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*Secondary Schedule*

rev. 2002

RECORD RETENTION & DISPOSITION SCHEDULE FOR SCHOOL

REFERENCE SOURCES: *Records Management for Parishes and Schools*, compiled by David P. Gray, Association of Catholic Diocesan Archivists, 1987; *Managing Public Records, Common Records Retention and Destruction Schedules, A Guide for South Dakota Local Schools*, State of South Dakota Bureau of Administration, Records Management Program, 1985, pp. 54-60; *A Divine Legacy, Record Keeping for Religious Congregations/Orders*, compiled by Denis Sennett, S.A., Franciscan Friars of the Atonement, 1993

SHORT-TERM RECORDS: DESTROY AS NOTED

- Administrative: Academic Progress Reports (Teachers' Reports of Student Performance). [Destroy after 5 years; Shredding recommended.]
- Administrative: Accident Reports. [Destroy after 5 years; Shredding recommended.]
- Administrative: Attendance Calendars (Teachers' Reports of Students Attendance and Conferences with Parents). [Destroy after 5 years; Shredding recommended.]
- Administrative: Budget Files. [Destroy after 5 years; Shredding recommended.]
- Administrative: Bus Schedules. [Destroy when superseded.]
- Administrative: Business Files. [Destroy after 5 years; Shredding recommended.]
- Administrative: Class Schedules. [Destroy after 5 years.]
- Administrative: Class Test Record Sheet (Students' Test Scores to Determine Curriculum Strengths and Weaknesses). [Destroy after 1 year; Shredding recommended.]
- Administrative: Consents, Medical Treatment (Parent/guardians' consent of child emergency medical services). [Destroy after 5 years; Shredding recommended.]
- Administrative: Enrollment Cards. [Destroy after 5 years; Shredding recommended.]
- Administrative: Equipment and Instructional Resource File. [Destroy when superseded.]
- Administrative: Evaluations, Teacher. [Destroy after 5 years, provided no litigation concerning employment; Shredding recommended.]
- Administrative: Faculty Meeting Minutes. [Destroy after 5 years.]
- Administrative: Faculty Schedules. [Destroy after 5 years.]
- Administrative: Grade Reports. [Destroy after 5 years; Shredding recommended.]
- Administrative: Grant Files. [Destroy after 5 years; Shredding recommended.]
- Administrative: Health Record. [Destroy after 5 years; Shredding recommended.]

Administrative: Insurance Claim Files. [Destroy when superseded; Shredding recommended.]

SHORT-TERM RECORDS (CONTINUED): DESTROY AS NOTED

Administrative: Kindergarten Screening Report (Notes students' developmental stages). [Destroy after 5 years; Shredding recommended.]

Administrative: Lesson Plans. [Destroy when superseded.]

Administrative: Library Schedules. [Destroy when superseded.]

Administrative: Parent-Teacher Conference Files. [Destroy when superseded; Shredding recommended.]

Administrative: Physical Examinations (SDHSAA). [Destroy after 5 years; Shredding recommended.]

Administrative: Promotion Lists. [Destroy when superseded.]

Administrative: Property Inventory. [Destroy when superseded.]

Administrative: Psychological File. [Destroy after 5 years; Shredding recommended.]

Administrative: Reading Group Lists. [Destroy when superseded; Shredding recommended.]

Administrative: Reading Progress Card. [Destroy 5 years after students' last school year; Shredding recommended.]

Administrative: Release Requests (Required by Family Educational Rights and Privacy Act of 1975, PL 93-3580). [Destroy after 5 years.]

Administrative: Report Cards. [Destroy after 5 years; Shredding recommended.]

Administrative: Retention Lists (Students not Promoted). [Destroy when superseded; Shredding recommended.]

Administrative: Standard Test Scores. [Destroy after students' last school year; Shredding recommended.]

Administrative: Teacher Records. [Disregard: Records discontinued in 1940s.]

Administrative: Transfer of Record File (Documents school to school student record transfers). [Destroy after 5 years; Shredding recommended.]

Administrative: Working Papers of Principals. [Destroy when superseded; Shredding recommended.]

Administrative: Working Papers of Superintendent. [Destroy when superseded; Shredding recommended.]

Administrative: Wrestling Weight Permits (SDHSAA). [Destroy after 5 years; Shredding recommended.]

Athletics: Eligibility Records. [Destroy after students' last school year; Shredding recommended.]

Athletics: Expense Reports. [Destroy after 3 years; Shredding recommended.]

Athletics: Insurance Records. [Destroy when superseded; Shredding recommended.]

Athletics: Paid Bills (Concessions, Equipment, Supplies). [Destroy after 5 years; Shredding recommended.]

SHORT-TERM RECORDS (CONTINUED): DESTROY AS NOTED

Athletics: Receipts. [Destroy after 5 years; Shredding recommended.]

Athletics: Rosters. [Destroy when superseded.]

Athletics: Schedules (Practices, Training, Games). [Destroy when superseded.]

Athletics: Scorebooks. [Destroy when superseded.]

Athletics: Travel Authorizations. [Destroy when superseded.]

Athletics: Vouchers. [Destroy after 5 years.]

Financial: Bank Deposit Slips and Register. [Destroy after 5 years; Shredding recommended.]  
Financial: Bank Statements. [Destroy after 5 years; Shredding recommended.]  
Financial: Canceled Checks and Check Stubs. [Destroy after 5 years; Shredding recommended.]  
Financial: Carnival Records (Bank Statements, Ledgers, Deposit Slips, Receipts, Canceled Checks, Check Stubs). [Destroy after 3 years; Shredding recommended.]  
Financial: Cash Book (Daily Receipts and Disbursements). [Destroy after 5 years; Shredding recommended.]  
Financial: Charitable Gaming General Account Records [Destroy after 3 years; Shredding recommended.]  
Financial: Charitable Gaming Permits. [Destroy when superseded; Shredding recommended.]  
Financial: Charitable Gaming Specific Account Records [Destroy after 2 years; Shredding recommended.]  
Financial: Check Registers. [Destroy after 5 years; Shredding recommended.]  
Financial: Correspondence on Payments/Receipts. [Destroy after 5 years; Shredding recommended.]  
Financial: Expansion Fund Prospects. [Destroy when superseded; Shredding recommended.]  
Financial: Federal School Lunch Program (Correspondence, Schedules, Paid Bills, Vouchers, Receipts, Contracts, Inventories, Claim Requisitions). [Destroy after 3 years; Shredding recommended.]  
Financial: Grade and High School Collection Register. [Destroy after 7 years; Shredding recommended.]  
Financial: Loan Files. [Destroy after 5 years; Shredding recommended.]  
Financial: Paid Bills. [Destroy after 5 years; Shredding recommended.]  
Financial: Purchase Orders. [Destroy after 5 years; Shredding recommended.]  
Financial: Receipts. [Destroy after 5 years; Shredding recommended.]  
Financial: Special Collections. [Destroy after 7 years; Shredding recommended.]  
Financial: Tax Records (Corporate and Personal). [Destroy after 7 years; Shredding recommended.]

SHORT-TERM RECORDS (CONTINUED): DESTROY AS NOTED

Financial: Treasurer's Account Book. [Destroy after 7 years; Shredding recommended.]  
Financial: Vouchers. [Destroy after 5 years; Shredding recommended.]  
Library Records: Book Order File (Purchase Orders, Invoices). [Destroy after 5 years.]  
Library Records: Catalogs (Books, Equipment, Supplies). [Destroy when superseded.]  
Personnel: Certificates- Teachers and Principals. [Destroy when superseded; Shredding recommended.]  
Personnel: Employment Contracts. [Destroy 5 years after termination; Shredding recommended.]  
Personnel: Individual Files (Applications, Contracts, Evaluations, Resumes). [Destroy 10 years after termination; Shredding recommended.]  
Personnel: Job Descriptions. [Destroy when superseded.]  
Personnel: Payroll Journal. [Destroy when superseded; Shredding recommended.]  
Personnel: Social Security Withholding Records. [Destroy after 4 years; Shredding recommended.]

Personnel: Substitute Teacher Applications. [Destroy after 5 years; Shredding recommended.]  
Personnel: Tax Forms (W-2s, W-3s, W-4s). [Destroy after 5 years; Shredding recommended.]  
Personnel: Teachers' Fund for Retirement Reports (Contribution Records). [Destroy after 5 years; Shredding recommended.]  
Personnel: Time Cards. [Destroy after 2 years; Shredding recommended.]  
Personnel: Vacation and Sick Leave Forms. [Destroy after 5 years; Shredding recommended.]

PERMANENT RECORDS: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION AND MICROFILMING

Administrative: Accreditation Files (North Central Association of Colleges and Secondary Schools, DPI).  
Administrative: Annual Reports, including S.D. High School Activities Association.  
Administrative: Architectural Drawings and Specifications.  
Administrative: Booster Club Minutes.  
Administrative: Calendars (School Events).  
Administrative: Class Lists.  
Administrative: Class Rank Lists.  
Administrative: Construction Files.

PERMANENT RECORDS (CONTINUED): AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION AND MICROFILMING

Administrative: Correspondence- Official (School Policy, Diocesan Directives).  
Administrative: Correspondence- Routine. [After 1 year, selectively weed and destroy and transfer remainder to Marquette.]  
Administrative: Guidance Counselor Files. [Weed and merge with Permanent Record Card.]  
Administrative: History File (Letters, News clippings).  
Administrative: Parents' Newsletters.  
Administrative: Parent-Teacher Bulletins.  
Administrative: Parent-Teacher Organization Minutes.  
Administrative: Permanent Record Card (Complete record of students grades and attendance). [Retain permanent in office in original and/or microfilm formats.]  
Administrative: Photographs (Activities).  
Administrative: Reports to the Diocese.  
Administrative: School Board Files (Minutes, Resolutions, Correspondence, Memoranda, Regulations).  
Administrative: Subject Files (Correspondence, Memos, Rules, Schedules). [After 1 year, selectively weed and destroy and transfer remainder to Marquette.]  
Administrative: Superintendent's Memoranda and Directives.  
Athletics: Game Programs.  
Financial: Carnival Committee Minutes.  
Financial: General Ledger.  
Financial: Report to Diocesan Office of Education.  
Financial: School Fund Account Book.  
Jesuits (Personal): Letters.  
Jesuits (Personal): News clippings.  
Jesuits (Personal): Project Materials on Christianity, Society of Jesus, etc. (Writings).  
Jesuits (Personal): Project Materials on Lakota History and Culture (Writings).

Library Records: Acquisition List (Book Accession Record).  
Library Records: Annual Report.  
Student Projects: Publications

PERMANENT RECORDS: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION  
AND DIGITAL SCANNING

Administrative: History File (Photographs).

Jesuits (Personal): Photographs.

Jesuits (Personal): Project Materials on Christianity, Society of Jesus,  
etc. (Photographs).

PERMANENT RECORDS (CONTINUED): AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR  
PRESERVATION AND DIGITAL SCANNING

Jesuits (Personal): Project Materials on Lakota History and Culture  
(Photographs).

PERMANENT RECORDS: AFTER 6 YEARS, TRANSFER TO MARQUETTE FOR PRESERVATION  
AND REFORMATTING

Administrative: History File (Audio/Video Recorded Discussions and  
Interviews).

Jesuits (Personal): Audio/Video Recorded Discussions and Interviews.

Jesuits (Personal): Project Materials on Christianity, Society of Jesus,  
etc. (Audio/Video Recordings).

Jesuits (Personal): Project Materials on Lakota History and Culture  
(Audio/Video Recordings).

Student Projects: Project Materials on Lakota History and Culture  
(Audio/Video Recordings).

Student Projects: School Activities and Events (Audio/Video Recordings).