



LOCAL SCHOOLS

RECORDS RETENTION AND DESTRUCTION SCHEDULE

State of South Dakota

Bureau of Administration

Records Management Program

(605) 773-3589



DEPARTMENT OF
EXECUTIVE MANAGEMENT

BUREAU OF
ADMINISTRATION

PMB 01234

RECORDS MANAGEMENT PROGRAM
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MEMORANDUM

TO: Local School Officials

FROM: Mary Bisson
State Records Manager

SUBJECT: **Records Retention and Destruction Schedule Manual**

DATE: December 29, 2004

In 1967, the South Dakota Legislature established the Records Management Program and the Records Destruction Board. In the same act, the Legislature required every State agency to develop a records retention and destruction schedule and declared that “No record shall be destroyed or otherwise disposed of by any agency of the State unless it is determined by majority vote of such board (Records Destruction Board) that the record has no further administrative, legal, fiscal, research or historical value.”

According to Administrative Rule 24:52:11:01, any State government agency planning to destroy agency records shall notify the State Archivist 30 days before the date of the proposed destruction. The request shall include the name or title of the records, inclusive dates, information content of the records, and quantity. This rule applies to all records, including those granted exclusive or continuous disposal authorization by the Records Destruction Board, with the following exceptions: vouchers, original and copies, and supporting documents; warrants, original and copies, multiple copies of State publications stored in bulk; obsolete blank forms; photocopies of computer printouts; and original copies of records that have been legally reproduced under the provisions of SDCL 1-27-4.

The State Archivist has 30 days to certify that the records have no permanent value and may be destroyed, or to make arrangements to transfer the records to the archives. If the Archivist fails to make a recommendation within this time, the records may be destroyed, provided that the agency has received authorization from the Records Destruction Board.

Finally, if you have any questions about implementing this manual or about your records in general, please contact Records Management at 773-3589. We will welcome an opportunity to discuss the proper implementation of sound records management practices.

Procedure to Dispose of School Records Using this Manual:

- The School Board must adopt this manual as its Records Management Policy.
- Each School is required by law to retain a permanent list of all records destroyed pursuant to SDCL 1-27-19.
- According to Administrative Rule (ARSD 24:52:11:01) each School planning to destroy records shall notify the State Archivist 30 days before the date of the proposed destruction. The request shall include the name or title of the records, inclusive dates, information content of the records, and quantity.
- Records Management will review a School District's list of records that it plans to destroy to ensure the appropriate retention periods have been met. The list should include the following: Record series number and record title as listed in this manual and the inclusive dates of the records being destroyed.
- For records not listed in this manual, you must petition the State Records Destruction Board, which meets annually, for authority to dispose of records. Contact Records Management for assistance with this process:

Contact Information:

Records Management
Mary Bisson, Director
104 S Garfield Ave.
Pierre, SD 57501
Phone: (605) 773-3589
Fax: (605) 773-5955

State Archives
Chelle Somsen, State Archivist
Cultural Heritage Center
900 Governors Drive
Pierre, SD 57501
Phone: (605) 773-3615
Fax: (605) 773-6041

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STATE OF SOUTH DAKOTA
 RECORDS RETENTION &
 DESTRUCTION SCHEDULE
 AUTHORIZATION FORM
 (Std Form RM-1 Rev 1/03)

DEPARTMENT: State of South Dakota
 DIVISION: Political Sub-Divisions
 OFFICE: Local Schools
 PROGRAM: Administrative/Legal Services
 RECORDS OFFICER: Superintendent
 RM CUSTOMER #: _____

		R.D.B.
RECORD		AUTHORITY
<u>SERIES NO.</u>	<u>TITLE---DESCRIPTION---RETENTION AND DESTRUCTION SCHEDULE</u>	<u>NUMBER</u>

SCL-1 ADMINISTRATIVE REFERENCE FILES:

85-023

This series is maintained for convenience of reference by the school's administration. The files may contain, but are not limited to such topics as: prom, carnival, athletic banquet, awards, Boy's State, Girls State, and scheduling. Information is arranged alphabetically by topic.

RETENTION: Retain current in office. Destroy superseded or obsolete.

(Note: Cull files at least once a year to avoid a build-up of superseded or obsolete material.)

SCL-2 APPLICATIONS, FREE & REDUCED PRICE MEALS:

85-023

This series documents the application for free and reduced price meals submitted to the school district for review. Information in the application includes, but is not limited to: name, address, name(s) of children, school, grade, adults living in household, total number of household members, income, income reporting guidelines, signature of adult family member, and signature of determining official.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-3 CENSUS CARDS:

85-023

This alphabetically arranged card series is used to compile a school census report used in determining future enrollment, and for referencing birthdates for those without birth certificates. Information in the file includes: name of family, occupation, and age and names of children.

RETENTION: Retain 2 years in office, then destroy.

STATE OF SOUTH DAKOTA
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PROGRAM: Administrative/Legal Services
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SCL-4 **CENSUS REPORTS (NAME SHEETS):**

85-023

This series is used to assist in planning for future needs of the school system by having information on the number of pre-schoolers in the school district and determining aid allocation. Information on the name sheets includes: name, code number, date of birth, and township. This series was filed with the commissioner of School and Public Lands prior to 1982, however, Senate Bill 27 repealed SDCL 13-22-4 on February 23, 1982 and any census now taken is voluntary.

RETENTION: Retain 2 years in office, then destroy.

SCL-5 **CONTRACTS FOR INTERSTATE GAMES OR MEETS:**

85-023

This series is used to document the contract for interstate athletic contests sanctioned by the National Federation of State High School Associations. Information on the contract includes: place, date, city, day, hour, sport, first team contest, preliminary game, financial terms, principal, manager, school, town or city, and state. A copy of the contract is filed with the South Dakota High School Activities Association in Pierre.

RETENTION: Retain 1 year in office, then destroy.

SCL-6 **CONTRACTS FOR INTRASTATE ATHLETIC GAMES OR CONTESTS:**

85-023

This series contains the official contracts used to set up intrastate athletic contests. Information includes: name of high schools, city, games, city, date, time, terms, consideration, date of signing, and signature of respective principals and faculty managers.

RETENTION: Retain 1 year in office, then destroy.

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SCL-7 **HANDBOOKS, ELEMENTARY/SECONDARY:**

85-023

This handbook series provides a source of reference to students of approved school board policy. Information in the handbook includes: announcements, book fines, rules of conduct, detention procedures, dress code, flag salute, grading, honor roll, and etc. This series is printed annually for distribution at the beginning of the school year.

RETENTION: Retain current in office. Destroy superseded or obsolete.

SCL-8 **MASTER ELIGIBILITY LISTS:**

85-023

This series provides the Executive Secretary of the South Dakota High School Activities Association with a list of students eligible to represent the high school in interscholastic athletics during the current school year. Information in the file includes: name, date of birth, date of enrollment, number of full and regular studies carried successfully, number of semesters attended, date of medical examination, and signature of school principal.

RETENTION: Retain 1 year in office, then destroy.

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SCL-9 **PERMANENT RECORD BOOKS (SDHSAA):**

85-023

This oversize book series documents the schools' activities in athletic competition throughout the school year. In the event of a protest this book would be presented as documentation of the event. The book is completed annually, and contains: name of contestants, date of birth, date of enrollment, number of semesters, date of enrollment, number of grades participating, sports engaged in, letters awarded, list of teams, results of boys and girls contests scores, team played, number of semesters of high school enrollment, list of contestants, athletic inventory, girls schedule, boys schedule, year, coach, captain, manager, notes on athletic season, track records, event, time or distance, name of holder, date, and signature of athletic director or school official responsible for compiling the record book.

RETENTION: Retain permanent in office.

(NOTE: Consider maintaining on microfilm when volume warrants).

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SCL-10 PERSONNEL FILES:

85-023

This series contains a folder for each employee in the school system. Information in the file may include, but is not limited to: application for employment, personal data sheet, personnel action notices, position description questionnaires, authorizations for payroll deductions, letters of reprimand and commendation, resume', service record, notice of resignation, W-4 forms, and supervisor's report of employee separation. The files serve as a history of the employee's service.

RETENTION: Retain current employee files in office. Transfer terminated employee files to storage for 2 years. Destroy 2 years after termination provided sufficient data on hours worked and compensation received has been maintained by the Department of Labor, Division of Retirement and Insurance.

(NOTE: Consider maintaining on updateable microfilm jackets instead of paper if volume warrants.)

SCL-11 SCHOOL BOARD POLICY BOOKS (OPERATIONS GUIDE):

85-023

This ring binder series serves to apprise all concerned of policies and standards set by the school board. Information in the book includes, but is not limited to: philosophy and purpose, powers and duties of board members, evaluation criteria, job description, organizational charts, fire policy, and negotiation procedures.

RETENTION: Retain current in office. Destroy superseded of obsolete.

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SCL-12 ANNUAL REPORT & STATE AID APPLICATION PART I:

85-023

This form series, (ECA-OSS-002), contains Part one of a two part report as provided in SDCL 13-8-47 and 13-13-37. The original is filed with the State of South Dakota, Division of Elementary and Secondary Education. The purpose of the report is to determine the amount of state aid that the school district is eligible for. Information in the report includes: number of one teacher elementary schools, number of two teacher elementary schools, number of junior high schools, number of senior high schools, number of four-year high schools, total number of schools for the district, tuition pupils educated within the district, tuition pupils educated outside the district, and other average daily membership. The form series is (ECA-OSS-002).

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-13 ANNUAL REPORT & STATE AID APPLICATION PART II:

85-023

This series contains a copy of Part two of a two-part report filed with the State of South Dakota, Division of Elementary and Secondary Education. The original is filed to comply with SDCL 13-8-47 and 13-13-37. Information on the report may include, but is not limited to: name and number of school district, county, signature of business manager, date, bus service costs, mileage paid, transportation receipts, board and room paid, number of alternative education programs in school district, number of certified substitute teachers and number of days used, number of non-certified substitute teachers and number of days used, and whether the Division of Elementary and Secondary Education had accredited the school for the current fiscal year.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-14 APPLICATION FOR VOCATIONAL PROGRAM:

85-023

This form series (ECA-VE-330) is used to certify compliance with the Vocational Education Act and Title VI of the Civil Rights Act of 1964, Title IX of the Education Amendments of 1972, and Section 504 of the Rehabilitation Act of 1973. The application is filed annually, and includes: school identification number, CIP code, name of program, personnel information, ethnic background of participants, personnel cost, amount approved, number of full time employees (FTE), and travel projections.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-15 APPLICATION FOR EMPLOYMENT, UNSUCCESSFUL:

85-023

This series may contain copies of resumes', credentials, and job application forms. Information includes: name of applicant, address, education, training, and experience. The file is maintained as a source of information when filling vacant positions within the school district when they occur.

RETENTION: Retain 6 months in office, then destroy.

(NOTE: Successful applications should be filed in the "Personnel File".)

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SCL-16 APPROVAL FORMS, VOCATIONAL EDUCATION:

85-023

This series is prepared by the State Division of Elementary and Secondary Education to inform school districts of the approved budget figures, and percentage of reimbursement to be received from the State. Information on the form includes: program number, school year, enrollment, school number, previous expenditures, present year approval, amount requested to date, balance, approval of FTE(S), and signatures of school official, state supervisor, and the state superintendent.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-17 ATHLETIC UNIFORM INVENTORY:

85-023

This series may include: name, pants, shirt, sweat pants, sweat jacket, and other equipment. The file is maintained for property management and accountability purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-18 AUDIT REPORTS:

85-023

This ring binder series contains both Department of Legislative Audit as well as federal audit reports concerning the expenditure and administration of School District funds. The reports are reviewed to identify problem areas and discrepancies so that corrective measures can be implemented. The auditing agency also maintains a copy of the audit reports.

RETENTION: Retain 3 years in office, then destroy.

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SCL-19 BALLOTS, ELECTION:

85-023

This series contains certified election ballots used in the election of school board members. The ballots list candidates and indicate voter preference.

RETENTION: Retain 60 days after election or recount, then destroy.

SCL-20 BANK STATEMENTS:

85-023

This series contains statements sent from the bank to the school district. Information on the statement includes: account name, account number, date, deposits, withdrawals, checks issued, service charge, and account totals. They are used for account reconciliation and audit purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-21 BANK WARRANT RECORDS:

85-023

This file contains records sent from individual banks used for reconciliation purposes. Information in the file may include: date, cancelled checks, deposit records, statements, and bank balance. They are used to reconcile checking accounts with bank balances, for reference or documentation, and for audit purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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PROGRAM: Fiscal/Personnel
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SCL-22 **BIDS, QUOTATIONS:**

85-023

This series is used to document the letting of informal bids, those amounting to less than \$3,500. Notification of bid letting is sent to a sampling of vendors who then submit their price and the school chooses. Information in the file includes: quantity, item, price, total, and closing date.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-23 **BIDS, SUCCESSFUL:**

85-023

This series is used to document bids let and received by the school district for goods and services rendered. Information in the file includes: notice of bid letting, contract terms, amount of contract, date, signature of parties, and instructions to publish. They are used to document proper procedure in the letting of bids, and are retained for audit purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-24 **BIDS, UNSUCCESSFUL:**

85-023

This series documents the receipt of unsuccessful bid applications by the school district. They are used for audit purposes and to demonstrate compliance with laws pertaining to the letting of bids. Information in the file includes: bidder, specifications, prices, and signatures.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-25 **BUDGET FILES:**

85-023

This file may contain: budget requests, operating budgets, and related working papers. The information is used for reference throughout the year in monitoring program activities, and when preparing future budget requests.

RETENTION: Retain 3 years in office, then destroy.

SCL-26 **BUDGET REQUESTS:**

85-023

This series is generated annually by the school district's teachers, then submitted to the Business Office Manager for review. Information in the file includes: price, itemization of school supplies, approved substitutes, and the total quantity.

RETENTION: Retain 2 years in office, then destroy.

SCL-27 **BUS REPORT:**

85-023

This documents the use of a vehicle as a bus and the reporting of the same to the Division of Elementary and Secondary Education (DESE) in Pierre. Information in the file includes: date, gas, oil, beginning mileage, ending mileage, activity, driver's signature, comments, and check number used for remitting expenses.

RETENTION: Retain 1 year in office, then destroy.

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SCL-28 CAPITAL OUTLAY CERTIFICATE:

85-023

This series documents the issuance of Capital Outlay Certificates for generation of revenue used in capital improvements. Information on the certificate includes: county, school district, amount, interest rate, principal, dates of redemption, and general terms of certificate. The file is arranged by receipt number.

RETENTION: Retain 5 years in office, after bond is cancelled or terminated, then destroy provided 1 year has passed since and independent post audit report has been received.

SCL-29 CASH DISBURSEMENTS JOURNAL:

85-023

This series may contain either computer printouts or manually entered journal books. The journal constitutes a summary of all warrants issued by the municipality. Information is arranged numerically by warrant number, and includes: amount, description, invoice, account, warrant number, warrant date, and vendor name.

RETENTION: Retain full book or computer reports 1 year in office after independent post audit report has been received, then transfer to permanent storage.

(NOTE: Consider microfilming after audited and keeping film permanent instead of paper.)

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SCL-30 CASH RECEIPTS JOURNAL:

85-023

This journal series, filed monthly by receipt number, is used to monitor total expenses and revenues, and the remaining balances in the budget. Information in the journal includes: received from, receipt number, amount, and coding for fund posting.

RETENTION: Retain full book 1 year in office after independent post audit report has been received, then transfer to permanent storage.

(NOTE: Consider microfilming after audited and keeping film permanent instead of paper.)

SCL-31 CASH SUMMARY, WEEKLY:

85-023

This series documents that cash received and cash deposited are deposited intact on a current basis. Information on the summary includes: total receipts issued since last deposit, total of those receipts issued, date, and debits and credits.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-32 CHAPTER I FINANCIAL STATUS REPORT:

85-023

This form series (ECA-OSS-001) is filed monthly to receive reimbursement under Chapter I guidelines. Information in the file includes, but is not limited to: budget number, budget period, date approved, reporting period, local educational agency, initial approval, amendments approved, totals, salaries, employee benefits, purchased services, supplies and materials, indirect costs, capital acquisitions, revenue received or requested, less total expenditures, funds of hand, current request, authorized representative, and date. They are a monthly financial cumulative status expenditure report and an annual project/completion report, and are kept for audit purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-33 CHECK REGISTER:

85-023

This series is arranged numerically by check number and includes: check number, to whom written, amount, and coding. It is used to balance check warrant records at month's end and for posting to the "General Ledger".

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-34 **CONCESSIONS TALLY SHEETS:**

85-023

This series provides for an accounting of proceeds from concession sales for posting to the "General Journal" and issuance of a receipt. Information on the form includes: school function, date held, beginning change and sales, total sales, concession sponsor, listing of money by denomination, long or short, receipt number, and signature of concession sponsor.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-35 **CONTRACTS:**

85-023

This file contains contracts (or copies of) and agreements between the school district and other parties. Information contained therein includes: terms and conditions of agreements, effective dates, costs, and funding sources. They are kept for reference and documentation purposes.

RETENTION: Retain originals current in office. Transfer terminated to storage for 7 years. Destroy 7 years after terminated.

SCL-36 **CONTRACT FILE:**

85-023

This file contains contracts (or copies of) and agreements between the school district and other parties. Information contained therein includes: terms and conditions of agreements, effective dates, costs, and funding sources. They are kept for reference and documentation purposes.

RETENTION: Retain originals current in office. Transfer terminated to storage for 7 years. Destroy 7 years after terminated.

Retain copies current in office, then destroy.

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SCL-37 CONTRACT, S.D. HIGH SCHOOL ACT. ASSN:

85-023

This series provides an original copy for the host school and a duplicate copy for the visiting school, of all contracts for a registered or certified official of the South Dakota High School Activities Association. Information in the file includes: name of official, address of official, name of school, athletic event to be officiated, date, time, consideration, date of signing, signature of Athletic Director or Administrator, and social security number of official to be employed.

RETENTION: Retain originals current in office. Transfer terminated to storage for 7 years. Destroy 7 years after terminated.

Retain copies current in office, then destroy.

SCL-38 CORRESPONDENCE:

85-023

This series may contain both copies of letters and memorandums sent, and originals of letters and memorandums received. The file is used for reference and documentation.

RETENTION: Retain 2 year in office, then destroy.

SCL-39 ELECTION RETURN RECORDS:

85-023

This series contains election returns documenting the election of school board officials. They are the original election return records and are kept here solely.

RETENTION: Retain 10 years in office, then transfer to the State Archives for permanent retention.

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SCL-40 EMPLOYEE CONTRIBUTION & WAGE REPORT:

85-023

This form series (DOL-UID-21) is used to report to the South Dakota Department of Labor, Unemployment Insurance Division, total wages paid in quarter. The file is arranged chronologically and includes: wages paid, wages in excess of \$7,000, taxable wages, signature, title, date, any changes in business, account number, name and address, social security number, number of employees working, and due date.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-41 EMPLOYEE EARNINGS REGISTER:

85-023

This computer printout series is generated to reconcile with "Bank Warrant Records". It is arranged alphabetically by employee name then numerically by check number and is generated monthly. Information in the file includes: date, amount, Federal withholdings, insurance, savings, retirement, employee name, quarterly earnings, and year-to-date totals.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-42 ENROLLMENT & STUDENT RECORD DATA REPORT:

85-023

The annual Education Data System Enrollment and Student Record Report documents enrollment qualifications for funding by the Division of Elementary and Secondary Education. The file includes: name of school, name of program, school code number, OE program code number, school telephone number, name of instructor completing this form, number of contact hours required for student to complete program, date of first enrollment, program level, special needs, and completion information.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-43 EXPENDITURE APPROVALS OF TITLE I:

85-023

This series provides documentation of Title I appropriations, and guidelines for the appropriate disposal of these funds. The approval is granted annually, and includes: school assigned to, name of staff member, number of full time employees (FTE), rate of pay, salaries, benefits, services, capital outlay, and indirect costs. The authorized representative of the Title I program in the school district also maintains a duplicate copy.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-44 FIRST REPORT OF INJURY:

85-023

This legal size form series fulfills Workmen's Compensation and Occupational Safety and Health Administration (OSHA) requirements for filing reports of occupational injuries and illnesses. Information in the report includes: background information on employer and employee, occupational injury or illness information, and medical care required. The information is duplicated in the South Dakota Department of Labor, Division of Labor and Management and the South Dakota Department of Health. Federal law mandates that this record be kept for five years.

RETENTION: Retain 5 years in office, then destroy.

SCL-45 FOOD SERVICE CHECK OFF SHEET:

85-023

This series provides a monthly record of meals eaten by each pupil. The file is segregated by classroom, and arranged alphabetically by pupil name. Information in the file includes: identification number, name, total meals, date, meal taken, and whether meal was free or reduced in price. The information is summarized in the "Food Service Statement".

RETENTION: Retain 1 year in office, then destroy.

SCL-46 FOOD SERVICE STATEMENT:

85-023

This computer printout series provides a billing statement at month's end for food service provided to each student. The file is arranged alphabetically and includes: name, address, month, number of meals, past due amount, credit, total due, and rate of interest (if any).

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-47 FUND TRANSFERS, COUNTY AUDITOR:

85-023

This legal size form series, (13-6-18), documents allocation of funds deposited by the County Auditor for expenditure by the school district. The file is arranged chronologically by month, and includes: code number, source, total, general fund, capitol outlay fund, bond redemption fund, revenue from local sources, revenue from county, revenue from state, and revenue from federal sources.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-48 GATE TALLY SHEETS (ADMISSION TICKETS):

85-023

This series documents ticket sales and serves as a report to the Business Office itemizing the number of tickets sold and amount of money received. Information on the sheet includes: school function, date held, ticket seller, beginning change, type of ticket, value of ticket, beginning ticket number, ending ticket number, and signature of ticket seller.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-49 GENERAL JOURNAL:

85-023

This oversize journal series constitutes a General Journal with individual entries posted from both cash receipts and check disbursements. Information is arranged chronologically by date of entry, and includes: year, title of account, debit, credit, opening entries, and balance at the end of each month.

RETENTION: Retain full book 1 year in office after independent post audit report has been received, then transfer to permanent storage.

(NOTE: Consider microfilming after audited and keeping film permanent instead of paper).

SCL-50 GENERAL LEDGER:

85-023

This file may contain either computer printouts or standard ledger sheets/books. The general ledger summarizes and controls all detailed records and transactions. Information in the ledger may include, but is not limited to: account number, account name, debit and credit balances, fund, sub-fund, receipt amounts, transfer amounts, refund amounts, and totals. They are used for fund accountability, reconciliation with other accounting reports, and audit purposes.

RETENTION: Retain computer report or full book/sheet 1 year in office after independent post audit report has been received, then transfer to permanent storage.

(NOTE: Consider microfilming after audited and keeping film permanent instead of paper).

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SCL-51 **INVENTORY CAPITAL ASSETS:**

85-023

This series may include: a copy of the annual inventory printouts, file maintenance forms which will reflect changes in the inventory, an inventory procedures manual, and surplus property received and transferred forms. The file is maintained for property management and accountability purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-52 **LEAVE LIABILITY REPORT:**

85-023

This series documents sick leave earned, taken, and remaining by employees of the school district. Information in the file includes: payable sick leave, accumulated sick leave, accumulated leave, date of entry, days absent, additional leave, and personal leave. It is used to determine the school district's liability in the area of sick and annual leave.

RETENTION: Retain current in office. Destroy superseded or obsolete.

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SCL-53 LEAVE REQUESTS:

85-023

This series contains the form used in requesting leave on behalf of employees needing time off for personal vacation, jury duty, death or illness in family, or sickness. The forms contain: employee's name, date(s) of requested leave, total hours requested, type of leave requested, and signatures of the employee and approving supervisor. They are used to insure adherence to contract terms.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-54 LEDGER CARDS:

85-023

This card series is used to record expenses, revenues and budget balances. The entries are posted from cash receipts and warrants issued. The file is arranged by fund type, and includes: debit, credit, budget balance, fund, function code, and object code.

RETENTION: Retain full cards 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-55 MINUTES, ATHLETIC CONFERENCE:

85-023

This series contains copies of Athletic Conference Meeting Minutes filed here as documentation of payment of conference dues. It also serves as reference to the general public. Original minutes are maintained by the originating body.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-56 **MINUTES, SCHOOL BOARD:**

85-023

This series contains original minutes from school board meetings and are maintained here as a public record. They are bound in hard cover as they accumulate.

RETENTION: Retain permanently in office.

(NOTE: Consider maintaining on microfilm when volume warrants.)

SCL-57 **NOMINATING PETITIONS:**

85-023

This series contains petitions used to nominate candidates for membership on the school board. Information on the petitions include: name of candidate seeking office, name of person signing petition, address of petition signer, and date of signing.

RETENTION: Retain 1 year in office, then destroy.

SCL-58 **OLD AGE SURVIVORS INSURANCE (OASI), REPORT TO:**

85-023

This three part form series is maintained to document information forwarded to OASI in Pierre concerning total wages paid and total contributions for both employee and employer. Information on the form includes: reporting period, identification number, school name, total covered wages, employees and employers contribution, and total remittance. This form series provides for monthly reporting and a quarterly summation.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-59 PAST DUE ACCOUNTS, SCHOOL LUNCH:

85-023

This computer printout series is used in generating dunning letters to parents of pupils with past due balances on their school lunch account. The file is arranged alphabetically by pupil name, and includes: code number, pupil name, parent name, amount owed, and date of billing. This information is obtained from the "Food Service Statement" and is compiled monthly.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-60 PAYROLL AUTHORIZATION:

85-023

This computer printout series is used to record the rate of pay and any supplemental pay received. The series, generated monthly and arranged alphabetically, includes: name, employee identification number, department, rate, hours, unit, overtime, holiday, vacation, sick pay, and permitted deductions.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-61 **PAYROLL CORRECTION DATA:**

85-023

This computer printout series or journal log is used to supplement the payroll authorization data to account for coaching, unused sick leave, and other special activities. The file is arranged numerically by check number, printed monthly, and includes: check number, employee name, employee number, gross, Federal Income Tax, state tax, deductions, FICA, and net.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-62 **PAYROLL LEDGERS:**

85-023

This computer printout series is generated to record issuance of checks for employee payroll. The file is arranged alphabetically by department and includes: name, address, state excise tax, federal tax, date of pay, salary, employee number, department, social security number, retirement, hospital insurance, cancer insurance, and check number. This information is obtained from the "Time Cards".

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-63 **PAYROLL REGISTER:**

85-023

This series may contain either a computer printout or standard ledger sheets. It is generated to record payroll and payroll deductions made monthly by the school district. The file is arranged by department and contains: employee, social security number, check number, amount, withholdings, retirement, insurance, total, fund, and account. Information is obtained from "Time Cards/Sheets", and summarized in the "Cash Disbursements Journal".

RETENTION: Retain computer report of full book/sheet 1 year in office after an independent post audit report has been received, then transfer to permanent storage.

(NOTE: Consider microfilming after audited and keeping film permanent instead of paper.)

SCL-64 **PERFORMANCE APPRAISALS:**

85-023

This series contains performance appraisal forms showing a statement of standards and responsibilities for each employee, and the immediate supervisor's evaluation of the employee's performance. Performance appraisals are used for justifying merit increases in salary, for commending deserving employees, and as documentation supporting the dismissal of career service employees for unsatisfactory job performance.

RETENTION: Retain 3 years in office, then destroy by shredding provided no grievance is pending.

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SCL-65 PERSONNEL FILES:

85-023

This series contains a folder for each employee in the school district. Information in the file may include, but is not limited to: application for employment, personal data sheet, personnel action notices, position description questionnaires, authorizations for payroll deductions, letters of reprimand and commendation, resume', service record, notice of resignation, W-4 forms, transcript, teacher's certificate, and supervisor's report of employee separation. The files serve as a history of the employee's service.

RETENTION: Retain current employee files in office. Transfer terminated employee files to storage for 2 years. Destroy 2 year after termination provided sufficient data on hours worked and compensation received has been maintained by the Department of Labor, Division of Retirement and Insurance.

SCL-66 PURCHASE ORDERS:

85-023

This form series, arranged numerically by purchase order number, documents the approval of items for purchase by the business office. Information in the file includes: purchase order number, shipping address, date, coding, quantity, number ordered, number received, stock number, description, price, total amount, and date of "Purchase Order Request".

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-67 **RECEIPTS:**

85-023

This series is issued in duplicate with the original going to the payer and the duplicate being retained by the school district for reference. Both the original and duplicate copies of receipts which are voided should be retained. The receipt provides proof of payment for the payer and a means of accountability for money received by the school district. Receipts should be prenumbered and include: date, receipt number, name of school district, city or town, received from, amount, description, fund name credited to, and received by signature. The nature of some receipts will require supporting documents be maintained by the school district. Examples of such receipts are food service sales and admissions to school functions.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-68 **REGISTERED WARRANT REGISTER:**

85-023

This series records checks which are not paid for want of funds. Information on the register includes: number, date, and amount of each warrant, fund upon which the same is drawn, date of presentation, name and address of the person in whose name the the same is registered, date of payment when made, amount of interest and the total amount paid thereon, date when notice to the person in whose name such warrant is registered is mailed. This series serves as a control record on the warrants from the time they are registered until they are paid.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-69 REIMBURSEMENT CLAIMS FILE:

85-023

This series documents the application to the state for meals served to subsidized students. The file is arranged chronologically by month, and includes: warrant number, date, payee, control number, gross, discount, net amount, billing to other agencies who you provide food for, operating statement, and a listing of which meals were taken. They are prepared from invoices and applications for free and reduced meals.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-70 REQUISITIONS:

85-023

This series initiates the "Purchase Orders" if the request is deemed appropriate. Information on the form includes: request date, department or class, coding, approved by, address, quantity, itemized description, unit price, total, employee's signature, and date.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-71 RETIREMENT CONTRIBUTION REPORTS, MONTHLY:

85-023

This series may be either a computer printout or standard form. They are used to document employee and employer contributions to the retirement system. Information is used to document proper contributions, and may include: employer name, employee name, billing date, current report totals, employer matching totals, outstanding balance, delinquency payments, total, and authorized signatures. Each report supersedes the previous one.

RETENTION: Retain current in office. Destroy superseded or obsolete.

SCL-72 RETIREMENT AND PENSION FILES:

85-023

This series contains information concerning pension and retirement benefits. Information in the file may include, but is not limited to: employee name, years of service, employer contributions, employee contributions, and benefits to be received.

RETENTION: Retain 90 years in office unless copied in the Department of Labor, Division of Retirement and Insurance.

(NOTE: Consider maintaining on microfilm instead of paper when volume warrants.)

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SCL-73 REVENUE REPORT:

85-023

Information in this series is compiled from ledgers, and is prepared by the finance officer to monitor revenue and report to the school board. The file is prepared monthly and includes: revenue for month, total revenue year to date, actual versus budgeted, allocation by fund, capitol outlay, received this month, received to date, and balance.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-74 TIME AND WORK RECORDS, DAILY:

85-023

This series contains detailed daily work records by school district employees. Information may include: date, hours of arrival and departure, department, employee name, signature of employee, and signature of supervisor. The information is summarized in both the "Payroll Register", and the "Time Cards/Sheets".

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-75 **TIME CARD/SHEETS:**

85-023

This file contains copies of completed time cards/sheets as submitted by school district employees. They contain: social security number, pay period ending date, days worked, days off, hours worked, hours off, total hours for the period, and signatures of employee and supervisor. They initiate the payroll authorization process and are kept for audit purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-76 **TUITION ASSIGNMENT REQUESTS:**

85-023

This series documents the application and approval for tuition assignment by the school board for students who wish to attend a district they do not reside in. The request is filed annually, and includes: name of student, age of student, grade of student, requested out-of-district school district, miles to school of attendance, and parent's or guardian's signature.

RETENTION: Retain 1 year in office, then destroy.

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SCL-77 TUITION, OFFICIAL ASSIGNMENT OF (138-20):

85-023

This series documents the assigning of tuition between assignor and assignee and the terms of that agreement. The original is retained by the assignor district, and a copy returned to the assignee district. The assignment is filed annually and contains: child's name, parent or guardian, address, age, grade, assignor school district, assignee school district, and signatures of superintendent or clerk of each school district.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-78 UNCLAIMED WAGE RECORDS:

85-023

This series contains wage records that document the issuance of a warrant that was never cashed. They may be credited back to cash and this provides the documentation to support such a transfer.

RETENTION: Retain 6 years in office, then destroy provided 1 year has passed since an independent post audit report has been received.

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SCL-79 UNEMPLOYMENT INSURANCE REPORTS:

85-023

This series is maintained to document total wages paid to school district employees during the quarter. The reports are arranged chronologically by reporting date, and include: account number, name, address, date quarter ended, wages paid, wages in excess, taxable items, and number of employees. The State Department of Labor, Unemployment Insurance Division maintains the original report. Information is compiled from the "Payroll Ledger".

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-80 VOUCHERS:

85-023

This series may contain copies of travel, non-cash, direct, receiving, and journal vouchers. Each voucher includes: the reason for which the money was expended, the amount, the fund expended from, date, who the funds went to or what account they were transferred to, and the authorized signatures. They are used for reference to determine quantities and descriptions of supplies and services ordered, for vendor information, and audit purposes.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-81 **VOUCHERS, TUITION CLAIM:**

85-023

This series is used to bill students attending school but not residing in the school district. Information on the voucher includes: school fiscal year, date, to, from, address, name of pupil, name and address of parent or guardian, pupil's school district number, length of school term in days, number of days pupil was member, dates during which pupil was member, grade in which enrolled, rate of tuition per day, total amount of tuition due for period, and signature of clerk or business manager of school district submitting claim for payment.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-82 **WAGE AND TAX STATEMENTS (W-2 FORM):**

85-023

This form is generated annually and contains: name, social security number, number of exemptions, federal tax withheld, FICA tax withheld, total wages earned, state tax withheld, employer identification number, and employer's name and address. The original is retained by the employer and two duplicates are mailed to the employee.

RETENTION: Retain 5 years in storage, then destroy.

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SCL-83 WAGE GARNISHMENTS:

85-023

This series contains the legal instruments from the courts used to support the wage garnishment of an employee of the school district. Garnishment of debts and property is provided for under SDCL 21-18.

RETENTION: Retain in office through satisfaction of garnishment, then transfer to storage for 5 years. Destroy 5 years after satisfied provided 1 year has passed since an independent post audit report has been received.

SCL-84 WAGES PAID (BY REPORTING ENTITY), STATE REPORT OF:

85-023

This form series (OMB No. 0960-0043) is submitted by the school district to the Old Age and Survivors Insurance Program who in turn reports to the Department of Health and Human Services, Social Security Administration. The report is filed annually and includes: identification number, name and address of school, reporting period, number of employees, social security number, name of employees, covered wages paid, total wages, contributions, and the total deposits remitted to state agency for reporting period.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-85 WITHHELD FEDERAL INCOME TAX, QUARTERLY RETURN OF: **85-023**

This form series (914 E) is used to report total earnings and withholdings to the Internal Revenue Service Center in Ogden, Utah. Information on the report includes: employer identification number, calendar quarter of return, tax liability, total wages, income tax withheld, adjusted total of income tax withheld, net tax, signature of business manager, and the date.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-86 WITHHOLDING ALLOWANCE CERT. EMPLOYEE'S (W-4 FORM): **85-023**

This form series is submitted by every employee in the municipality. They inform the employer of how much money to withhold according to his tax liability. Information on the form includes: name, social security number, marital status, address, allowances, exemptions, employee's signature, employer's name and address, and employer identification number. The W-4 remains in effect until employee changes it or if you claimed yourself "exempt", until February 15 of next year.

RETENTION: Retain current in office. Destroy superseded or obsolete.

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SCL-87 ACADEMIC PROGRESS REPORTS:

85-023

This series documents and monitors a student's academic progress through elementary and secondary school. The teacher compiles the information which includes: student's name, class, subject, date, teacher, counselor, current status, ability, attitude, performance, recommendations, and additional comments.

RETENTION: Retain 5 years in office after graduation or student leaves school system, then destroy.

(NOTE: Consider maintaining on microfilm for security and space savings).

SCL-88 ACCIDENT REPORTS:

85-023

This series documents the reporting of all accidents within the twenty-four (24) hours allotted by administrative rules. Information in the report includes: name of person injured, date of accident, exact time of accident, place accident occurred, nature of accident, activity engaged in, teacher/sponsor of activity, disposition of student, person filing report, date of filing report, and comments.

RETENTION: Retain 3 years in office, after case closed, then destroy.

SCL-89 ANNUAL REPORTS, S.D. HIGH SCHOOL ACTIVITIES ASSN.:

85-023

This report series is filed annually with the South Dakota High School Activities Association. It is used to compile state-wide statistics of levels of participation. Information in the report includes: name, semesters, activity, and number of students.

RETENTION: Retain 6 year in office, then destroy.

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SCL-90 **ATTENDANCE CALENDARS:**

85-023

This series is used to record conferences with parents, times tardy, and comments concerning attendance. Information in the file includes: name, date, student identification number, and whether absence was excused or unexcused.

RETENTION: Retain 6 months after end of school year, then destroy.

SCL-91 **CLASS TEST RECORD SHEET:**

85-023

This series is maintained to provide the Board of Education with test scores used to determine curriculum strengths and weaknesses. Information in the file includes: students name, test scores, date tested, percentile rank, and name of test. The information is duplicated in the standard test record.

RETENTION: Retain 1 year in office, then destroy.

SCL-92 **CONSENTS, MEDICAL TREATMENT:**

85-023

This series documents the consent of parent/guardian, and child for emergency medical services that may be required while the child is under the supervision of an employee of the school district. The consent form is filed annually and includes: school district, name of student, date of signing, and signatures of parent/guardian and child.

RETENTION: Retain 1 year in office, then destroy.

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SCL-93 ENROLLMENT CARDS:

85-023

This card series documents the enrollment of a student in grade school. Information on the card includes: name, date of birth, sex, parents or guardian, phone, address, occupation, date of entrance, family physician, district number, grade, year, teacher, and date of withdrawal. The file is arranged alphabetically by student name, and segregated by grade.

RETENTION: Retain 1 year in office, then destroy.

SCL-94 EVALUATIONS, TEACHER:

85-023

This series is compiled by principals for school board review. Information on the form may include, but is not limited to: name, date, grade, subject, extra duty, personal characteristics, instructional effectiveness, professional characteristics, comments, classroom visits, signature of evaluator and teacher, and teacher reactions to evaluation. These evaluations are used to make recommendations to the school board regarding the prospect of reemployment and any stipulations that may be contingent upon reemployment.

RETENTION: Retain 1 year in office, then transfer to storage for 4 years. Destroy after 5 years provided no litigation concerning employment terms is pending.

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SCL-95 **HEALTH RECORD:**

85-023

This series serves to chronicle the health record of the student. It is arranged alphabetically by student name, and includes: history of illness, emergency telephone number, physician, name of school attended, certificate of immunization, sex, birthplace, birthdate, parent or guardian, and address. Entries are made primarily while pupil is in the elementary grades but is retained in students file through his senior year.

RETENTION: Retain in office until student completes his final year of school, then destroy.

SCL-96 **KINDERGARTEN SCREENING REPORT:**

85-023

This series is used to note developmental stages of kindergarten students and may be used for early detection of learning or physical disabilities. Categories evaluated include: physical, emotional, social, intellectual, and speech. The evaluations are performed by the kindergarten instructor.

RETENTION: Retain 5 years in office, then destroy.

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SCL-97 PERMANENT RECORD CARD:

85-023

This permanent record card is used to reference previous academic achievements and provide a complete record of grades attained and days present. Information in the file includes: students name, date of birth, name of school previously attended, parents name, phone, doctor, siblings, date of graduation, teacher, year, grade, classes, and attendance record.

RETENTION: Retain permanent in office.

(NOTE: Consider maintaining on microfilm when volume warrants.

SCL-98 PHYSICAL EXAMINATIONS (SDHSAA):

85-023

This yellow copy series documents parent permission for participation in organized high school athletics, any history of injury, illness, or disease, the taking of medication, and certification of physical fitness by a physician. Information on the form includes: pupil name, year in school, city, date of birth, high school, medical history, date, signature of parent or legal guardian, and signature of physician.

RETENTION: Retain 1 year in office, then destroy.

SCL-99 PSYCHOLOGICAL FILE:

85-023

This confidential file series is used to provide a basis for academic placement. Information in the file includes: name, date of birth, referred by, examined by, assessment procedures, summary of findings, and signature of psychologist.

RETENTION: Retain 5 years in office, then destroy.

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SCL-100 READING PROGRESS CARD:

85-023

This series documents a students' reading progress. Information in the file includes: level of instruction, master test scores, list of specific skills needing development, and recommendations for further instruction. Tests are given annually and recorded at that same time.

RETENTION: Retain in office through students' last year in school, then destroy.

SCL-101 RELEASE REQUESTS:

85-023

This series is required by the Family Educational Rights and Privacy Act of 1975 (PL 93-3580) whereas a reasonable effort must be made to notify the parent or eligible student of the exchange of school information. Information in the request includes: student's name, date of birth, grade, records requested by, records requested from, address, specific records to be disclosed, purpose of disclosure, date, and signature of parent/guardian or individual.

RETENTION: Retain 1 year in office, then destroy.

SCL-102 REPORT CARDS:

85-023

This series is used to report academic status of students to parents. Information on the card includes: name, year, grade, subject, grades, attendance record, and principal's signature.

RETENTION: Retain 1 year in office, then destroy.

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SCL-103 **STANDARD TEST SCORES:**

85-023

This series documents achievement levels in relation to grade level in school. They are administered throughout the elementary and secondary grades.

RETENTION: Retain in office through the students' last year in school, then destroy.

SCL-104 **TEACHER RECORDS:**

85-023

This series serves as a report of attendance and classification of work performed. The records were generated annually and were filed with the County Superintendent. Information in the series includes: age, sex, dates present and absent, grade attended, subjects, and whether promoted or retained. This series was discontinued in the 1940's.

RETENTION: Retain permanent in office if this is the only permanent student record.

Retain 1 year in office, then destroy if this series is used only as a teacher grade book.

(NOTE: Consider maintaining on microfilm when volume warrants.

SCL-105 **TRANSFER OF RECORD FILE:**

85-023

This form series documents the transfer of school records to or from the school district in the event a student moves to another school district. Information in the transfer includes: name, grade, parent's name, transferred from, transferred to, subjects, grade, and textbooks used.

RETENTION: Retain 1 year in office, then destroy.

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SCL-106 WRESTLING WEIGHT PERMITS (SDHSAA):

85-023

This form series documents students' weight to prevent undue weight reduction for competitive purposes; reductions which might jeopardize the physical well-being of the pupil. Information on the permit includes: pupil name, high school, date of birth, height, weight, actual weight when reported for practice, physician's recommended minimum weight, date examined, signature of physician, parent's permission, pound minimum, date, and signature of parent.

RETENTION: Retain 1 year in office, then destroy.

STATE OF SOUTH DAKOTA
 RECORDS RETENTION &
 DESTRUCTION SCHEDULE
 AUTHORIZATION FORM
 (Std Form RM-1 Rev 1/03)

DEPARTMENT: State of South Dakota
 DIVISION: Political Sub-Divisions
 OFFICE: Local Schools
 PROGRAM: Special Services
 RECORDS OFFICER: Superintendent
 RM CUSTOMER #: _____

		R.D.B.
RECORD		AUTHORITY
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SCL-107 APPLICATIONS, EDUCATION CONSOLIDATION IMPROVEMENT ACT:

85-023

This series contains the applications for funding through the Division of Elementary and Secondary Education (DESE), in Pierre. The applications include a reporting of program objectives, and contain: enrollment figures, per pupil allocation, special education allotment, budgeted expenditures for the year, and an expenditure evaluation. Applications may be filed annually or every third year depending on the length of the previous authorization.

RETENTION: Retain 3 years in office, then transfer to storage for 2 years. Destroy after 5 years provided 1 year has passed since an independent post audit report has been received.

SCL-108 EDUCATION CONSOLIDATION IMPROVEMENT ACT FILES:

85-023

This series, established under Public Law 97-35, contains the application for grants to meet the special educational needs of educationally deprived children. Information on the grant includes, but is not limited to: legal name of agency, address, signature of authorized representative, project summary, statement of assurances, target school, supporting data, method of determining eligible schools, needs assessment, project participants, budget, staff information, and non-public school information.

RETENTION: Retain 5 years in office, then destroy provided 1 year has passed since an independent post audit report has been received.

STATE OF SOUTH DAKOTA
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 RECORDS OFFICER: Superintendent
 RM CUSTOMER #: _____

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SCL-109 INDIVIDUAL EDUCATION PROGRAM (IEP), FILES:

85-023

This series documents the drafting of an Individual Educational Program for a student determined to be educationally deprived. Information in the file includes: student name, date of birth, date of program entry, present levels of performance, prioritized long-term goals, short term objectives, placement recommendation, beginning/ending date, minutes per day, time in regular classroom, review date, committee members present, date of meeting, and parent's signature and date.

RETENTION: Retain 5 years in office, then destroy.

SCL-110 INDIVIDUAL EDUCATION PROGRAM REVIEWS:

85-023

This series documents the notification of parents of scheduled meeting date to review the Individual Education Program of their child. Information in the file includes: name of student, parent or guardian, type of evaluation, principal's signature, and signature of instructor or therapist.

RETENTION: Retain 5 years in office, then destroy.

SCL-111 PARENT PERMISSION FOR STUDENT EVALUATION FORMS:

85-023

This series documents the receipt of approval prior to testing or evaluation by any school staff. This prior approval is in compliance with federal regulations. Information on the forms include: date, name of student, date of birth, school, reason for evaluation, person requesting evaluation, name and position of person(s) conducting the testing or evaluation, type of evaluation, permission granted or denied, and signature or parent or guardian.

RETENTION: Retain 5 years in office, then destroy.

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PROGRAM: Special Services
RECORDS OFFICER: Superintendent
RM CUSTOMER #: _____

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SCL-112 PARENTS PERMISSION, TEMPORARY PLACEMENT (IEP):

85-023

This series documents the request of the school system for temporary placement of a student deemed to be in need of special education services. The request is sent to the parents requesting parental approval and their signature. Information on the form includes: date, name of child, staff member making recommendation, school phone number, signature of parent or guardian, and parents address or phone number.

RETENTION: Retain 1 year in office after dismissal form program, then transfer to storage for 4 years. Destroy after 5 years.

SCL-113 PROJECT COMPLETION REPORTS:

85-023

This report is filed annually with the Division of Elementary and Secondary Education/ Education Consolidation Improvement Act, (ECIA) Chapter 1 and 2 Offices. Information on the report includes: salaries, employee benefits, supplies, acquisitions, totals, date funds received and disbursed, on hand outstanding obligations, returned to state, and authorized signatures.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-114 REFERRAL FORMS:

85-023

This series documents the referral of a student by a teacher for special consideration by the placement committee. Included on the form are areas of special concern and a listing of observed problem areas. The form is signed by the teacher making the referral and submitted to the principal or Special Services Director.

RETENTION: Retain 5 years in office, then destroy.

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 PROGRAM: Special Services
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SCL-115 RELEASE FORMS OF SPECIAL EDUCATION:

85-023

This series documents the release from Special Education and appraisal of all parties involved. Information on the form includes: student's name, date, birthdate, goals met, recommendations, approval of parent and signature, and a provision approving destruction of all previous tests and Individual Educational Programs one year after dismissal.

RETENTION: Retain 5 years in office, then destroy.

SCL-116 REQUESTS FOR SPECIAL ASSESSMENTS:

85-023

This series documents the request by special education personnel to initiate testing by a psychologist. Information in the file includes: student's name, grade, parent, address, date of birth, teacher, phone, reason for referral, referral expectations, assessments requested, financial responsibility, and superintendent's or designee's signature.

RETENTION: Retain 1 year after graduation in office, then destroy.

SCL-117 SPECIAL EDUCATION ENROLLMENT FORMS:

85-023

This series documents the enrollment of children in the Special Education Program, and copies are submitted annually to the Division of Elementary and Secondary Education, Special Education Program for their reference. Information on the form includes: date, identification number, name, district, duplicate, category, date of birth, age, certification date, entry date, and social security numbers of the staff.

RETENTION: Retain 5 years in office, then destroy.

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SCL-118 STAFFING REPORTS:

85-023

This series documents the evaluation of students for possible placement, continued placement, or other action. Information on the form includes: student's name, grade, teacher, parent or guardian, members present, team findings, recommendations, responsibilities, date to be reviewed, signature of staff member completing report, and parent or guardian signature.

RETENTION: Retain 5 years in office after dismissal from program, then destroy.

SCL-119 STATEMENT OF PARENT RIGHTS:

85-023

This series documents the notification of parents with children receiving special services of their rights and the procedures concerning placement. The statement is signed by the parent or guardian and dated.

RETENTION: Retain current in office. Destroy superseded or obsolete.

SCL-120 TEST FILE, DIAGNOSTIC OR ACHIEVEMENT:

85-023

This series is used to maintain results of diagnostic or achievement tests completed by the student and used to monitor progress and determine the need for special services. The file contains: name of student, test name, score received, date of test, and percentile ranking.

RETENTION: Retain 5 year in office after dismissal from program, then destroy.

STATE OF SOUTH DAKOTA
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DEPARTMENT: State of South Dakota
DIVISION: Political Sub-Divisions
OFFICE: Local Schools
PROGRAM: Vocational Education
RECORDS OFFICER: Superintendent
RM CUSTOMER #: _____

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SCL-121 REIMBURSEMENT FOR EQUIPMENT FORM:

85-023

This series is submitted in duplicate to the Department of Education and Cultural Affairs, Division of Vocational Education in Pierre to receive reimbursement annually for equipment purchases consistent with the Vocational Education Act and in compliance with provisions set forth in the South Dakota State Plan for Vocational Education. Information on the form includes: school name, code, program name, school number, city, secondary or post-secondary, quantity, description, date of payment, school warrant number, unit price, trade in allowance, amount of claim, total, and signature of designated school official.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-122 REIMBURSEMENT FOR SALARIES FORM:

85-023

This series documents the request for reimbursement of teacher's salaries involved in vocational education. Information on the form includes: school number, code, program name, school name, city, period covered, instructor's name, total vocational personnel costs, regular activities, special services, total, gross salary, school share, total salary, percent of time spent on vocational program, total vocational salary reimbursement request, date, and claimant signature.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

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SCL-123 REIMBURSEMENT FOR SUPPLIES FORM:

85-023

This series documents the application for reimbursement of supplies purchased for the vocational education program. Information on the form includes: school number, code, program name, school name, city, secondary or post-secondary, payee, general description, date of payment, school warrant number, amount of claim, total, date, and signature.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.

SCL-124 REIMBURSEMENT FOR TRAVEL FORM:

85-023

This series documents the application for reimbursement of travel related to the vocational education program. Information on the form includes: school number, code, program name, school name, city, secondary or post-secondary, payee, purpose and place, date of payment, school warrant number, amount of claim, total, date, and signature of designated school official.

RETENTION: Retain 1 year in office, then transfer to storage for 3 years. Destroy after 4 years provided 1 year has passed since an independent post audit report has been received.