN UNTIL: Qualifying event takes place PLUS: 6 years THEN: Destroy	9/5/2006
Personnel	0406-	Substitute Teachers	These records are used to contact substitute teachers for assignments.	RETAIN UNTIL: Notification that the teacher has received full time employment, has moved, does not respond to calls, or fails to renew with the district THEN: Destroy	9/5/2006
Personnel	0407-	Teacher Professional Development	Teachers are required to take 30 hours of professional development classes each year. These records are used to keep track of the courses taken by each teacher. They may contain the teacher's name, the category of class, the number of hours that the class is worth, etc.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 3 years THEN: Destroy	9/5/2006
Personnel	0408-	Employee Training	These files document attendance at mandatory training. They may include class lists. Additional documents will be retained in the personnel file.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	9/5/2006
Personnel	0409 -	I-9 File	Federal Form I-9 includes verification by employers of identity and immigration status of all new employees. <i>(See 8 CFR 274 a.2 - 1998)</i>	RETAIN UNTIL: Date of hire PLUS: 3 years OR RETAIN UNTIL: Termination date PLUS: 1 year <i>WHICHEVER IS LATER</i> THEN: Destroy	9/5/2006
Personnel	0410-	Grievances	These files document employee grievances against the school district and the resolution of the grievance. They may include written grievances, correspondence, summary sheets, legal documents, employee history information, etc.	RETAIN UNTIL: Grievance is resolved PLUS: 1 year THEN: Destroy	9/5/2006
Personnel	0411-	Employee Injury Records—Exposure	These files include any reports of accidents or injuries involving exposure to toxic substances or blood-borne pathogens. These files are maintained separately from the personnel file. These files may include incident reports, medical reports, responses by supervisors and management, requests for medical leave, insurance forms, applications for continuation of insurance, supporting medical documentation, etc. Access to these files is governed by OSHA 29 CFR 1910.1020(d)(1)(i).	RETAIN UNTIL: Date created PLUS: 30 years THEN: Destroy	12/7/2010
Personnel	0412-	Employee Injury Records—Non-exposure	These files include any reports of accidents or injuries involving an employee. Schools are not required to make annual reports to OSHA, but must report any incident in which more than three employees are injured (29 CFR 1904.2). Records of injuries are kept separate from the personnel file. These files may include incident reports, medical reports, responses by supervisors and management, requests for medical leave, insurance forms, application for continuation of insurance, supporting medical documentation, etc. OSHA requires that any information pertaining to a job-related illness and injury be kept on file for five years after the end of the fiscal year in which the event occurred.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	9/5/2006

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Personnel	0413-	Employee Injury Records-- OSHA 300 Log	This log identifies all employee injuries within a calendar year. In accordance with 9 CFR 1904.33, this log and other supplementary records shall be retained for 5 years following the calendar year that the records cover.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	9/5/2006
Personnel	0414-	Job Descriptions	These records document job classification systems and positions. Job descriptions may include a summary of responsibilities, functions, applicant requirements, salary and benefit classifications, etc.	RETAIN UNTIL: Replaced by a new version PLUS: 6 years THEN: Destroy	12/7/2010
Personnel	0415-	Position Re-classifications	These files contain requests from an employee to have a position re-classified, copies of existing and proposed job descriptions, decisions affecting the request and other related documents.	RETAIN UNTIL: Date created PLUS: 6 years THEN: Destroy	12/7/2010
Personnel	0416A-	Job Applications - Unsolicited/Ineligible	These files document applicants for positions who were not hired. This includes unsolicited applications, unless the local government has a written policy prohibiting the acceptance of unsolicited applications, or if the person is determined to be ineligible for the position to which they applied. They may include resumes, letters of interest, applications, regret letters, qualification exam scores, and supporting documents.	RETAIN UNTIL: Decision is made to not hire the individual PLUS: 1 year THEN: Destroy	
Personnel	0416B-	Job Applications - Considered, Not Hired	These files document applicants for positions who were considered, but not hired, regardless of whether they were interviewed. They may include resumes, letters of interest, applications, regret letters, qualification exam scores, and supporting documents.	RETAIN UNTIL: Position is filled PLUS: 2 years THEN: Destroy	
Personnel	0417-	Emergency Contacts	These records identify the people that the employee wants to be contacted if they are involved in an emergency situation.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006
Personnel	0418-	Workers Disability Compensation Files (supersedes item #C2a-b)	These files document any claims made for workers disability compensation benefits. They may consist of a copy of the report of the incident/injury made by the employee (original is sent to the insurer), a copy of all reports from the occupational health center, etc. Any litigation is kept in a separate file.	RETAIN UNTIL: Claim is settled PLUS: 7 years THEN: Destroy	9/5/2006
Personnel	0419-	Worker Disability Compensation Reports (supersedes item #C2a)	These reports are received from disability insurance providers. They identify the amount of benefits that were paid from the policy.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Personnel	0420-	Labor Agreements and Negotiations	These files document labor negotiations and resulting contracts with individual employees and employee groups. It may include salary and benefit schedules, ground rules proposals and counter proposals, secondary negotiations, meeting minutes, any agreements, final contracts, etc. Teachers may have individual contracts that are maintained in their personnel file (see item #400). Separate files are maintained for each employee negotiating groups.	RETAIN UNTIL: Expiration date PLUS: 10 years THEN: Destroy	9/5/2006
Personnel	0421-	Seniority Lists	These documents are sent to union presidents for notification of seniority status.	RETAIN UNTIL: Replaced by a new version PLUS: 1 year THEN: Destroy	12/7/2010
Personnel	0422-	Letters of Assurance	These notices are distributed to notify all staff who work less than a full year that they will be provided with reasonable assurance of employment with the district for a specified period of time.	RETAIN UNTIL: Specified period of time ends THEN: Destroy	12/7/2010
Personnel	0423-	Intent to Return	This document is distributed to support staff (teacher assistants, paraprofessionals, etc.), per contractual requirements. It is used to identify whether the employee intends to return to their position for the following school year.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	12/7/2010

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Payroll	0500A-	Employee Files—Employees Enrolled in a Pension Plan (supersedes item #B1)	These files are maintained on each employee who is enrolled in a pension plan (such as the MPERS or a locally operated plan). <i>They document activities that affect payroll.</i> They may include W-4, hiring authorization, requisitions, pay increase/change of status notices, contract calculations, long-term disability, retirement purchases, current enrollment for benefits (including health, life, disability, dental, vision and supplemental insurance), credit union deposits, flexible spending accounts, investments in tax deferred accounts (such as 403B, 401K, 457, etc.), employee/employer deferral elections, employee/employer loan agreements, contribution limit testing, supporting documentation for garnishments, levies and deductions, tax deferred payment agreements, retirement beneficiary forms, final salary affidavit, electronic funds transfer applications, etc.	RETAIN UNTIL: Individual is employed by the school district PLUS: 50 years OR RETAIN UNTIL: MPERS retirement PLUS: 6 years <i>WHICHEVER IS SOONER</i> THEN: Destroy	12/7/2010
Payroll	0500B-	Employee Files—Employees Enrolled in Defined Contribution Plans Only	These files are maintained on each employee who is enrolled in a defined contribution plan only and does not receive a pension. <i>They document activities that affect payroll.</i> They may include W-4, hiring authorization, requisitions, pay increase/change of status notices, contract calculations, long-term disability, current enrollment for health benefits, credit union deposits, flexible spending accounts, investments in tax deferred accounts (such as 403B, 401K, 457, etc.), employee/employer deferral elections, employee/employer loan agreements, contribution limit testing, supporting documentation for garnishments, levies and deductions, tax deferred payment agreements, beneficiary forms, final salary affidavit, electronic funds transfer applications, etc.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 6 years THEN: Destroy NOTE: If an employee's abandoned wages are reported and remitted to the Michigan Department of Treasury, the employee's name and last known address need to be retained by the employer for 10 years.	12/7/2010
Payroll	0501-	Salary and Benefit Schedules	These records document the rate of pay for employees and define the benefits that are offered.	RETAIN UNTIL: Date created PLUS: 6 years THEN: Destroy	9/5/2006
Payroll	0502-	Payroll Registers (supersedes item #B4b)	These reports are produced to document payroll activities. Information in the report may include the employee name, social security number, employee identification number, gross wages, deductions, net pay, current pay period, year to date earnings, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 50 years THEN: Destroy NOTE: <i>if none of the school district's employees that are listed on the register are enrolled in a pension plan, these records can be retained for FY+7, in accordance with item #503.</i>	9/5/2006
Payroll	0503-	Payroll Reports (supersedes item #B4a)	Various reports are generated after paychecks are issued to verify the accuracy of the payroll, including payroll summaries, pay journals, check registers, account distributions, payroll liabilities, payroll transactions, payroll account creation reports, gross pay balance, deduction registers, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Payroll	0504-	Retirement Reports (supersedes item #B2c)	These reports are prepared per pay period (previously they were prepared quarterly) to track employee and school district contributions into retirement plans. Information in the report includes the payroll date, employee name, social security number, employee identification number, retirement hours, wage code, classification, retirement wages, withholding for the member investment plan, district contribution, rate of pay, contract dates, number of payments per year, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Payroll	0505-	Time and Attendance	These records are submitted by employees for each pay period to document hours worked and leave time used.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy <i>NOTE: if the school district's final average compensation calculation is longer than 3 years, it will need to retain these records for at least that calculation timeframe.</i>	9/5/2006
Payroll	0506-	Federal/State Tax Deductions (supersedes item #B3)	These records document payment of financial liabilities for monies withheld from employee wages. The records may include the quarterly form 941 to pay reporting to the Internal Revenue Service for taxes withheld, quarterly transfer of state withholding and sales taxes, Medicaid wage detail, quarterly reports, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Payroll	0507-	W-2 and W-3 Forms (supersedes item #B1)	This form documents the annual gross wages, federal, state, Medicare, and local taxes withheld for the purpose of reporting income taxes.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	12/7/2010
Payroll	0508-	Michigan Employment Security Commission (MESC) Reports	These reports are generated for both contributing and reimbursing employers, generally on a quarterly basis, to identify employees, their wages, social security numbers, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Payroll	0509-	Unemployment Claims (supersedes item #C5)	These records are received from the Unemployment Agency. They identify people who are claiming unemployment benefits from the school district. They are used to verify that the people are entitled to these benefits, and to resolve discrepancies.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Payroll	0510-	Wage Differential Reports	These records explain any wage differential between sexes and substantiating documents.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	12/7/2010

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Pupil Accounting	0600-	Membership Reports (supersedes item #IIIA)	Students are counted two times each year. Data related to attendance is currently submitted to the Center for Education and Performance and Information (CEPI) using the Single Record Student Database (SRSD). Districts currently produce a Local District Summary Report (DS-4061) each time they submit data to the SRSD. ISDs produce an Audited Pupil FTE Count (DS-4120) each time they submit data to the SRSD.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	9/5/2006
Pupil Accounting	0601-	Planned and Actual Days and Clock Hours Reports (supersedes item #IIIA4)	These records consist of two annual reports submitted to the Michigan Department of Education to monitor compliance with MCL 388.1701, dealing with the required number of days and clock hours of instruction. The Planned Days and Clock Hours Report (DS-4168B) is submitted in the spring of the school year. This report documents the district's planned schedule of instructional hours. The Actual Days and Clock Hours Report (DS-4168) is submitted at the completion of the school year. This report documents the actual days and hours of instruction the school district provided.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	9/5/2006
Pupil Accounting	0602-	Student Count Support Documents (supersedes item #IIIB)	These records are used to prepare and document the pupil counts that are submitted to the Michigan Department of Education. This includes all of the records that are required by the Pupil Accounting Manual (see section 1—Required Documents).	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	9/5/2006
Pupil Accounting	0603-	Internal Audits	School districts may audit their school buildings periodically to confirm that documentation for FTE and non-traditional students is accurate. Files may include checklists of paperwork and counts, alphabetical membership lists of students, etc.	RETAIN UNTIL: ISD desk audit and field audit (if scheduled) are completed PLUS: 3 years THEN: Destroy	9/5/2006
Pupil Accounting	0604-	External Audits--Local School District Copy	These audits are conducted randomly by the ISD to verify student counts (FTE) and that procedures are in place and followed. Files may include worksheets, checklists of errors and problems, etc.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	9/5/2006
Pupil Accounting	0605-	Pupil Audits--ISD Copy (supersedes item #IIIC)	Local school districts submit their pupil accounting data to the ISD, and the ISD conducts desk audits of the paperwork to verify its accuracy. In addition, ISDs conduct random field audits at local school districts, and they audit pupil exit statuses and other pupil data used in calculating annual graduation and pupil dropout rates. Files may include worksheets, notes and checklists of errors and problems, and narrative reports that summarize audit findings for each school district and each count that is conducted.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Pupil Accounting	0606-	Unique Identification Codes (UIC)	These codes are assigned by the Center for Educational Performance and Information (CEPI) to each student in the State of Michigan. The records contain the code number, student name, birth date, gender, general education FTE, special education FTE, alternative education FTE, date enrolled, school identification number, etc. Once the UIC is assigned, it is used for multiple purposes/records for tracking.	RETAIN UNTIL: Student reaches the age of 26 THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Instruction	0700-	Standardized Testing Data	These records may contain summary scores for statewide and locally administered standardized tests including MEAP, California Test of Basic Skills (CTBS), TerraNova, Gates McGinity, Iowa, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 5 years THEN: Destroy	9/5/2006
Instruction	0701-	District Assessments	These files document the scores of each student in the district on year-end math tests, language arts tests, writing tests, diagnostic reading tests, etc. They may contain the student's name, teacher, grade, school, score, etc.	RETAIN UNTIL: Graduation, transfer or expected graduation date THEN: Destroy	9/5/2006
Instruction	0702-	Curriculum Development	These files contain annual plans that map out curriculum goals, subject area benchmarks, grade level goals, grade level content expectations (GLCE), etc. They may include council notes, parent guides, report card templates, annual reports, sexual education advisory committee records, etc.	RETAIN UNTIL: No longer of use for reference when updating the curriculum THEN: Destroy	9/5/2006
Instruction	0703-	School Improvement Plan	These plans are submitted to the Michigan Department of Education through the consolidated application. They cover a 3-5 year range of testing goals, strategies to improve student performance, professional development, etc. The files include meeting notes, reference data, test scores, surveys, etc. These records are kept until the plan is superseded.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Information Technology	0800-	Technology Inventory	This record may be used to inventory equipment, software, telephones, etc. It may contain the tag number, location, serial number, price, account source, etc.	RETAIN UNTIL: Annual report for the fiscal year in which the item was disposed is audited THEN: Destroy	9/5/2006
Information Technology	0801-	Software License Agreements	These agreements define how many users are licensed to access each software application.	RETAIN UNTIL: Expiration date THEN: Destroy	9/5/2006
Information Technology	0802-	Internet Access Policies/Agreement	These documents define the terms of use and access of the Internet, information technology resources, dial-up access to the network, etc. The documents are used to generate user accounts for staff, teachers and students. They are signed by the user and a parent, if the user is under the age of 18.	RETAIN UNTIL: Replaced by a new version, or the person is no longer a user THEN: Destroy	9/5/2006
Information Technology	0803-	Technology Service Requests	This record is used to document problems with equipment and to generate repair tickets. It may contain the user name, a description of the problem, the location of the equipment, the date/time the request was received and resolved, etc.	RETAIN UNTIL: Fiscal year ends THEN: Destroy	9/5/2006
Information Technology	0804-	Technology Network Maps/Documents	These records are used to map and define the technology infrastructure and the wiring of phone lines. They may include security information, identification numbers, passwords, etc.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006
Information Technology	0805-	Internet Site Content	The school district's website is an interface to presenting information to the public about programs, events and activities. This record includes the content and layout of the website. Internet technology is not designed to support the preservation of information. Information that is posted on the website that should be preserved for permanently, should be retained in paper form, when possible.	RETAIN UNTIL: No longer online THEN: Destroy	9/5/2006
Information Technology	0806-	Communications	Some staff are issued 2-way radios, cell phones, pagers, etc. to facilitate communication. These files contain service contracts, employee contracts, FCC licenses, distribution lists, etc.	RETAIN UNTIL: Equipment is returned by the staff or destroyed THEN: Destroy	9/5/2006
Information Technology	0807-	Technology Training	The information technology staff may conduct training about the use of computer software or equipment for school district employees. These files contain the curricula materials.	RETAIN UNTIL: Course materials are replaced by a new version, or until the course is dropped entirely from the training curriculum THEN: Destroy	9/5/2006
Information Technology	0808-	Universal Service Fund (USF)	The USF, also known as "e-rate," is a federal program that provides discounts on telecommunications and internet access to public libraries and school districts. These files document the amount of the discount that is awarded to the school district and how the allocation was computed. All applicants and service providers are required to retain receipt and delivery records relating to the technology plans, pre-bidding, bidding, contracts, application process, invoices, provision of services, and other matters relating to the administration of the Universal Service Fund. The suggested list of documents to be retained can be found in Paragraphs 45-50 in the FCC's 5th Report and Order (FCC 04-190).	RETAIN UNTIL: Last service date PLUS: 5 years THEN: Destroy	12/7/2010

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Security/Public Safety	0900-	Incident Files	These reports document criminal and non-criminal incidents taking place on school property and at school events, including theft and vandalism. These records may include police reports, petitions, warrants, witness lists, evidence envelopes (these are generally given to the police department), statements, photos, negatives, etc. Criminal cases are handled by the local police department, and other incidents may be handled by the school district for disciplinary purposes. These records may also be used to support insurance claims.	RETAIN UNTIL: Date created PLUS: 7 years THEN: Destroy	9/5/2006
Security/Public Safety	0901-	Complaint Number Log	This log is used to reference the incident files. It may identify the incident number, date, time, building, location, offense type, victim, accused, comments, etc.	RETAIN UNTIL: Date created PLUS: 7 years THEN: Destroy	9/5/2006
Security/Public Safety	0902-	Daily Activity Log	This log is generated daily to identify the activities of public safety officers, including contact with students and incidents.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	9/5/2006
Security/Public Safety	0903-	Security Videos	Security systems record activity that takes place in select locations. The systems may be motion activated. Videotapes are often re-used in accordance with a regular rotation cycle, unless they are needed as evidence for an incident. This series applies to both analog and digital video recordings.	RETAIN UNTIL: Date created PLUS: 30 days THEN: Destroy	9/5/2006
Security/Public Safety	0904-	Visitor Logs	These logs may be maintained at school and administration buildings to identify people who have visited the building, such as tutors, parents, presenters, etc. They may also be used to log students in and out of the building if they are arriving/leaving at unscheduled times.	RETAIN UNTIL: Fiscal year ends THEN: Destroy	9/5/2006
Security/Public Safety	0905-	Emergency Plan	These plans define potential emergencies, and how the staff should respond to each type of incident. They are reviewed and updated annually.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006
Security/Public Safety	0906-	Emergency Drills	In accordance with MCL 29.19, schools are required to conduct 8 fire drills and 2 tornado drills each year. These records may identify the date and time of the drill, evacuation information, areas in need of improvement, etc. The drill report form is signed by the principal, and a copy is sent to the local fire department.	RETAIN UNTIL: Fiscal year ends THEN: Destroy	9/5/2006
Security/Public Safety	0907-	Homeland Security Plans	These plans may include surveys of buildings, improvement plans, response plans, etc.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006

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Facility Operations	1000-	Building Plans (supersedes item #D13)	These records document the "as-built" design and construction of school facilities. They include schematics for plumbing, electrical, architectural, structural, and mechanical features, specifications for products, materials and equipment that were used during construction, etc. The files may also contain operational and maintenance manuals and warranties. These records are used to support the maintenance of the facilities, and will be revised if changes are made to the infrastructure.	RETAIN UNTIL: Facility is no longer owned by the school district THEN: Destroy	9/5/2006
Facility Operations	1001-	Construction Close-out Files	These files are used to maintain property after it is constructed or installed. They may include maintenance manuals, equipment inventories, parts lists, warranties, etc.	RETAIN UNTIL: Item is replaced or disposed of THEN: Destroy	9/5/2006
Facility Operations	1002-	Shop Drawings	Engineers submit drawings with specifications for equipment that will be used and purchased. These drawings are used to ensure that the product is installed properly.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	9/5/2006
Facility Operations	1003-	Work Orders--Warranty	These records document maintenance work performed on school facilities, and supports the warranty of the property. Work orders may be issued for preventative maintenance and repairs to the grounds and buildings. Information in the work order may include the dates opened and closed, staff who performed the maintenance work, parts and materials that were purchased, descriptions of the problem, etc.	RETAIN UNTIL: Warranty expires THEN: Destroy	9/5/2006
Facility Operations	1004-	Work Orders--No Warranty	These records document maintenance work performed on school facilities that do not have a warranty. Work orders may be issued for preventative maintenance and repairs to the grounds and buildings. Information in the work order may include the dates opened and closed, staff who performed the maintenance work, parts and materials that were purchased, descriptions of the problem, etc.	RETAIN UNTIL: Work is completed THEN: Destroy	9/5/2006
Facility Operations	1005-	Asbestos Removal Plans	The Hazard Emergency Response Act (HERA) requires schools to develop and update management plans for the removal of asbestos every 3 years. These files also include inspection reports that are produced every 6 months, and annual public notices.	RETAIN UNTIL: Facility is no longer owned by the school district THEN: Destroy	9/5/2006
Facility Operations	1006-	Pollution Prevention Plans	Pollution Incident Prevention (PIP) plans are developed to ensure that fuel tanks do not become pollution hazards.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006
Facility Operations	1007-	Key Authorization	These records are used to track employees who have been assigned keys to the facilities. They may identify the person's name, employee identification number, date issued/returned, key code, the person authorizing the issuance of the key, etc.	RETAIN UNTIL: Key is returned THEN: Destroy	9/5/2006
Facility Operations	1008-	Licenses and Permits	This file contains legally required permits and licenses for regular operation of school facilities and services, as well as construction. It includes building permits, elevator permits, etc.	RETAIN UNTIL: Expiration date PLUS: 1 year THEN: Destroy	9/5/2006
Facility Operations	1009-	Inspection Certificates	These certificates document that facilities have passed safety inspections. They are maintained for the boiler, electrical system, vehicles, fire marshal plan approvals, fire marshal occupancy approvals, etc.	RETAIN UNTIL: Certificate is replaced by a new version, or equipment/building is no longer owned THEN: Destroy	9/5/2006
Facility Operations	1010-	Hazardous Material Safety Data Sheets	Federal law [OSHA 29 CFR1910.1200.g] requires that employers provide Material Safety Data Sheets to staff regarding any hazardous material on the premises. These sheets include information about the product manufacturer, composition, physical and chemical properties, identification of hazards, fire hazard, accidental release measures, handling and storage, first aid measures, toxicology, ecological information, disposal and transport considerations, regulatory information, etc. These records are maintained where they are readily available by employees working with or near the materials.	RETAIN UNTIL: Hazardous material is no longer used or stored on school property PLUS: 30 years THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Facility Operations	1011-	Warehouse Inventory	These records are used to keep track of items that are stored at the warehouse including office supplies, computers, furniture inactive records, etc.	RETAIN UNTIL: Item is shipped to a school district building, is sold as surplus, or is destroyed PLUS: 1 year THEN: Destroy	9/5/2006

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Food Service	1100-	Meal Production Records	These records document the amount of food that is planned, prepared and served each day by building. They may list the menu items, the approximate number of meals, serving sizes, the date, temperatures of food, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1101-	Monthly Reports	These reports are used to calculate the number of meals that are sold at each building within each category. They are used to produce the monthly claim.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1102-	Daily Participation Record/Edit	These records provide the daily meal counts by building and by category for the month, and are used to prepare the monthly claim.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1103-	Monthly Claim (supersedes item #H5b)	Claim forms (SM-4012-SL) are submitted to the Michigan Department of Education on a monthly basis to request reimbursement for paid, reduced and free meals. They may identify the number of meals served by category for breakfast and lunch by building, the number of students enrolled in each building, the number of students approved for free and reduced meals, the number of serving days within each month, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1104-	Local Education Agency Review System (LEARS)	School districts use the LEARS to submit information annually to the Michigan Department of Education about the number of students eligible for reduced and free meal benefits and the accuracy of benefit assignment.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1105-	Student Meal/Family Applications (supersedes item #H5a)	These applications are submitted for each family with students in the school district for participation in school meal programs. They are also used to identify eligibility for free or reduced price meals in accordance with U.S. Department of Agriculture guidelines. The applications may contain the student name, school building, grade, parental income, social security number, address, phone number, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1106-	Verification of Meal Application and Summary	Districts use these records to verify that students are eligible to receive free or reduced priced meals. These files may contain the applications that were selected for verification, letters to parents, income verification documents, summaries of the verification process, etc. Reports are submitted using LEARS.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1107-	Inventory (supersedes item #H5c)	This is a monthly inventory of the food and supplies on hand. It may list the item name, code, cost, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1108-	Health Department Inspections (supersedes item #H5e)	Local health departments conduct on-site inspections of production and service kitchens. These files may include correspondence, inspection reports, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1109-	Commodity Consortium	Some school districts participate in a consortium to assist with the purchasing of food and supplies. USDA commodity foods could be diverted to the consortium. These records identify which food items were ordered and delivered, where they are physically located in the delivery process, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1110-	Commodity Consortium Order Summaries	These records document the commodity orders for the next school year.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1111-	Commodity Fair Share/Bonus Surplus Order	These records document orders for deliveries of commodities.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Food Service	1112-	Debit Accounts	These records are used to track the balance in each student's debit account. They may also be used to produce summary reports and meal histories. The information may include student name, student identification number, building, grade, status, amount deposited, amount spent, daily balance, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1113-	After School Snack Program Reports	Daily reports are used to compile a monthly report that calculates the number of snacks that are provided to students participating in after school programs for reimbursement. The reports identify which food and beverage items were served, the amount consumed, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1114-	After School Snack Program On Site Reviews	These reviews are completed by the local school district within the first four weeks of the snack operation. The second review is completed after January 1. They are submitted to the Michigan Department of Education.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1115-	Summer Food Service Program Claims (SM-4012-SF)	These documents are used to submit monthly claims for meals provided to students participating in summer school. They may include daily meal counts by site, site reviews, daily production reports, applications, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1116-	Summer Food Service Program Application/Renewal (SM-4012-A/R)	These records document enrollment in the Summer Food Service Program. They include information that is submitted about food production sites, buildings where food is served and prepared, school names and addresses, enrollment, contact information, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1117-	Year End Reports	These reports are submitted at the end of the school year to the Michigan Department of Education. The reports identify the revenue and expenses by accounting categories and meal programs, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1118-	Building On-site Reviews/Inspections	These inspections are conducted annually by the local school district by February 1 of each school year. They are submitted to the Michigan Department of Education. They are used to support auditing of menus, pricing, sanitation and other factors.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1119-	Coordinated Review Effort Report (CRE)	These audits are conducted by the Michigan Department of Education on a 5-year cycle to verify compliance with the requirements of school meal programs so districts can receive reimbursement for qualified expenses.	RETAIN UNTIL: Fiscal year ends PLUS: 5 years THEN: Destroy	9/5/2006
Food Service	1120-	Nutrition Analysis/School Meals Initiative Review Report	These records document the nutrition analysis of school lunch and breakfast programs to ensure schools are following USDA recommended dietary guidelines. Analyses are performed on a 5-year cycle, and are retained in accordance with 7 CFR 210.20 and 220.14. These files may contain menus, nutrition labels, recipes, final analysis reports, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 5 years THEN: Destroy	9/5/2006
Food Service	1121-	Miscellaneous Revenue	These records document various sources of food revenue, such as catering, special events, adult sales, etc. They are used for event planning and billing. They may identify the group or event name, date, location, customer, number of people, menu, billing information, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Food Service	1122-	Civil Rights Compliance	These records contain civil rights self-evaluation forms that list the number of students and employees by ethnic categories.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Transportation	1200-	Vehicle Files (supersedes item #H4a, J4e-f)	These files document all vehicles in the school district's fleet, including buses. They may include the registration, title, bus repair orders, documentation of all maintenance work that is performed, State Police inspections, etc.	RETAIN UNTIL: Vehicle is no longer owned by the school district THEN: Destroy	9/5/2006
Transportation	1201-	Student Trips	These files document when school buses are used to provide transportation for trips both inside and outside of the school district. These activities may include same-day field trips, overnight trips, athletic trips, etc. These files may include transportation request forms, trip mileage reports, itineraries, driver information, copies of driver meal reimbursements, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Transportation	1202-	Student Transportation Conduct Report	These documents are completed for each incident that occurs on a school bus. They may identify the date of the incident, student's name, school, grade, whether previous reports have been filed for that student, driver name, bus number, a description of the incident, parental signature, etc. Reports for severe offenses may be kept longer and may be copied into the student file (see item #1400B).	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Transportation	1203-	Driver Inspection Report	Drivers must inspect buses and complete this report. This report is used to identify maintenance or repair work that is needed. The Michigan State Police may use these reports when they conduct their annual inspection of the buses. They may identify the driver's name, bus number, date, mileage, gallons of fuel, quarts of oil, equipment that was inspected, etc. If maintenance work was performed, the garage staff may input comments.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Transportation	1204-	Bus Stop Review	These documents are used to request that the location of bus stops be reviewed. They may include the date, driver's name, bus number, stop location, route, reason for the request, concerns, actions taken, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Transportation	1205-	Running Red Light Report	Bus drivers report when a vehicle runs the red light or stop sign on the bus when the bus has stopped for passengers. It may be submitted to the public safety department, the city police and/or county sheriff. These reports often result in a ticket being issued to the offending driver, and that driver may contest the charge. The reports may include the date, bus driver's name, bus number, location of the incident, time of incident, number of road lanes, weather conditions, incident description, description of vehicle and driver, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Transportation	1206-	Incident Reports	These reports are completed for miscellaneous incidents, such as when a driver hits a mailbox, a student falls on steps or icy sidewalks, etc. They may identify the driver's name, bus number, person's involved, incident description, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Transportation	1207-	Vehicle Crash Files	These files document crashes involving school vehicles. They may include Traffic Crash Report (UD-10), correspondence, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	9/5/2006
Transportation	1208-	Dangerous Railroad Crossing Reports	These reports are completed when a railroad crossing is not functioning properly. A copy of the report is sent to the company responsible for the crossing.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Transportation	1209-	Fuel Log	This invoice is received from the company supplying fuel to the school district. It may identify the number of gallons sold, cost per gallon, bus number, driver, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Transportation	1210-	School Bus Schedules	These records document the routes taken by the district's buses. They contain the time and location of each stop on the route.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	12/7/2010

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Television Services	1300-	Finished Recording Products	Recordings may be produced of school board meetings, sporting events, theatrical productions, concerts, award ceremonies, etc. The finished product may be the edited version of raw footage, or it may be a recording of a live event that is unedited. Finished products are aired by the television station. Due to the fact that recording technology changes over time, and the fact that recording media degrades over time, recordings will need to be migrated periodically to ensure that they remain accessible.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records.</i>	9/5/2006
Television Services	1301-	Raw Footage	Raw footage of events may be edited prior to airing on the television station.	RETAIN UNTIL: Finished product is completed THEN: Destroy	9/5/2006
Television Services	1302-	Production Schedules	These schedules identify events that will be recorded. They may include the date, time, event, location, staff assignment, recording length, camera type used, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	9/5/2006
Television Services	1303-	Program Schedules	These schedules identify which programs will be aired by the television station. They may include the date, time, program length, program topic, etc. Message boards/bulletins may be aired by the television station when scheduled programming is not available.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	9/5/2006
Television Services	1304-	Recording Inventory	This inventory lists all recordings that are maintained of past events. They may identify the recording number, date, event, length, format, etc. The inventory is updated as new recordings are added and older recordings are destroyed.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools--Student Records	1400A-	Student Files--Academic Records (CA-60) (supersedes item #1-11, 13)	These files are maintained on each student and follow the student from enrollment through graduation, transfer or withdrawal. Personal information about the student may be collected on the CA-60 form/folder or on some other form that is used by the school district. Other documents in the file may include a photo for each school year, transcripts, approved personal curriculums, withdrawal documents, GED test results, etc. Note: This record series also applies to adult education students. The home school district is the official recordkeeper for the academic records of students who participate in cooperative education programs, including technical education. Cooperative education programs must send the official records to the home district.	RETAIN UNTIL: Student graduates PLUS: 60 years THEN: Destroy NOTE: If a student drops out, the records remain active until the expected graduation date. Schools are responsible for retaining records of students who transfer to another school district until the next school district requests the student's file (MCL 380.1135 (4)). Intermediate School Districts may coordinate the retention of, or retain themselves, the student records of closed public schools and public school academies (if the files are not transferred to another open school) for the remainder of their retention period.	12/7/2010
Schools--Student Records	1400B-	Student Files--Other Records (supersedes item #16, 19-23, 26-27)	Select documents in the student file only need to be retained while the student is enrolled and may be destroyed upon graduation (or expected graduation date). These documents may include: most recent enrollment records and emergency contact information, school of choice applications, attendance records, report cards, academic progress reports, educational development plans (EDP), immunization records, court orders (relating to divorce, custody, foster care, etc.), disciplinary records (including police reports, suspension or expulsion notices, etc.), age of majority release forms, social developmental evaluations, non-special education service notes and assessments and evaluations, language assessments, and relevant correspondence. Note: This record series also applies to adult education students.	RETAIN UNTIL: Student graduates. THEN: Destroy NOTE: If a student drops out, the records remain active until the expected graduation date. Schools are responsible for retaining records of students who transfer to another school district until the next school district requests the student's file (MCL 380.1135 (4)).	12/7/2010
Schools--Student Records	1401-	Vision and Hearing Screening Tests (supersedes item #17-18)	These tests are conducted on elementary age students to identify if vision or hearing problems will affect their academic progress. These records may be retained within the student's file.	RETAIN UNTIL: Student completes the 6th grade THEN: Destroy NOTE: Schools are responsible for retaining records of students who transfer to another school district until the next school district requests the student's file(MCL 380.1135 (4)).	9/5/2006
Schools--Student Records	1402-	Doctor's Medical Orders	These orders are signed by the student's physician or parent/guardian to authorize the school to provide medication, services or accommodations to a student while at school. They contain the physician's instructions. New orders are completed at the beginning of the school year or when a change occurs.	RETAIN UNTIL: Replaced by a new order, until a doctor determines that it is no longer required, or at the end of the school year, whichever is shorter THEN: Destroy	9/5/2006
Schools--Student Records	1403-	Personal Protection Orders	These court orders identify people who are not allowed to have contact with an individual student.	RETAIN UNTIL: Order expires THEN: Destroy	9/5/2006
Schools--Student Records	1404-	Proof of Residency (supersedes item #5)	These records document that a student is eligible to attend schools within the school district without paying tuition fees. These records may be retained within the student's file.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006

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Schools--Student Records	1405-	Student Testing Data (supersedes item #22)	These records contain individual student testing data for state administered standardized tests. They may be used to grant Michigan Merit Awards to students. These records may be retained within the student's file.	RETAIN UNTIL: Student graduates PLUS: 5 years THEN: Destroy	9/5/2006
Schools--Student Records	1406-	Student Work Permits (supersedes item #14-15)	Minors over the age of 14 must have a work permit prior to beginning work. Schools must approve the work permit, and new permits are required for each new job held by the teenager. These records may include the completed permit forms, job offers, approved deviations, correspondence, injury reports, workers compensation documents, work/school training agreements/contracts, etc.	RETAIN UNTIL: Student graduates PLUS: 7 years THEN: Destroy	9/5/2006
Schools--Student Records	1407-	Student Information System	School districts may maintain electronic data about enrolled students. This data may include student and parent names, addresses, birth date, gender, graduation year, grade level, language, race, residency status, student identification number, emergency contact information, immunizations, grades, class schedule, attendance, assessment scores, disciplinary information, bus assignments, etc. Select fields, such as emergency contacts, bus and locker assignments, medication orders, class schedules, etc. will be modified as the data changes. Other fields, such as grades and test scores contain cumulative data.	RETAIN UNTIL: Student graduates, transfers or withdraws from school THEN: Destroy	9/5/2006
Schools--Student Records	1408-	Disclosure Records (supersedes item #28)	These records document parties who have requested or obtained personally identifiable information about a student, and the legitimate interests these parties had in requesting or obtaining the information.	RETAIN UNTIL: Student's academic record (see item #1400A) is destroyed THEN: Destroy	9/5/2006
Schools--Student Records	1409-	Amendment/Destruction Records	These records document requests and authorizations to amend or destroy documents in a student's file.	RETAIN UNTIL: Student's academic record (see item #1400A) is destroyed THEN: Destroy	9/5/2006
Schools--Student Records	1410-	Student Census (obsolete) (supersedes item #IIIE)	These records identify all students who attended each school for each school year. They may identify the students, parents, address, birth date, etc. These records possess historical value and schools are strongly encouraged to retain them permanently.	RETAIN UNTIL: Date created PLUS: 60 years THEN: Destroy <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records.</i>	9/5/2006
Schools--Student Records	1411-	Record Transfer Requests	These records document that another school district requested the transfer of a student's file and that the file <u>was sent</u> to the other school district. School districts may select to retain a copy of the records that are transferred to the other school district, however, they are not required to do so. If they do retain copies, those copies are "nonrecords." Note: This record only needs to be retained if it is the only remaining evidence that the student once attended the school.	RETAIN UNTIL: Date created PLUS: 4 years THEN: Destroy	12/7/2010
Schools--Student Records	1412-	Special Program Authorizations and Documentation	These files document tutoring and other services that are provided to students through special programs, such as the Title I program. They include authorization forms signed by parents allowing their child to participate in the program.	RETAIN UNTIL: No longer required by the rules of the funding program THEN: Destroy	12/7/2010

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Schools--Building Administration	1500-	Accreditation--Work Papers	School buildings may choose to be accredited by various organizations. These files may include school improvement plans, reports, goals and objectives, school profiles, evidence of performance, field inspection documentation, etc.	RETAIN UNTIL: Replaced by a new version or expired THEN: Destroy	9/5/2006
Schools--Building Administration	1501-	Accreditation--Certificate	These documents are prepared by the accreditation organization to document the school building's status.	Permanent	9/5/2006
Schools--Building Administration	1502-	Gradebooks (supersedes item #24)	These records are compiled by teachers throughout the school year. They may contain student names, grades, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	9/5/2006
Schools--Building Administration	1503-	Daily Lesson Plans/Objectives (supersedes item #25)	These records are created and maintained by teachers to plan class assignments related to each curriculum objective. They are modified each year to address new curriculum standards and the learning needs of the students.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Schools--Building Administration	1504-	School Nursing Records	These records document services provided by the school nurse. They may include logs, reports, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Schools--Building Administration	1505-	Summary Testing Data	These records document student performance on MEAP and other standardized tests. Reports will document the scores of all students who took the test.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	9/5/2006
Schools--Building Administration	1506-	Locker Log	This log identifies student locker assignments. It may contain the student's name, locker number, lock combination, etc.	RETAIN UNTIL: Fiscal year ends THEN: Destroy	9/5/2006
Schools--Building Administration	1507-	Student Trips	These files are maintained on all student trips, including same-day field trips, overnight trips, etc. They may include health forms, itineraries, proof of insurance, driver information, permission slips, transportation request forms, trip mileage reports, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Schools--Building Administration	1508-	Facilities Scheduling	These files are used to schedule school facilities for group activities or events. They may include internal request forms and rental agreements. These documents may contain the customer contact information, reservation information, reservation number, etc. This information may be used to generate confirmation letters, building event schedules, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	9/5/2006
Schools--Building Administration	1509-	Pool Log	This log documents who used the school swimming pool. It may contain the date, time, name of the teacher or group, the number of people, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	9/5/2006
Schools--Building Administration	1510-	Student Handbooks	These handbooks are published annually and are distributed to students and their parents to document district and school policies.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i>	9/5/2006
Schools--Building Administration	1511-	Student Directories	These directories list all students attending the school. They may contain grade, classroom, student name, address, phone number, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i>	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools--Building Administration	1512-	Curriculum Guides	These guides are published annually and are approved by the district's board of education. They may describe the courses that are offered by the district, the requirements for graduation, off-campus educational opportunities that are available, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i>	9/5/2006
Schools--Building Administration	1513-	Teacher Handbooks	These handbooks are published annually and are distributed to teachers to document employee policies, procedures, expectations, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i>	9/5/2006
Schools--Building Administration	1514-	Teacher Directory	These district-wide guides are published annually, and identify the teacher's name, school, grade, phone number, and address.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i>	9/5/2006
Schools--Building Administration	1515-	Yearbook	These books are published annually to document the students, teachers and staff of the school. They contain photographs and information about athletic teams, clubs and special events, etc. during the school year.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i> <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records</i>	9/5/2006
Schools--Building Administration	1516-	Graduation Program	These programs are used to document commencement exercises.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i> <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records</i>	9/5/2006
Schools--Building Administration	1517-	Drivers Education	These files document drivers' education courses that may be offered by the school district. They may include student rosters, grade books, copies of learner's certificates, accountability reports that are submitted to the Secretary of State for reimbursement, curricula, exams, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 4 years THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools--Building Administration	1518-	Special Event Files	These files document field days, concerts, theatrical programs, art exhibits, award programs, etc. They may include rosters, programs, flyers, schedules, financial information, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes</i> <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records</i>	9/5/2006
Schools--Building Administration	1519-	Schools of Choice Applications—Denied	These records document that a school of choice application was denied, regardless of the reason for the denial. Applications may be denied because the student missed the application deadline, because they were expelled or suspended within the past 2 years, because the student applied for a grade, school or program they were not eligible for, because enrollment is full and they are on a waiting list, etc. Note: approved applications are retained in the CA-60 (see item #1400B).	RETAIN UNTIL: End of the school year for which the student applied THEN: Destroy	12/7/2010

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Schools--Guidance Counseling	1600-	Student Counseling Files	Guidance counselors may create files for each student that they assist. These files may contain correspondence and notes about student issues and concerns.	RETAIN UNTIL: Counselor is assigned to provide services to the student THEN: Destroy	9/5/2006
Schools--Guidance Counseling	1601-	Child Support Teams	These files document meetings with teachers, parents, students and guidance counselors to develop an action plan for general education students who need assistance with academic and behavior issues. The files may contain notes, action plans, progress reports, correspondence, testing, etc.	RETAIN UNTIL: Counselor is assigned to provide services to the student THEN: Destroy	9/5/2006
Schools--Guidance Counseling	1602-	Accommodation (Section 504) Plans	These plans are prepared to accommodate the needs of non-special education students with disabilities, including ADHD, depression, dyslexia, etc. The files may contain plans, notes, correspondence, progress reports, grades, testing, etc.	RETAIN UNTIL: School district is no longer providing services in accordance with the plan PLUS: 3 years THEN: Destroy	9/5/2006
Schools--Guidance Counseling	1603-	Educational Development Plans (supersedes item #21)	These plans are developed to assist students with preparing for their future. They may identify how students will prepare for their future through career education, jobs, community service and extra-curricular activities, including athletics. Students may be tested to identify their interests and skills so suggestions can be made about career pathways and high school course work. These files may include test results, plans, etc.	RETAIN UNTIL: Replaced by a new plan or the student graduates, whichever is sooner. THEN: Destroy NOTE: If a student drops out, the records remain active until the expected graduation date. Schools are responsible for retaining records of students who transfer to another school district until the next school district requests the student's file (MCL 380.1135 (4)).	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools--Special Education	1700-	Special Education Student Files	<p>These records document the services that are provided to special education students including speech therapy, occupational therapy, physical therapy, social workers, etc. Special education student files may be kept separately from the CA-60 or they may be combined. These files may include evaluations, referrals, multidisciplinary evaluation team (MET) summaries, achievement tests, progress reports, permission forms, nursing notes, height and weight charts, doctor evaluations, psychological reports, therapy reports and scripts, behavioral plans, releases and permissions, vocational information, due process hearings, correspondence, Section 53 qualification documents, etc.</p> <p><i>Note: 34 CFR 300.573 states that schools "shall inform parents when personally identifiable information collected, maintained, or used under this part is no longer needed to provide educational services to the child. (b) The information must be destroyed at the request of the parents. However, a permanent record of a student's name, address, and phone number, his or her grades, attendance record, classes attended, grade level completed, and year completed may be maintained without time limitation."</i></p>	<p>RETAIN UNTIL: Student graduates PLUS: 3 years THEN: Destroy NOTE: If a student drops out, the records remain active until the expected graduation date. Schools are responsible for retaining records of students who transfer to another school district until the next school district requests the student's file (MCL 380.1135 (4)).</p>	9/5/2006
Schools--Special Education	1701-	Individual Education Plans (IEP) (supersedes item #12)	<p>These plans are developed primarily for special education students to identify education goals and services that will be provided by the school district to assist the student. These plans are updated at least once a year.</p>	<p>RETAIN UNTIL: Date created PLUS: 6 years THEN: Destroy</p>	9/5/2006
Schools--Special Education	1702-	Pupil Accounting (supersedes item #IID)	<p>The December 1 special education headcount is conducted annually and is reported to the Michigan Department of Education using MiCIS. The EETRK database is used to report early on students for federal funding. The report includes the student name, building, grade level, UIC code, eligibility code, etc. Supplementary records may include student rosters, resident district summaries, count day process, count day absence log, homebound summaries, transition/work study summaries, clock hours of instruction, audit summaries, etc. Other special education student count reports that are submitted to the Michigan Department of Education or the U.S. Department of Education shall also be retained for 5 years.</p>	<p>RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy</p>	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools--Early Childhood Education	1800-	At-Risk Student Files	At-Risk programs are offered to children age 3-5. Student files may include applications, individual education plans, evaluations, CA-60, risk factor analyses, progress reports, etc. If the child remains in the school district after age 5, this file will be transferred to the kindergarten and will become part of the student's file (see item #1400). If the child leaves the school district prior to kindergarten enrollment, the file will be transferred to the central administration office.	RETAIN UNTIL: Student leaves the program, and does not enroll in kindergarten with the school district PLUS: 7 years THEN: Destroy	9/5/2006
Schools--Early Childhood Education	1801-	Michigan School Readiness Program Student Files	MSRP programs are offered to children age 4. Student files may include applications, individual education plans, evaluations, CA-60, risk factor analyses, report cards, etc. If the child remains in the school district after age 4, this file will be transferred to the kindergarten and will become part of the student's file (see item #1400). If the child leaves the school district prior to kindergarten enrollment, the file will be transferred to the central administration office.	RETAIN UNTIL: Student leaves the program, and does not enroll in kindergarten with the school district PLUS: 7 years THEN: Destroy	9/5/2006
Schools--Early Childhood Education	1802-	Early On Student Files	Early On serves eligible children age 0-3 who have disabilities, developmental delays or other special needs. Student files may include evaluations, referrals, multidisciplinary evaluation team (MET) summaries, Individualized Family Service Plans (IFSP), Individualized Education Program Team (IEPT) reports, progress reports, medical evaluations, psychological records, therapy reports and scripts, releases, permissions and transition plans. If the child is eligible for enrollment in another early childhood program upon exit from Early On at age 3, the file will be transferred to that school district or preschool program.	RETAIN UNTIL: Student leaves the Early On program, and does not enroll in another early childhood program PLUS: 7 years THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools--Library	1900-	Library Catalog/Circulation	This record is used to document the district-wide use of library materials and media equipment. It may contain item-level catalog information for books and periodicals, individual patron information, an item-level equipment inventory, etc. It is used to identify which items are available and which have been checked out.	RETAIN UNTIL: Item is deaccessioned; until student graduates, transfers or withdraws; or until staff employment ends THEN: Destroy	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools--Athletics	2000-	Coach Directory	This directory lists coaches who work for the school district. It may contain the coach's name, address, phone number, e-mail address, etc.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006
Schools--Athletics	2001-	Coaches Handbook	This handbook is provided to all coaches to inform them about policies and procedures that are established by the school district and the Michigan High School Athletic Association (MHSAA).	RETAIN UNTIL: Replaced by a new version THEN: Destroy	9/5/2006
Schools--Athletics	2002-	Student Athlete Files	These files are maintained on all student athletes. They may include eligibility evaluations, annual consent forms and physical exams, an agreement to comply with the handbooks or rules, etc.	RETAIN UNTIL: Student graduates. If a student drops out, the records remain active until the expected graduation date. THEN: Destroy	9/5/2006
Schools--Athletics	2003-	Student Eligibility Reports (supersedes item #H2c)	These reports are generated to determine if student athletes continue to be eligible to participate in athletic activities.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	9/5/2006
Schools--Athletics	2004-	Officials Contracts (supersedes item #H2a)	Officials who work at athletic events may execute contracts with the school district for each event that they officiate. The contract may identify which event they are working at, the amount they will be paid for that event, etc.	RETAIN UNTIL: Expiration date PLUS: 6 years THEN: Destroy	9/5/2006
Schools--Athletics	2005-	Season History (supersedes item #H2d)	These records are generated each season for each team. They may identify the school, sport, year, competition level, coaches, opponents and scores for each game and tournament, athletes names and grades, team captains, league standings, honors, school records, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes.</i> <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records.</i>	9/5/2006
Schools--Athletics	2006-	Athletic Memorabilia	School districts are strongly encouraged to permanently preserve programs from athletic events, team photos, and trophies and awards won by varsity teams for major competitions (such as conference/league championships and MHSAA championships) in the school library or administration offices for historical purposes.	RETAIN UNTIL: No longer of use for reference THEN: Destroy <i>School districts are strongly encouraged to keep one copy permanently in the school library or administration offices for historical purposes.</i> <i>Schools are encouraged to contact the Archives of Michigan prior to disposing of these records.</i>	9/5/2006

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Professional Development	2100-	Curriculum Development	School district professionals attend programs about prevention, health, literacy and other issues. Some of these programs are developed by the school district that is offering the program. These files may include meeting records, research/data, strategic planning, facilitator/ instructor materials, student materials, evaluations, etc.	RETAIN UNTIL: Course is no longer offered PLUS: 5 years THEN: Destroy	9/5/2006
Professional Development	2101-	Attendance Records	This record is used to keep track of which courses that school employees have taken. It may include the attendee name, social security number, work and home addresses, sex, race, school district, county, phone number, mailing list codes, courses taken, etc.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	9/5/2006
Professional Development	2102-	Course Files	Files document each time a course is offered. They may include expectations/outcomes, registrations, instructor contact information, continuing education units, etc.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	9/5/2006
Professional Development	2103-	Course Catalog	This catalog contains information about courses that are offered. They may identify the course title and description, date, time, location, presenter, cost, materials, etc.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	9/5/2006
Professional Development	2104-	Class Lists and Evaluations	These records identify who attended each course that was offered and their evaluations of the program.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	9/5/2006

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Community Education	2200-	Community Recreation	These records are used to register people for community recreation programs, such as pre-school, aquatics, youth and adult enrichment, athletic leagues, etc. They may contain names, addresses, phone numbers, payment information, classes taken, etc.	RETAIN UNTIL: Date created PLUS: 1 year THEN: Destroy	9/5/2006
Community Education	2201-	Rosters	These records document the players assigned to each team on various athletic leagues. They may contain names, phone numbers, etc.	RETAIN UNTIL: Date created PLUS: 1 year THEN: Destroy	9/5/2006
Community Education	2202-	Certificated Classes	These classes prepare students for certification in CPR, first aid, lifeguard, real estate, health department, etc. The files may include exams, answer sheets, pass/fail grades, personal contact information, etc.	RETAIN UNTIL: Expiration of the certificate THEN: Destroy	9/5/2006
Community Education	2203-	Child Care	These records document the children that are enrolled in pre-school and before/after school child care programs. They may contain registration information, emergency contact information, immunization and other health information, field trip permission slips, etc.	RETAIN UNTIL: Child is no longer enrolled in the program PLUS: 1 year THEN: Destroy	9/5/2006
Community Education	2204-	Child Care Billing	This record is used to generate bills for child care services. It may contain personal contact information, enrollment information, attendance, etc.	RETAIN UNTIL: Child is no longer enrolled in the program PLUS: 1 year THEN: Destroy	9/5/2006