

RETENTION OF DISTRICT RECORDS

Board Policy

In compliance with Section 33-506, Idaho Code, the Board of Trustees of Shelley Joint School District No. 60 establishes the following guidelines to provide administrative direction pertaining to the retention and/or disposal of district records.

Suggested Implementation Guidelines

1. Records to be retained permanently:
 - a) Official board minutes in official minute book, including attachments
 - b) Title, Deeds, or Certificates, Easements, Water Rights to district property
 - c) Court orders and related pleadings
 - d) Ledger of receipts and expenditures
 - e) Audited copies of official state department reports, official audit reports
 - f) Certificated personnel folders, registry of teacher certifications, teacher contracts
 - g) Inventories of district property as taken every calendar year divisible by five
 - h) Annual attendance summaries by building
 - i) School certification reports
 - j) Master Pupil Personnel Records (Student Records)
 - k) Adopted reports to Board
 - l) Annual reports to Board
 - m) Audited Financial Statements
 - n) Adopted School Budgets
 - o) Personnel and payroll records
 - p) Bond Documents
 - q) Construction documents and drawings
 - r) Legal documents
 - s) Accident reports/claims

2. Records to be retained three (3) years:
 - a) Bills and receipts
 - b) Paid tax anticipation notes
 - c) Levy certificates
 - d) Auditor's remittance reports
 - e) Correspondence
 - f) Copies of state and federal reports
 - g) Enrollment attendance data
 - h) U.S.D.A. (3 years from submission of final expenditure)

3. Records to be retained for five (5) or more years:
 - a) Bank statements
 - b) Canceled checks, warrants, paid claims, and vouchers

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- c) Title I Records, or until all pending audits or reviews are completed
 - d) Chapter 2, or until all pending audits or reviews are completed
 - e) Title VI-B, or until all pending audits or reviews are completed
4. Records to be retained for seven (7) or more years:
- a) Payroll registers
 - b) Invoices from vendors
 - c) Bond certificates (cancelled)
5. Records to be retained for other time periods:
- a) Cancelled bonds and coupons – one (1) year following repayment in full of entire bond issue
 - b) Listing of official bids in the Board minutes – one (1) year
 - c) Ballots and oaths of election – until canvassed and recorded in the minutes, (not less than eight months following election)
 - d) Ballots for bond elections
 - Not less than 60 days after bonds have been delivered to purchaser
 - Not less than eight months following bond election
 - e) Expired liability/property insurance policies – eight (8) years
 - f) Expired workman’s compensation insurance policies – ten (10) years

In the event that district records do not correspond to any of the above listed categories, the Superintendent will determine the period of retention for a particular record.

Methods of Destroying Official Records

The district’s official records, and any copy thereof that may be deemed to be confidential and/or not intended to be disseminated to the public, will be shredded before being disposed.

Legal References

Idaho Code Sections

33-701(8)

33-407

33-508

SDE Administrator’s Handbook

1.43

Federal Regulation