Local Records Retention Schedules

Missouri Revised Statutes Chapter 109 (Public and Business Records) Section 255 authorizes the Local Records Board to establish minimum retention periods for the administrative, fiscal and legal records created by local governments.

Retention and disposition of records that are common to many offices are included in the General Schedule. Records unique to particular offices are addressed in individual office schedules.

Public School Records Retention Schedule

See also the General Records Retention Schedule.

Using this Records Retention Schedule

Every day local government offices throughout Missouri produce records that document the rights of citizens, the actions of the government that serves them and the history of the community in which they live. It is the responsibility of local government to effectively maintain and manage these records and to ensure the continued preservation of those records of essential evidence that have enduring and permanent value. The introduction to this retention schedule provides local government officials with basic information on records and the application of retention schedules.

What is a Record?

A "record" is defined as any "document, book, paper, photograph, map, sound recording or other material, regardless of physical form or characteristics, made or received pursuant to law or in connection with the transaction of official business" (109.210(5) RSMo). This definition includes those records created, used and maintained in electronic form.

Non-Records

Even though records include a broad spectrum of recorded information, not all recorded information is a record. According to Section 109.210(5) RSMo, the following are not records: "...Library and museum material made or acquired and preserved solely for reference or exhibition purposes, extra copies of documents preserved only for convenience of reference, and stocks of publications and of processed documents are not included within the definition of records..."

Other examples of non-records include the following materials:

- Identical copies of documents maintained in the same file.
- Extra copies of printed or processed materials (official copies of which are retained by the office of record).
- Superseded manuals and other directives (maintained outside the office of record).
- Materials documenting employee fringe activities (blood donors, charitable funds, social and professional meetings, etc.)
- Work papers and drafts of reports or correspondence. Transcribed stenographic materials.
- Blank forms.
- Materials received from other activities that require no action (official copies of which are retained by the office of record).
• Catalogs, trade journals and other publications or papers received from government agencies, commercial firms or private institutions that require no action and are not part of an action case record.
• Survey forms

Non-records do not require retention scheduling or destruction authorization or reporting. To control excessive accumulation, it is necessary to keep only current, useful materials and to destroy non-records immediately after needs have been satisfied. Avoid filing non-record material with records.

The Value of Local Government Records
Some records, because of their enduring administrative, fiscal, legal or historical value, should be permanently retained. These records require that special care and consideration be given to their storage conditions and the feasibility of preservation microfilming. Examples of permanent records include year-end reports; minutes; property records such as deeds; and birth, death and marriage records.

Most records do not have values that warrant their permanent preservation. Those records with short-term value should, upon reaching end of the retention period, be destroyed.

Statutory Authority for Establishing Records Retention Requirements
In 1965, the Missouri General Assembly established a State Records Commission to approve retentions for records produced by state agencies. In 1972, Missouri's Business and Public Records Law (Chapter 109) was expanded to include local government. Thus, the Missouri Local Records Board was established to set retention times for local government records. The 16-member board, chaired by the Secretary of State, consists of local government officials from all classes of counties and cities, elementary and secondary education, higher education and a person active in historical society groups.

Supplemental to the Local Records Board, the Records Management and Archives Service of the Secretary of State's office provides assistance to local governments and implements board policy.

Application of the Records Retention Schedule
This schedule establishes minimum retention periods and authorizes dispositions for many of the administrative, fiscal and legal records common to most local governments. Retention periods are based upon federal and state mandates, record surveys, business needs, and general knowledge as to how long records should be kept. Using the schedule as a guide and without seeking further approval from the Local Records Board, any local government may regularly dispose of any of its records that appear on this schedule. The schedule is subject to the following exceptions and limitations:

A. Local government offices may retain any of their records beyond the retention periods set by the schedule, as they deem necessary. The schedule establishes only a minimum period of retention. Before retaining a record longer than the minimum time required, however, the office should be certain that it has good reason to do so. Unnecessary retention of records can be expensive in space and filing equipment and may expose the office to costly litigation and discovery requirements.

B. This schedule does not relieve local governments of retention requirements mandated by other state and federal statutes and regulations. When such an obligation does exist, then the longer retention period takes precedence.

C. This schedule generally reflects audit requirements in its prescribed retention periods, but audits are not always completed in a timely fashion. Therefore, any record required for an audit must be retained until completion of that audit, regardless of its stated retention period in the schedule.

D. This schedule does not authorize destruction of records that could be deemed relevant to current or pending litigation.

Retention and disposition of records that are common to many offices are included in the General Schedule. Records unique to particular offices are addressed in individual office schedules. All schedules are available on the Secretary of State's website at http://www.sos.mo.gov/archives/localrecs/schedules.

Destruction of Records
The records classification and retention periods in this manual constitute legal authority for retention and disposal of official records. No records can be destroyed until they meet the minimum retention period listed in this manual. In cases where there is no schedule for a particular record series, the Local Records Board must grant permission for the destruction.

Introduction
The disposition of records should be recorded in a document such as the minutes of the city council or other legally constituted authority that has permanent record status. The record should include the description and quantity of each record series disposed of, manner of destruction, inclusive dates covered and the date on which destruction was accomplished.

The retention schedule does not prescribe the method of destruction (shredding, burning, landfills, etc.), however, record series with a disposition of *Destroy securely* contain confidential data. These records should be destroyed under the supervision of a competent person(s) designated (or appointed) to ensure that no records fall into unauthorized hands and that the data cannot be reconstructed.

When records, open or confidential, have been destroyed by decay, vermin, fire, water or other means making their remains illegible, the custodian of records may dispose of the remains after verification and documentation by the Local Records Program, Office of the Secretary of State.

**Preservation of Permanent Records**

A fundamental, yet often neglected obligation of local government is to care for the permanent records it generates and receives regardless of format. The records, both electronic and physical, that have been identified as permanent require special handling and storage if they are to be preserved. The continuous interaction between a physical record's medium: paper, magnetic tape, film, etc. - and the quality of the environment in which it is kept-temperature, humidity, light, and air-determines the severity and rate of its deterioration. For electronic records the concerns include media decay, hardware/software obsolescence, and migration of data into the current standard: PDF-A, TIF, etc.

By imaging permanently valuable records, local governments can generate durable microfilm for preservation and disaster recovery, while also maintaining an electronic version for access. When microfilmed, processed, and maintained to archival specifications, a master negative will ensure that permanently valuable records are preserved for generations to come (microfilm has an estimated shelf life of over 500 years). Microfilm that meets the standards outlined here is eligible to be stored by the Missouri State Archives at no cost.

The Missouri Local Records Grant program can provide financial assistance in the form of grants-in-aid to supplement local funds for preservation initiatives, such as archival supplies, shelving and preservation microfilming.

**Reformatting Standards**

In accordance with RSMo 109.241.4, the Local Records Board has adopted the following standards for microfilm and digitized records. To be in compliance for image permanence, microfilm must conform to the technical standards outlined in the *Guidelines for Microfilming Public Records*, drafted by the Local Records Program and available on the Secretary of State’s website at: [http://www.sos.mo.gov/archives/pubs/mfmg](http://www.sos.mo.gov/archives/pubs/mfmg). To ensure the permanence of electronic records and digitized records, electronic records management systems must meet the standards outlined in the most current version of ISO 15489. Certification that records have been reformatted in accordance with these standards should be maintained locally and classified under General Records Retention Schedule “GS 018 Records Management Records.”

**A Note about Retention Periods**

This schedule provides minimum retentions. Local authorities may choose to keep a particular series or record for a longer period of time. It should be kept in mind, however, that a record kept beyond its listed retention must be made available for inspection upon request.

The point at which a retention period begins is termed a cutoff, or trigger. Typically this is on a regular cycle—the end of the calendar year, the end of the fiscal year, etc. This is the period of the inactive record. A traditional example of this would be the period when records are boxed and removed from active file cabinets and work areas.

When determining cutoffs, a good rubric is outlined in DoD 5015.02 “Electronic Records Management Software Applications Design Criteria Standard”:

A. retention periods of less than 1 Year, the cutoff is equal to the retention period;
B. retention periods of 1 Year, or more, the cutoff is at the end of the fiscal or calendar year;
C. for records with a retention period based on an event or action, the cutoff is the date the action is completed;

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Introduction
D. for records with a retention period based on a specific time period after an event or action, apply the retention period after the action is complete.

Retention Definitions:

**COA=Completion of Audit.** Note that COA is coupled with a lot of 5-year entries to help encourage regular audits. Not all jurisdictions are required to have audits by statute. Audits for some municipalities are governed by the level of federal financing for bonds and public improvements, and thus are governed by federal retentions. Most municipalities are governed by their local authority (alderman, council, mayor, etc.) for auditing policy. Local jurisdictions may consult RSMo 29 to review the State Auditor’s chapter for petition audits (see RSMo 250 for large capital projects such as bonds for water and sewer). For general auditing explanations and advice we recommend that clerks contact the State Auditor’s office at 573.751.4213.

**DCA=Destroy in Current Area/Reference.** Series with these retentions are considered “reference” records and may be destroyed when they are no longer of use.

Modifications and Additions

Because records reflect activities that are constantly changing, the retention requirements for them sometimes require revision as well. Consequently, records retention and disposition schedules often need modification or additions in order to be realistic and effective. Furthermore, because local governments are so large, it is impractical to consult with every office regarding specific schedule entries. There may be some retention periods and disposition requirements within this schedule that fail to account for all relevant factors and there may be some important record series not addressed here which need to be added. The Local Records Program welcomes all comments and suggestions concerned with improvement of record retention schedules through modifications and additions.

For further information on any records management or preservation issue, please contact:

Missouri Secretary of State
Local Records Preservation Program
PO Box 1747, Jefferson City, MO 65101-1747
Telephone: (573) 751-9047
local.records@sos.mo.gov

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Public School Records Retention Schedule

See also the General Records Retention Schedule.

Administration

**SCH001**
**Also Called:**
**Function:**
**Content:**
**Minimum Retention:**
**Disposition:**
**Note:**
**Approval Date:**

**Annual Secretary of the Board of Education Report**
ASBR
Financial record of the district's receipts and disbursements for the fiscal year
Permanent
Archive

**SCH003**
**Also Called:**
**Function:**
**Content:**
**Minimum Retention:**
**Disposition:**
**Note:**
**Approval Date:**

**District Reorganization Records**
Verify appointment of new board members annually and included in board packet
Oath of office, notice of election, election results, appointment of custodian of records and MSBA delegates
Permanent
Archive
See RSMO 162.152; 162.171; 162.181; 162.841

**SCH004**
**Also Called:**
**Function:**
**Content:**
**Minimum Retention:**
**Disposition:**
**Note:**
**Approval Date:**

**Missouri School Improvement Program Report**
MSIP; Final Report; State Board of Education Summary; Notice of Classification; Annual Performance Report
Report submitted to Department of Elementary and Secondary Education documenting the district's performance on MSIP standards. Used to determine accreditation and track performance standards.
Report includes: academic achievement, subgroup achievement, college and career readiness, high school readiness, attendance rate, graduation rate
Permanent
Archive

**SCH005**
**Also Called:**
**Function:**
**Content:**
**Minimum Retention:**
**Disposition:**
**Note:**
**Approval Date:**

**Post High School Status Reports**
1 year follow-up; 5 year follow-up; 180-day follow-up
Core data file that tracks student activity after graduation.
May include: student name, what student predicted they would do after graduation, what they are doing after graduation, list of career courses taken
Retain until superseded
Destroy
This is based on a template from DESE related to MSIP Standard 3 regarding college and career readiness.
SCH006
Also Called: Written Curriculum Guide
Function: Documents curriculum used in the district, aligned with Missouri Learning Standards
Content:
Minimum Retention: Retain until superseded
Disposition: Destroy
Note: Approval Date:

SCH007
Also Called: School Improvement Plan
Function: Details mission, vision, goals and objectives for school district that ensure that students meet or exceed grade-level standards established by the state board of education
Content:
Minimum Retention: Retain until superseded
Disposition: Destroy
Note: See RSMo 160.514; 162.1100
Approval Date:

SCH008
Also Called: MSIP Supporting Documentation
Function: Data Files
Content: Data collected to generate MSIP Annual Performance Report
Minimum Retention: 1 year after completion of cycle
Disposition: Destroy
Note: Approval Date:

SCH010
Also Called: Core Data--Source Documents
Function: General data collected by school district and reported 6 times per year to DESE Core Data Collection System
Content: Includes information used in producing School Directory, estimated ADA, actual summer school attendance, planned school calendar data, LEP census data, educators, courses and assignments, enrollment, gifted education, information for federal special education reports, home schooled count, free and reduced lunch count, December 31 ending fund balance, census of technology, end-of-year data, library media center, discipline, school calendar, special education exit counts, secondary headcount, attendance, Resident II Attendance, Resident II gpa, Physical Fitness Assessment, Professional Development, Summer School Courses and Enrollment
Minimum Retention: 5 years or as otherwise indicated
Disposition: Destroy
Note: Approval Date:

SCH011
Also Called: Application for Summer School Approval
Function: District application to DESE to hold summer school
Content: Includes: School district information, summer school director information, dates of summer school, program information, estimated enrollment, dates of operation, hours of operation, superintendent certification
Minimum Retention: 5 Years
Disposition: Destroy
Note: Approval Date:

Administration
SCH012  Multiple Consortium Co-ops Legal, Technical, Special Ed., Professional Development

Also Called:
Function:
Content:
Minimum Retention: 5 Years
Disposition: Destroy
Note:
Approval Date:

SCH084  Statement of Intention to Employ a Minor

Also Called:
Function: Certificate to Employ a Minor; Certificate of Age for Employment of Minors; Work Certificates
Content: Documents permission granted or denied to a student, aged 14 to 15 years to work at any job during the school year. These permissions are issued by 1) the public school superintendent, 2) the CEO of the charter school, 3) the school principal, or 4) the designee of any of the aforesaid officials.
Minimum Retention: 5 years + audit
Disposition: Destroy
Note: This record is mandated by the Missouri Department of Labor. The required forms are available from the Division of Labor Standards http://labor.mo.gov/DLS/YouthEmployment/work_cert_permit.asp. Please see RSMo chapter 294.
Approval Date:

SCH183  Excused Absences

Also Called: Parent Note; Doctor's Note
Function: Note from doctor or parent explaining student absences
Content:
Minimum Retention: End of the School Year + 1 Year
Disposition: Destroy
Note:
Approval Date: August 23, 2023

Candidacy Records

Also Called: Declaration of Candidate for Nomination; Declaration of Intent of Write-in Candidate; Candidate Withdrawal; Filing Fee Receipt
Note: See Election Authority Schedule, 028.009
Adult Education

SCH015
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Application to State for Reimbursement

5 Years
Destroy

SCH016
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Employment and Training Record of Students Follow-up

5 Years
Destroy
# Buildings and Grounds

For Other Building and Grounds Records, Please Refer to General Schedule

<table>
<thead>
<tr>
<th>SCH019</th>
<th>Americans with Disabilities Act Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>ADA Plan</td>
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<tr>
<td>Function:</td>
<td></td>
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<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Minimum Retention:</td>
<td>3 years, or until superseded; review for historical purposes</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy*</td>
</tr>
<tr>
<td>Note:</td>
<td>*If determined to be historically significant, Archive</td>
</tr>
<tr>
<td>Approval Date:</td>
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<table>
<thead>
<tr>
<th>SCH020</th>
<th>Federal Environmental Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Asbestos Hazardous Emergency Response Act (AHERA) report</td>
</tr>
<tr>
<td>Function:</td>
<td>Documents environmental inspections of school facilities</td>
</tr>
<tr>
<td>Content:</td>
<td>Reports on asbestos, lead, radon, etc.</td>
</tr>
<tr>
<td>Minimum Retention:</td>
<td>Until Superseded + 6 Years*</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Archive</td>
</tr>
<tr>
<td>Note:</td>
<td>Under AHERA, triennial reinspections are required. *In the case of a final report, which will not be superseded, maintain permanently.</td>
</tr>
<tr>
<td>Approval Date:</td>
<td>Revised, August 19, 2014</td>
</tr>
</tbody>
</table>
Business Affairs

SCH026
Also Called: Assessed Valuation Certification
Function: Letter from county certifying real and personal property valuation of district
Content: Permanent
Minimum Retention: Archive
Disposition: Note:
Approval Date:

SCH027
Also Called: Bound Book Generated by Bond Counsel
Function: School Bonds, general obligation bonds, leasehold revenue bonds, quality school construction bonds, Build America bonds
Content: Financial records documenting bond issues
Minimum Retention: Maturity + 3 years
Disposition: Destroy
Note: Approval Date:
August 24, 2010

SCH028
Also Called: Sales Tax Exemption Letters
Function: Documents district’s exemption from sales tax when making purchases
Content: Retain until superseded
Minimum Retention: Destroy
Disposition: Note:

SCH029
Also Called: Tax Exemption Certificate
Function: Tax ID letter confirming exempt status
Content: Retain until superseded
Minimum Retention: Destroy
Disposition: Note:

SCH032
Also Called: Surety Bonds
Function: Performance Bonds
Content: Official performance bonds from school officials
Minimum Retention: Completion of Audit + 5 years
Disposition: Destroy
Note: Treasurer is the only official required to file bond; construction work requires contractor to file surety bond
Approval Date:

SCH035
Also Called: Certification of Property Tax Rates
Function: Documents tax rates, generated by State Auditor and sent to County Clerk
Content: Completion of Audit
Minimum Retention: Destroy
Disposition: Note:
Approval Date:
This is a copy of a record kept by the County Clerk.

Federal Programs
Estimate of Required Local Taxes

Documents tax rates, generated by State Auditor and sent to County Clerk

Completion of Audit
Destroy
This is a copy of a record kept by the County Clerk.

Federal Programs

Title I
Records relating to federal programs for Educationally Deprived Children
3 years after program year
Destroy

Title II
3 years after program year
Destroy

Title II-D e-MINTS Grant (competitive)
5 years
Destroy

Title III
Records relating to federal programs for English language acquisition
3 years after program year
Destroy

Title IV
3 years after program year
Destroy
<table>
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<tr>
<th>SCH042</th>
<th>Title V</th>
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<td>Function:</td>
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<td>Content:</td>
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<tr>
<td>Minimum Retention:</td>
<td>3 years after program year</td>
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<td>Disposition:</td>
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<td>Note:</td>
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<thead>
<tr>
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<th>Federal Discretionary Grant Programs</th>
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<td>Content:</td>
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<tr>
<td>Minimum Retention:</td>
<td>3 years after program year</td>
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<td>Disposition:</td>
<td>Destroy</td>
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<th>Federal Impact-aid P.L. 815 &amp; P.L. 874</th>
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<td>Function:</td>
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<td>Content:</td>
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<td>Disposition:</td>
<td>Destroy</td>
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<td>Note:</td>
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<thead>
<tr>
<th>SCH173</th>
<th>Medicaid Records/Payments</th>
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<td>Also Called:</td>
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<td>Function:</td>
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<td>Content:</td>
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<tr>
<td>Minimum Retention:</td>
<td>3 years after program year</td>
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<tr>
<td>Disposition:</td>
<td>Destroy</td>
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<td>Note:</td>
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<td>Approval Date:</td>
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</table>
### Food Services

**SCH045**  
**Also Called:**  
**Function:**

**Content:**
Minimum Retention:  
Disposition:  
Note:  
Approval Date:

**Food Application Agreements**  
National School Lunch; Food Distribution; Special Milk; School Breakfast Program  
Agreement between local education agency and State Agency Coordinator, School Food Services, detailing general and record-keeping requirements for national school lunch, school breakfast, after-school snack, special milk and donated food programs

- 3 Years after fiscal year
- Destroy
- See: 7 CFR 210 on USDA food assistance programs
- Revised August 19, 2014

**SCH177**  
**Also Called:**  

**Function:**

**Content:**
Minimum Retention:  
Disposition:  
Note:  
Approval Date:

**Food Service Records**  
Application for Free or Reduced Price Meals; Lunch, Milk, and Breakfast Claim for Reimbursement; December 31 Commodity Inventory*; Cafeteria Records and Reports; Cafeteria Register Tapes

- 3 years
- Destroy
- *Food Management Company Schools Only; Replaces SCH046, 047, 048, 049, 050
- August 20, 2013
Health Records

SCH051
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Student Cumulative Health Record

10 years, or until the student turns 23, whichever is longer
Destroyed

Revised August 28, 2012

SCH052
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Immunization Records

Provides verification of immunizations received, or immunization exemptions (religious, medical or parental)

3 years after leaving school, or graduating
Destroyed

August 25, 2009; Revised August 28, 2012

SCH053
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Immunization--In Progress

Document verifying student is current until next scheduled immunization is due.
Card submitted by doctor or health department stating what immunizations student has received and indicating when they will be up-to-date.
Until next dose is due; destroy when temporary exemption status has passed
Information is destroyed when immunization is complete
August 25, 2009

SCH054
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Emergency Contact Record

May contain: student name, address, parent information, doctor's name, hospital preference, medical history.
1 Year*
Destroyed
*Maintain only current contact information.
Revised August 19, 2014

SCH061
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Health Care Plans

Summary of the nursing plan of care for a student with special health needs

1 year
Destroyed
Evaluate annually--may be a part of the Individual Education Plan--IEP
**SCH062**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Head Injury Note**

Documents any head injury sustained by student at school.

1 year

Destroy

Need only be kept for the current year if the information contained within the document has been summarized and recorded onto the individual clinic record or onto the cumulative health record.

**Approval Date:**

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**SCH063**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Daily Clinic Log**

List of all students seen on any given day.

1 year

Destroy

This record is not considered to be adequate to document individualized care. Need only be kept for the current year if the information contained within the document has been summarized and recorded onto the individual clinic record or onto the cumulative health record.

**Approval Date:**

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**SCH174**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Medical Treatments, Reports and Evaluations**

Clinic Record; Nursing Documentation; Medication Record; Treatment Records; Physician Orders for Specialized Treatments/Procedures; Behavioral Assessment Tool*; Accident Reports#; Child Abuse/Neglect Documentation; Screening Reports of Medical Professionals; Sports Medicine Records

Documents treatments, drug distribution and other services through school nurse's office.

Individual documentation of each clinic visit/assessment/care provided. May include: Asthma peak flow records; seizure logs; catheterization records; G-tube feeding record; Medical reports from accidents (diagnosis, hospital records, audiology reports, etc.)

Until student reaches age 23

Destroy

*To assess drug/alcohol use; #Physician releases to return to school/sports participation or to be excluded from such. Replaces SCH055, 056, 058, 059, 064, 065, 066, 067

**Approval Date:**

August 20, 2013; Updated August 25, 2015

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**SCH175**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Medical Consents**

Medication Consents; Consents for Specialized Treatments/Procedures

Permissions granted by parent/guardian/physician

Until student reaches age 23

Destroy

Replaces SCH057, 060

**Approval Date:**

August 20, 2013

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**SCH180**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Approval Date:**

**Student Physical Records**

Athletic Physicals; Extracurricular Activities Schedules

Annual physicals documenting fitness to participate in school sponsored extracurricular activities

1 Year

Destroy Securely

Confidential Records

**Approval Date:**

August 25, 2015
SCH181  
**Student Drug/Alcohol Testing Records**  
**Also Called:** Drug Screening Records  
**Function:** Documents the testing of students for controlled substances prohibited by policy, procedure or statute.  
**Content:** Records may include but are not limited to the documentation of test results, the collection process, the random sample process.  
**Minimum Retention:** Retain positive test results until student graduates or leaves district; retain negative test 1 Year  
**Disposition:** Destroy Securely  
**Note:** Confidential Records  
**Approval Date:** August 25, 2015
Instruction

SCH069
Also Called: District Test Assessments
Function: Documents District-level performance on standardized tests, including, but not limited to: MAP, MMAT, EOC, MAPA, College and Career Readiness Assessments, ACT, SAT, ASVAB, TSA, Terra Nova, DRA, SRI.

Content:
Minimum Retention: 15 Years
Disposition: Destroy
Note: These are aggregate test scores for the district as a whole. Individual student scores will be part of the student record.
Approval Date: Revised August 19, 2014

SCH070
Also Called: Textbook Inventory
Function: Inventory of textbooks for each school.

Content:
Minimum Retention: Retain until superseded
Disposition: Destroy
Note: Approval Date:

SCH071
Also Called: Teacher's grade book
Function: Content:
Minimum Retention: 2 years
Disposition: Destroy
Note: Approval Date:

SCH074
Also Called: Counselor Records
Function: Documents meetings between guidance counselors and students.
Content: May include: notes taken by counselor, discipline reports, record of meeting.
Minimum Retention: Destroy in Current Area
Disposition: Destroy Securely
Note: Confidential records
Approval Date:

SCH075
Also Called: Teacher Plans, Programs, Recommendations
Function: Content:
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: Approval Date:
SCH178
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Driver Education
Application for Approval for Matching Federal Funds to Train Driver Education Teachers;
Application for Federal Matching Funds to Purchase Driver Education Simulation Equipment

Destroy in Current Area
Destroy
Replaces SCH072, 073
August 20, 2013
### Personnel

**For Other Personnel Records see General Schedule**

#### SCH083
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:**
- **Disposition:**
- **Note:**
- **Approval Date:**

**Substitute Teacher Record**
Documents qualifications and performance of substitute teachers
May contain evaluations of substitute, substitute certificate, background checks, application, letters informing parents of long-term substitute assignment
3 years
Destroy
This series may be obsolete.

#### SCH182
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:**
- **Disposition:**
- **Note:**
- **Approval Date:**

**Student Teacher Records**
Documents Student-Teacher observation, supervised and independent classroom teaching during education rotation with a school
May include: correspondence with colleges/universities, school approvals, assignments and evaluations
3 Years after separation
Destroy Securely

Approval Date: August 24, 2022
Special Education

SCH087
Also Called: Annual Report of Exceptional Pupil Programs
Function: Content:
Minimum Retention: 3 years
Disposition: Destroy
Note: This record is now a part of the ASBR SCH001.
Approval Date: Revised August 20, 2013

SCH092
Also Called: Individuals with Disabilities Education Act (IDEA) Entitlement Grants
Function: Applications for Special Education Programs, Application for Exceptional Pupil
Content: Programs; Remedial Speech and Hearing Class Applications; Applications for Home
Minimum Retention: 3 years
Teaching for Home-bound Instruction; Applications Report of Exceptional Pupil Programs
Disposition: Destroy
Note: This series consolidates SCH088, 089, 090, 091, with 092 from the previous schedule. Many of these applications are now done through DESE and no local records are generated.
Approval Date: Revised, August 20, 2013

SCH093
Also Called: 619 Early Childhood Special Education Grants
Function: 619 Early Childhood Special Education Records; ECSE
Content: Reports verifying expenditures of funds
Minimum Retention: 3 years
ECSE Final Expenditure Report—expenditure detail, contact information core data
Disposition: personnel, equipment expenditures, third-party contracts, extended school year,
Note: operation of plant, staff mileage, supplies, transportation, personnel development, child
Approval Date: Revised August 20, 2013

SCH097
Also Called: Student Special Education Record
Function: Chapter Programs; Individuals with Disabilities Education Act Data; Title Programs
Content: Record of Access Form; Documentation of Screening; Program Modifications;
Minimum Retention: Evaluations Plans; Notice and/or Consent forms for Evaluation; Diagnostic Summaries;
Disposition: Individualized Education Programs (IEPs); Notice and/or Consent Forms Placement and
Note: Documentation of the Provisions of Appropriate Procedural Safeguards.
Approval Date: 3 Years from date of last service Revised August 19, 2014; Revised August 24, 2016

Note: This is subject to requirements of the State Compliance Plan for Part B. These Special Education records are independent of the student cumulative record and are not permanent records.
**SCH098**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Individuals with Disabilities Education Act (IDEA)**

Reports Documenting expenditures and proposed expenditures.
Final expense report, maintenance of effort, child count, amendment, budget grid, request for payment, payment grid
Subject to Federal Requirements

Under federal requirements, IDEA demands that destruction of records will not take place until 3 years past the time the child no longer receives IDEA services which is in most cases 3 years past graduation. However, even if the destruction is not occurring until after the 3 year minimum guideline, the school district must attempt to notify the parents or eligible student. Consult with DESE, Special Education for the most current federal regulations

**Approval Date:**

---

**SCH099**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Local Compliance Plan and Monitoring Documentation**

Documents the local school district's version of the state compliance plan
Retain until superseded
Destroy
Combined with SCH100
Revised August 20, 2013

**Approval Date:**

---

**SCH179**

**Also Called:**

**Function:**

**Content:**

**Minimum Retention:**

**Disposition:**

**Note:**

**Special Education--Pupil Test Protocols, Scores, Evaluations**

Test Protocols
Documents Individualized Education Program (IEP) test protocols, scores, and evaluations

3 Years after last service
Destroy
This series combines former series entries SCH095 with SCH096.
August 20, 2013; Revised August 19, 2014

**Approval Date:**
## State Programs

### SCH102
**At Risk Student Programs**
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:** 5 years
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH103
**Career Ladder Records**
- **Also Called:**
- **Function:** Documents teachers who achieve national board certification
- **Content:** List of certified teachers and letters confirming certification
- **Minimum Retention:** 5 years
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH104
**Child Care Development Fund Grant (Block Grant)**
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:** 5 years
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH105
**Drop Out Data**
- **Also Called:**
- **Function:**
- **Content:** Documents Student drop-outs
- **Minimum Retention:** Monthly report submitted to DESE.
- **Disposition:** 5 years
- **Note:** Destroy
- **Kept as part of Core Data**
- **Approval Date:**

### SCH106
**Minimum Salary Supplement**
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:** 5 years
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH107
**Parents as Teacher Project Records**
- **Also Called:**
- **Function:** Documents district's participation in the Parents as Teachers Program
- **Content:** May include: home visits, child screening, high needs characteristics, and data collection
- **Minimum Retention:** 5 years
- **Disposition:** Destroy
- **Note:** Generated and submitted on a DESE form, used for program funding.
- **Approval Date:**
Missouri Preschool Project Grant

The Missouri Preschool Program Invitation for Bid/Invitation for Grant (IFB/IFG) is for programs that will result in new or expansion of early care and education programs for children who are one or two years from kindergarten eligibility.

5 years
Destroy

Professional Development Committee Records

Records generated by district-level committee that oversees professional development of district's teachers

Agendas, minutes, budget, by-laws, reports of professional development.

5 years
Destroy

Teacher Education Scholarships

5 years
Destroy

School Board Member Training Records

Documents training of school board members
May include: hours of training, date, name of class, and certificate.

Duration of service
Destroy

State Gifted Records

Documents district's gifted program, participation and requirements
May include: testing protocols, test results, evaluation forms

5 years
Destroy
May be kept as part of student record.

State Grants

Health; A+ Schools; Vocational Enhancement; etc.

5 years
Destroy
**SCH114**

*Also Called:*  
*Function:*  
*Content:*  

Minimum Retention:  
Disposition:  
Note:  
Approval Date:  

**Summer School Records**

Documents summer school approvals from DESE and student enrollments  
May include: Summer School Checklist and Final Approval Form (DESE); district enrollment forms  
5 years  
Destroy  
Grades should be filed with the student transcript.

**SCH115**

*Also Called:*  
*Function:*  
*Content:*  

Minimum Retention:  
Disposition:  
Note:  
Approval Date:  

**Technology Plans**

Documents district plans for integrating and utilizing technology for both teaching and learning.  
May include: objectives and goals related to student learning; teacher preparation; administration, data management, communication processes; resource distribution; technical support  
5 years  
Destroy

**SCH116**

*Also Called:*  
*Function:*  
*Content:*  

Minimum Retention:  
Disposition:  
Note:  
Approval Date:  

**Tuition Reimbursement**

5 years  
Destroy

State Programs
# Student Activities

<table>
<thead>
<tr>
<th>SCH117</th>
<th>Year Books</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Also Called:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Function:</strong></td>
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<td><strong>Minimum Retention:</strong></td>
<td>Permanent</td>
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<td><strong>Disposition:</strong></td>
<td>Archive</td>
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<td><strong>Note:</strong></td>
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<td><strong>Approval Date:</strong></td>
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<table>
<thead>
<tr>
<th>SCH118</th>
<th>Student Policy Handbook</th>
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<tbody>
<tr>
<td><strong>Also Called:</strong></td>
<td>Board of Education Rules and Regulations</td>
</tr>
<tr>
<td><strong>Function:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Content:</strong></td>
<td></td>
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<tr>
<td><strong>Minimum Retention:</strong></td>
<td>Until superseded + 7 Years</td>
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<td><strong>Disposition:</strong></td>
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<td><strong>Note:</strong></td>
<td>Revised August 19, 2014</td>
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<td><strong>Approval Date:</strong></td>
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<tr>
<th>SCH119</th>
<th>Scorebooks (Athletics)</th>
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<td><strong>Function:</strong></td>
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<td><strong>Content:</strong></td>
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<td><strong>Minimum Retention:</strong></td>
<td>5 years</td>
</tr>
<tr>
<td><strong>Disposition:</strong></td>
<td>Destroy</td>
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<tr>
<td><strong>Note:</strong></td>
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<td><strong>Approval Date:</strong></td>
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<tr>
<th>SCH123</th>
<th>Athletic Conference Reports</th>
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<tr>
<td><strong>Also Called:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Function:</strong></td>
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</tr>
<tr>
<td><strong>Content:</strong></td>
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</tr>
<tr>
<td><strong>Minimum Retention:</strong></td>
<td>1 year</td>
</tr>
<tr>
<td><strong>Disposition:</strong></td>
<td>Destroy</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td></td>
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<td><strong>Approval Date:</strong></td>
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<table>
<thead>
<tr>
<th>SCH124</th>
<th>Eligibility Certificates</th>
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<tbody>
<tr>
<td><strong>Also Called:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Function:</strong></td>
<td>Document student eligibility to engage in extracurricular activities.</td>
</tr>
<tr>
<td><strong>Content:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Minimum Retention:</strong></td>
<td>1 year</td>
</tr>
<tr>
<td><strong>Disposition:</strong></td>
<td>Destroy</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>These are now accessed and completed online through MSHAA</td>
</tr>
<tr>
<td><strong>Approval Date:</strong></td>
<td></td>
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<table>
<thead>
<tr>
<th>SCH125</th>
<th>Events Schedules</th>
</tr>
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<tbody>
<tr>
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<td><strong>Function:</strong></td>
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<td><strong>Content:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Minimum Retention:</strong></td>
<td>1 year</td>
</tr>
<tr>
<td><strong>Disposition:</strong></td>
<td>Destroy</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Approval Date:</strong></td>
<td></td>
</tr>
</tbody>
</table>
### SCH126
**Scholarship Awards**
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:** 1 year
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH128
**Physical Education Excuses**
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:** Destroy in Current Area
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH129
**Alumni Lists**
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:** Destroy in Current Area
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH130
**Career and Technical Student Organization Records**
- **Also Called:** Future Business Leaders of America; Family, Careers and Community Leaders of America; FFA; DECA; Skills USA; Student Council; etc.
- **Function:** Document activities of district’s chapters of national organizations.
- **Content:** May include: record of expenses, rosters, meeting minutes.
- **Minimum Retention:** Destroy in Current Area
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**

### SCH131
**School Club and Organization By-laws**
- **Also Called:**
- **Function:**
- **Content:**
- **Minimum Retention:** Destroy in Current Area
- **Disposition:** Destroy
- **Note:**
- **Approval Date:**
Student Records

SCH132
Also Called: Student Cumulative Record--Transcripts
Function: 
Content: May include: Grades; birth record; gpa; class rank; college prep certificates; standardized test scores
Minimum Retention: 75 Years
Disposition: Destroy
Note: If elementary, middle or junior high school records have been transferred to the Senior High Record, then the transferring school’s record is considered a non-record and may be destroyed. This series also includes SCH014 Class and Grade Reports for Individual Students and SCH165 Student Folders, which were previously classified under Adult and Career Education
Approval Date: August 25, 2009; Revised August 20, 2013; Revised August 19, 2014

SCH133
Also Called: Student Cumulative Record--Other
Function: 
Content: Any non-transcript material as defined in SCH132
Minimum Retention: 5 years after graduation or leaving school
Disposition: Destroy
Note: Includes information previously categorized under SCH137; includes English Language Learner (ELL) or English as a Second Language (ESL) records
Approval Date: August 25, 2009; Revised August 20, 2013; Updated July 21, 2023

SCH138
Also Called: Records of Serious Discipline Violations
Function: Committee on Conduct Records
Content: Documents student violations of the school’s code of conduct as well as violations of the Safe Schools Act, and actions taken.
May include: correspondence; report to superintendent; incident information; supporting documentation; guidance reports; summary of investigation; student discipline record; determination review; code of conduct meeting minutes
Minimum Retention: Until student reaches age 23
Disposition: Destroy
Note: See RSMo 167.020 subsection 7 and 160.261 subsection 9
Approval Date:

SCH139
Also Called: Student Accident Insurance Information
Function: Documents accident insurance that is available for parent purchase
Content: May include: fliers for program, rate information, etc.
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: Approval Date:

SCH140
Also Called: New Student Orientation Schedules
Function: 
Content: 
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: Revised August 19, 2014
Approval Date:
SCH141
Also Called: School Publications Information
Function: 
Content: 
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: 
Approval Date: 

SCH142
Also Called: Class Meeting Minutes
Function: 
Content: 
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: 
Approval Date: 

SCH143
Also Called: Class Rosters
Function: 
Content: 
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: 
Approval Date: 

SCH144
Also Called: Current Class Schedule of District
Function: 
Content: Master schedule of all classes in all schools in the district
May include: school, class, teacher name, student names, student IDs
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: 
Approval Date: 

SCH145
Also Called: Deficiency Report
Function: 
Content: 
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note: 
Approval Date: 

SCH146
Also Called: Graduation Records
Function: Commencement Records; End of Year Activity Arrangements
Content: 
Minimum Retention: 1 year
Disposition: Destroy
Note: 
Approval Date: 

Student Records
SCH147
Also Called: Graduation Records--A+ student records
Function:
Content:
Minimum Retention: 10 Years
Disposition: Destroy
Note:
Approval Date: Revised, August 20 2013

SCH148
Also Called: Honor Roll Lists
Function:
Content:
Minimum Retention: 1 year
Disposition: Destroy
Note:
Approval Date:

SCH149
Also Called: Student Awards
Function:
Content:
Minimum Retention: 1 year
Disposition: Destroy
Note:
Approval Date:

SCH150
Also Called: Letter Grade Distribution by Class
Function:
Content:
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note:
Approval Date:

SCH151
Also Called: Student Directory
Function:
Content:
Minimum Retention: Destroy in Current Area
Disposition: Destroy
Note:
Approval Date:

SCH176
Also Called: Student Registration Records
Function:
Content:
Minimum Retention: 10 Years after leaving school
Disposition: Destroy
Note:
Approval Date: 

These records are distinct from the student cumulative record and should be maintained as a separate file. This series replaces SCH134, 135, 136. August 20, 2013
Transportation
For Vehicle Maintenance and Ownership Records see General Schedule

SCH153
Also Called: Annual Bus Route Approval Report
Function: Transportation Route Approval
Content: Records submitted for approval of bus routes
May include: driver names, routes and time, mileage, school name, anticipated rider counts
Minimum Retention: 3 years
Disposition: Destroy
Note:
Approval Date:

SCH154
Also Called: Ridership Lists
Function: Ridership counts
Content: Documents verification of students riding school-provided transportation.
May include: route, driver name, bus number, list of riders by schools and route number, student name, grade, ID number, distance transported, bus stop location, report generated from preceding data
Minimum Retention: 3 years
Disposition: Destroy
Note:
Approval Date:

SCH156
Also Called: Annual Bus Driver Certification
Function: Annual Physical Examination; Copy of Drivers’ CDL
Content:
Minimum Retention: 1 year
Disposition: Destroy
Note:
Approval Date:

Career Education

SCH159
Also Called: Reimbursement for salaries for Career Education Programs
Function:
Content:
Minimum Retention: 5 years
Disposition: Destroy
Note:
Approval Date:

SCH160
Also Called: Application for Authorization to Purchase Equipment/Supplies
Function:
Content: Application to spend federal Perkins fund money for equipment and/or supplies for use in technical schools.
May include: DESE forms FV2, FV4; enhancement application for grant money
Minimum Retention: 5 years
Disposition: Destroy
Note: Funding made available through “Carl D. Perkins Vocational and Technical Education Act, Public Law 105-332”
Approval Date:
SCH161
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Reimbursement Request for Approved Expenditures
Application to reimbursement for equipment and/or supplies for use in technical schools.

5 years
Destroy

SCH162
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Federal Title IV Financial Aid--Administrative Files
PELL grant student payment summary; Federal PELL grant payment voucher; IPS batch report; Recipient data exchange summary report

5 years
Destroy

SCH163
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Federal Title IV Financial Aid--Student Files
SAR; ESAR; ISAR; Stafford Loan

Verification worksheet and documentation including 1040s, Social Security printouts, Family Services printouts, etc.; Acknowledgment of funds; Enrollment Agreement; Promissory note; Entrance interview acknowledgment; Exit interview acknowledgment; Financial aid transcript from other post-secondary schools (if other were attended); first year students who receive funds and leave before completing 60% of the program will have, in their file: Refund calculation worksheet; new perspectives intake form

5 years
Destroy

For students who receive funds but leave before 60% of the programs is completed--the 5 year clock begins after the second year or the 180 day follow-up

SCH164
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Minutes of Career-Technical Education Committee

2 years
Destroy

SCH166
Also Called:
Function:
Content:
Minimum Retention:
Disposition:
Note:
Approval Date:

Career-Technical Building Payment Certificates

Permanent and update
Archive
<table>
<thead>
<tr>
<th>Code</th>
<th>Title</th>
<th>Also Called</th>
<th>Function</th>
<th>Content</th>
<th>Minimum Retention</th>
<th>Disposition</th>
<th>Note</th>
<th>Approval Date</th>
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</thead>
<tbody>
<tr>
<td>SCH167</td>
<td>Area Career Center Tuition Charges</td>
<td></td>
<td></td>
<td></td>
<td>5 years</td>
<td>Destroy</td>
<td></td>
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<tr>
<td>SCH168</td>
<td>Application for Reimbursement from Career-Technical Funds</td>
<td></td>
<td></td>
<td>Reimbursement for salaries, travel and other allowable items</td>
<td>3 years (subject to federal regulations)</td>
<td>Destroy</td>
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<tr>
<td>SCH169</td>
<td>Enrollment Report for Career-Technical Program</td>
<td></td>
<td></td>
<td></td>
<td>3 years</td>
<td>Destroy</td>
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<tr>
<td>SCH170</td>
<td>Grade Report Sheets--Career Center</td>
<td></td>
<td></td>
<td></td>
<td>2 years</td>
<td>Destroy</td>
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<tr>
<td>SCH171</td>
<td>Record of Curriculum</td>
<td></td>
<td></td>
<td>Curriculum offered in Career-Technical education program/school</td>
<td>Retain until superseded</td>
<td>Destroy</td>
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<tr>
<td>SCH172</td>
<td>Technology Consortium Meetings</td>
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<td></td>
<td></td>
<td>5 years</td>
<td>Destroy</td>
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<tr>
<td>Alumni Lists, 27</td>
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