

Guidelines for Disposal of Records

The Montgomery County Public Records Commission has approved the request for authorization to destroy the records listed on the following three sheets after being retained for the indicated time frame. Only these records can be destroyed without asking permission. If an item is not listed, or if you are unsure whether or not a record falls into one of the listed categories, please call Deede Bagwell in Business Affairs at 920-7899.

Items listed in the “Shred Only” column must be shredded. Also, limit shredding to these documents. **Any records with social security numbers or other sensitive information must be shredded!**

Items listed in the “Throw Away Only” column may be destroyed by recycling or placing them in your school dumpster. It is requested that you space them out over several days so as not to overload the dumpsters.

IMPORTANT: One of the conditions for having continuing authority to destroy these records is that we must report to the county on a reoccurring basis when these records have been destroyed. In order to accomplish this, you will need to notify the Business Office and give the type of record, total number of boxes or equivalent, and the year(s) of the records destroyed in accordance with the approved retention schedule. Please send this information by September 30th of each year. **School Records Disposal Reporting Form [BUS-F013](#)** is available for this purpose on the web under the Master Document List. This form can be completed on-line and printed.

Record Disposal What Can be Disposed

Department/Location: Accounting Dept./Individual School Accounting

| | Shred ONLY DO NOT PLACE IN TRASH OR RECYCLE BIN | Discard After Retention Period | Throw Away ONLY Trash or Recycle Bin DO NOT SHRED ONLY THROW AWAY * | Discard After Retention Period |
|----|--|---|--|---|
| 1 | Bank Statements (ISA & SSO) | 5 years | Paid Invoices | 5 years |
| 2 | Cancelled Checks/Images of Checks | 5 years | Journal Adjustments/Journal Vouchers | 5 years |
| 3 | Copies of Checks (Parents & Others) | 5 years | Transfer of Funds Forms | 5 years |
| 4 | Credit Card Statements | 5 years | Purchase Orders/Supporting Documents | 5 years |
| 5 | Free/Reduced Lunch List-Student Rosters | 5 years | Check Requests/Supporting Documents | 5 years |
| 6 | Student Fee Waiver Applications | 5 years | Receipts/Receipt Books | 5 years |
| 7 | | | Collection Logs | 5 years |
| 8 | | | Deposit Slips | 5 years |
| 9 | | | Monthly/Quarterly/Year-End Reports | 5 years |
| 10 | | | Inventory of School Assets | 5 years |
| 11 | | | Munis Claim Vouchers/Supporting Docs. | 5 years |
| 12 | | | Travel Authorizations | 5 years |
| 13 | | | Professional Leave Forms | 5 years |
| 14 | | | Correspondence Files (if no SS#) | 5 years |
| 15 | | | Transportation Report | 5 years |
| 16 | | | School Support Organization Documents | 5 years |
| 17 | | | Fundraiser ISO-9001 Forms/Documents | 5 years |
| 18 | | | Donation Files-Computer Reports & Docs | 5 years |
| 19 | | | Ticket Reconciliation Forms | 5 years |
| 20 | | | Yearbook Files-Computer Reports | 5 years |
| 21 | | | Board Allocation/Budget Reports | 5 years |
| 22 | | | General Ledger-ISA Before Closing Reports | 10 years |
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*Please Note: Some items containing sensitive data NEED to be shredded. Other items should only be disposed of by throwing away in a recycle bin or trash receptacle to avoid the cost of shredding.

Record Disposal What Can be Disposed

Department/Location: Special Education/Schools, Greenwood

| | Shred ONLY DO NOT PLACE IN TRASH OR RECYCLE BIN | Discard After Retention Period | Throw Away ONLY Trash or Recycle Bin DO NOT SHRED ONLY THROW AWAY * | Discard After Retention Period |
|----|--|---|--|---|
| 1 | Working Copies of IEP Goal Sheets | End of yer. | | |
| 2 | Teacher Copies of IEP At-a-Glance | End of yer. | | |
| 3 | Easy IEP Caseload List/Re-Evaluation Lists | End of yer. | | |
| 4 | Copies of IEP Progress Reports | End of yer. | | |
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Record Disposal What Can be Disposed

Department/Location: Student Services/Schools

| | Shred ONLY DO NOT PLACE IN TRASH OR RECYCLE BIN | Discard After Retention Period | Throw Away ONLY Trash or Recycle Bin DO NOT SHRED ONLY THROW AWAY * | Discard After Retention Period |
|----|--|---|--|---|
| 1 | Doctor's Excuses for Student Absences | End of yr. | Sign-In Sheets for Visitors | End of yr. |
| 2 | Parent/Office Communication | End of yr. | Classroom Split Lists | End of yr. |
| 3 | Student Emergency Cards | 1 year | Emergency Closing Records | End of yr. |
| 4 | Faculty/Staff Emergency Information | 1 year | Bus Lists | End of yr. |
| 5 | Requests for Records | 1 year | Five Day Absences Print Outs | End of yr. |
| 6 | Hardship Applications | 1 year | Sign-In Sheets for Students | 5 years |
| 7 | Student Discipline Records | 3 years | | |
| 8 | Bus Discipline Reports | 3 years | | |
| 9 | Withdrawal Forms | 3 years | | |
| 10 | Retention Reports | 3 years | | |
| 11 | Grade Verifications | 3 years | | |
| 12 | Dept. of Children Services Sign-In Sheets | 5 years | | |
| 13 | Attendance Records | 5 years | | |
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Record Disposal What Can be Disposed

Department/Location: Risk Management/Safety Department

| Shred ONLY DO NOT PLACE IN TRASH OR RECYCLE BIN | Discard After Retention Period | Throw Away ONLY Trash or Recycle Bin DO NOT SHRED ONLY THROW AWAY * | Discard After Retention Period |
|--|---|--|---|
| Health Services Documents | 2 years | Student Injury Reports | 16 years |
| BloodBorne Pathogens-Medical Records | Term of Employment + 30 years | Nursing documentation related to Student Injury | 16 years |
| | | Fire Safety Inspections | 5 years, unless active investigation |
| BloodBorne Pathogens-Employee Exposure Records | 30 years | BloodBorne Pathogens-Training Records | 3 years |
| Occupational Injuries/Illnesses | 5 years following end of the year to which records relate | Drug Testing Records | 5 years |
| | | Hazardous Materials Exposure Records | 30 years for health related allegations or significant adverse reactions; 5 years for all other allegations |
| Emergency Services Documentation | 10 years | | |
| DCS Documentation | 10 years | Material Safety Data Sheets | 30 years |

| DO NOT Dispose | Retention Period |
|-----------------------|-----------------------------|
| Immunization Records | Permanent Record |
| Insurance Policies | Permanent |

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