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- Superseded manuals and other directives (maintained outside the office of record).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](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.

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 its permanent records-in this case,
some of the records that it generates and receives. The records that have been identified as permanent require
special handling and storage if they are to be preserved. The continuous interaction between a 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.
By microfilming older, deteriorating, but permanently valuable records, local governments can generate durable
copies for research and prevent further damage or deterioration of the original. When filmed, processed, and
maintained to archival specifications, the master negative will ensure that permanently valuable records are
preserved for generations to come. 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. 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 Electronic Records
Permanent records existing solely in electronic form are in danger of becoming inaccessible through media decay
and hardware/software obsolescence. Periodic migration and transfer of permanent records to stable
preservation media, such as microfilm, should be considered as a best practice for local government to fulfill its
statutory responsibility to maintain permanent 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;
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.

Introduction
RetentionPolicy 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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Introduction
Public School Records Retention Schedule

See also the General Records Retention Schedule.

Administration

**SCH001**
Also Called: Annual Secretary of the Board of Education Report
Function: Financial record of the district's receipts and disbursements for the fiscal year
Content: Permanent
Retention: Archive
Note: Approval Date:

**SCH003**
Also Called: District Reorganization Records
Function: Verify appointment of new board members annually and included in board packet
Content: Oath of office, notice of election, election results, appointment of custodian of records and MSBA delegates
Retention: Permanent
Disposition: Archive
Note: See RSMO 162.152; 162.171; 162.181; 162.841
Approval Date:

**SCH004**
Also Called: Missouri School Improvement Program Report
Function: 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.
Content: Report includes academic achievement, subgroup achievement, college and career readiness, high school readiness, attendance rate, graduation rate
Retention: Permanent
Disposition: Archive
Note: Approval Date:

**SCH005**
Also Called: Post High School Status Reports
Function: Core data file that tracks student activity after graduation.
Content: Retain until superseded
Retention: Destroy
Disposition: Note: This is based on a template from DESE related to MSIP Standard 3 regarding college and career readiness.
Approval Date:
<table>
<thead>
<tr>
<th>SCH006</th>
<th>Written Curriculum Guide</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Documents curriculum used in the district, aligned with Missouri Learning Standards</td>
</tr>
<tr>
<td>Function:</td>
<td>Retain until superseded</td>
</tr>
<tr>
<td>Content:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Retention:</td>
<td></td>
</tr>
<tr>
<td>Disposition:</td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td></td>
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<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH007</th>
<th>School Improvement Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Comprehensive School Improvement Plan</td>
</tr>
<tr>
<td>Function:</td>
<td>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</td>
</tr>
<tr>
<td>Content:</td>
<td>Retain until superseded</td>
</tr>
<tr>
<td>Retention:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Disposition:</td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td>See RSMo 160.514; 162.1100</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH008</th>
<th>MSIP Supporting Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Data Files</td>
</tr>
<tr>
<td>Function:</td>
<td>Data collected to generate MSIP Annual Performance Report</td>
</tr>
<tr>
<td>Content:</td>
<td>Part of Core Data</td>
</tr>
<tr>
<td>Retention:</td>
<td>1 year after completion of cycle</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH010</th>
<th>Core Data--Source Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>General data collected by school district and reported 6 times per year to DESE Core Data Collection System</td>
</tr>
<tr>
<td>Function:</td>
<td>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</td>
</tr>
<tr>
<td>Content:</td>
<td>5 years or as otherwise indicated</td>
</tr>
<tr>
<td>Retention:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Disposition:</td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td>The Missouri Department of Elementary and Secondary Education (DESE) maintains an historical copy of data submitted electronically as part of the Core Data Collection System. Although district staff members are encouraged to maintain copies as appropriate for immediate local use, permanent copies of these data submitted by the district are maintained by DESE and are therefore not required to be maintained by local school districts</td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH011</th>
<th>Application for Summer School Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>District application to DESE to hold summer school</td>
</tr>
<tr>
<td>Function:</td>
<td>Includes: School district information, summer school director information, dates of summer school, program information, estimated enrollment, dates of operation, hours of operation, superintendent certification</td>
</tr>
<tr>
<td>Content:</td>
<td>5 Years</td>
</tr>
<tr>
<td>Retention:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Disposition:</td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td></td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>
SCH012  Multiple Consortium Co-ops Legal, Technical, Special Ed., Professional Development

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

5 Years  
Destroy  

SCH084  Statement of Intention to Employ a Minor

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

Certificate to Employ a Minor; Certificate of Age for Employment of Minors; Work Certificates

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.

May contain request to work, statement of intent to employ a student setting forth the nature of work, exact hours of the day, number of hours per day and days of the week; written consent of the parent, custodian or guardian; proof of age; certificate from school documenting grades; certificate from a physician stating that work will not injure the child's health or mental development

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.
Adult Education

SCH015
Also Called:
Function:
Content:
Retention: 5 Years
Disposition: Destroy
Note:
Approval Date:

Application to State for Reimbursement

SCH016
Also Called:
Function:
Content:
Retention: 5 Years
Disposition: Destroy
Note:
Approval Date:

Employment and Training Record of Students Follow-up
## 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>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>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>
</tbody>
</table>

<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>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

<table>
<thead>
<tr>
<th>SCH026</th>
<th>Assessed Valuation Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Letter from county certifying real and personal property valuation of district</td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>Permanent</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Archive</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
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<tr>
<td>Approval Date:</td>
<td></td>
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</tbody>
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<table>
<thead>
<tr>
<th>SCH027</th>
<th>Bound Book Generated by Bond Counsel</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>School Bonds, general obligation bonds, leasehold revenue bonds, quality school construction bonds, Build America bonds</td>
</tr>
<tr>
<td>Function:</td>
<td>Financial records documenting bond issues</td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>Maturity + 3 years</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
</tr>
<tr>
<td>Approval Date:</td>
<td>August 24, 2010</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH028</th>
<th>Sales Tax Exemption Letters</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Documents district's exemption from sales tax when making purchases</td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>Retain until superseded</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
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<tr>
<td>Approval Date:</td>
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<table>
<thead>
<tr>
<th>SCH029</th>
<th>Tax Exemption Certificate</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Tax ID letter confirming exempt status</td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>Retain until superseded</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
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<tr>
<td>Note:</td>
<td></td>
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<tr>
<td>Approval Date:</td>
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</tbody>
</table>

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

<table>
<thead>
<tr>
<th>SCH035</th>
<th>Certification of Property Tax Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Documents tax rates, generated by State Auditor and sent to County Clerk</td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>Completion of Audit</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td>This is a copy of a record kept by the County Clerk.</td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>
Federal Programs

**SCH036**
Also Called: 
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.

**SCH037**
Also Called: 
Title I
Records relating to federal programs for Educationally Deprived Children
3 years after program year
Destroy

**SCH038**
Also Called: 
Title II
3 years after program year
Destroy

**SCH039**
Also Called: 
Title II-D e-MINTS Grant (competitive)
5 years
Destroy

**SCH040**
Also Called: 
Title III
Records relating to federal programs for English language acquisition
3 years after program year
Destroy

**SCH041**
Also Called: 
Title IV
3 years after program year
Destroy
**SCH042**
*Title V*

Also Called:  
Function:  
Content:  
Retention: 3 years after program year  
Disposition: Destroy  
Note:  
Approval Date:  

**SCH043**
*Federal Discretionary Grant Programs*

Also Called:  
Function:  
Content:  
Retention: 3 years after program year  
Disposition: Destroy  
Note:  
Approval Date:  

**SCH044**
*Federal Impact-aid P.L. 815 & P.L. 874*

Also Called:  
Function:  
Content:  
Retention: 3 years after program year  
Disposition: Destroy  
Note:  
Approval Date:  

**SCH173**
*Medicaid Records/Payments*

Also Called:  
Function:  
Content:  
Retention: 3 years after program year  
Disposition: Destroy  
Note:  
Approval Date:  

Federal Programs
Food Services

SCH045
Also Called: Food Application Agreements
Function: 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

Content: 3 Years after fiscal year
Retention: Destroy
Note: See: 7 CFR 210 on USDA food assistance programs
Approval Date: Revised August 19, 2014

SCH177
Also Called: Food Service Records
Function: 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

Content: 3 years
Retention: Destroy
Note: *Food Management Company Schools Only; Replaces SCH046, 047, 048, 049, 050
Approval Date: August 20, 2013
Health Records

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

**Student Cumulative Health Record**

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

Revised August 28, 2012

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

**Immunization Records**

Immunization Record; Immunization Exemption; Medical Exemption; Religious  
Provides verification of immunizations received, or immunization exemptions (religious, medical or parental)  
3 years after leaving school, or graduating  
Destroy  

August 25, 2009; Revised August 28, 2012

**SCH053**  
Also Called:  
Function:  
Content:  
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  
Destroy  
Information is destroyed when immunization is complete  
August 25, 2009

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

**Emergency Contact Record**

Student Health Information; Student Emergency Information; Emergency Card  
May contain: student name, address, parent information, doctor's name, hospital preference, medical history.  
1 Year*  
Destroy  

*Maintain only current contact information.  
Revised August 19, 2014

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

**Health Care Plans**

Summary of the nursing plan of care for a student with special health needs  
1 year  
Destroy  
Evaluate annually--may be a part of the Individual Education Plan--IEP
**SCH062**  
**Also Called:**  
**Function:**  
**Content:**  
**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.

**SCH063**  
**Also Called:**  
**Function:**  
**Content:**  
**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.

**SCH174**  
**Also Called:**  
**Function:**  
**Content:**  
**Retention:**  
**Disposition:**  
**Note:**  

**Medical Treatments, Reports and Evaluations**  
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  
August 20, 2013; Updated August 25, 2015

**SCH175**  
**Also Called:**  
**Function:**  
**Content:**  
**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  
August 20, 2013

**SCH180**  
**Also Called:**  
**Function:**  
**Content:**  
**Retention:**  
**Disposition:**  
**Note:**  
**Approval Date:**  

**Student Physical Records**  
Annual physicals documenting fitness to participate in school sponsored extracurricular activities  
1 Year  
Destroy Securely  
Confidential Records  
August 25, 2015
<table>
<thead>
<tr>
<th><strong>SCH181</strong></th>
<th><strong>Student Drug/Alcohol Testing Records</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Also Called:</strong></td>
<td>Drug Screening Records</td>
</tr>
<tr>
<td><strong>Function:</strong></td>
<td>Documents the testing of students for controlled substances prohibited by policy, procedure or statute.</td>
</tr>
<tr>
<td><strong>Content:</strong></td>
<td>Records may include but are not limited to the documentation of test results, the collection process, the random sample process.</td>
</tr>
<tr>
<td><strong>Retention:</strong></td>
<td>Retain positive test results until student graduates or leaves district; retain negative test 1 Year</td>
</tr>
<tr>
<td><strong>Disposition:</strong></td>
<td>Destroy Securely</td>
</tr>
<tr>
<td><strong>Note:</strong></td>
<td>Confidential Records</td>
</tr>
<tr>
<td><strong>Approval Date:</strong></td>
<td>August 25, 2015</td>
</tr>
</tbody>
</table>
**Instruction**

### SCH069: District Test Assessments
- **Also Called:** District Test Scores
- **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:**
- **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: Textbook Inventory
- **Also Called:**
- **Function:** Inventory of textbooks for each school.
- **Content:**
- **Retention:** Retain until superseded
- **Disposition:** Destroy
- **Note:**

### SCH071: Teacher's grade book
- **Also Called:**
- **Function:**
- **Content:**
- **Retention:** 2 years
- **Disposition:** Destroy
- **Note:**

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

### SCH075: Teacher Plans, Programs, Recommendations
- **Also Called:**
- **Function:**
- **Content:**
- **Retention:** Destroy in Current Area
- **Disposition:** Destroy
- **Note:**
SCH178

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:
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.
Special Education

SCH087
Also Called: Annual Report of Exceptional Pupil Programs
Function:
Content:
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:
Content:
Retention: 3 years
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:
Content:
Retention: 3 years
Disposition: Destroy
Note: Revised August 20, 2013

SCH097
Also Called: Student Special Education Record
Function:
Content:
Retention: 3 Years from date of last service
Disposition: Destroy
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.
Approval Date: Revised August 19, 2014; Revised August 24, 2016
<table>
<thead>
<tr>
<th>SCH098</th>
<th>Individuals with Disabilities Education Act (IDEA)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Reports Documenting expenditures and proposed expenditures.</td>
</tr>
<tr>
<td>Function:</td>
<td>Final expense report, maintenance of effort, child count, amendment, budget grid, request for payment, payment grid</td>
</tr>
<tr>
<td>Content:</td>
<td>Subject to Federal Requirements</td>
</tr>
<tr>
<td>Retention:</td>
<td>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</td>
</tr>
<tr>
<td>Disposition:</td>
<td></td>
</tr>
<tr>
<td>Note:</td>
<td></td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH099</th>
<th>Local Compliance Plan and Monitoring Documentation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Documents the local school district's version of the state compliance plan</td>
</tr>
<tr>
<td>Function:</td>
<td>Retain until superseded</td>
</tr>
<tr>
<td>Content:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Retention:</td>
<td>Combined with SCH100</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Revised August 20, 2013</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>SCH179</th>
<th>Special Education--Pupil Test Protocols, Scores, Evaluations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td>Test Protocols</td>
</tr>
<tr>
<td>Function:</td>
<td>Documents Individualized Education Program (IEP) test protocols, scores, and evaluations</td>
</tr>
<tr>
<td>Content:</td>
<td>3 Years after last service</td>
</tr>
<tr>
<td>Retention:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Disposition:</td>
<td>This series combines former series entries SCH095 with SCH096.</td>
</tr>
<tr>
<td>Note:</td>
<td>August 20, 2013; Revised August 19, 2014</td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
<tr>
<td>SCH102</td>
<td>At Risk Student Programs</td>
</tr>
<tr>
<td>--------</td>
<td>-------------------------</td>
</tr>
<tr>
<td>Also Called:</td>
<td></td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>5 years</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
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<tr>
<td>Approval Date:</td>
<td></td>
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</table>

<table>
<thead>
<tr>
<th>SCH103</th>
<th>Career Ladder Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td></td>
</tr>
<tr>
<td>Function:</td>
<td>Documents teachers who achieve national board certification</td>
</tr>
<tr>
<td>Content:</td>
<td>List of certified teachers and letters confirming certification</td>
</tr>
<tr>
<td>Retention:</td>
<td>5 years</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
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<tr>
<td>Approval Date:</td>
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<table>
<thead>
<tr>
<th>SCH104</th>
<th>Child Care Development Fund Grant (Block Grant)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td></td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>5 years</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH105</th>
<th>Drop Out Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td></td>
</tr>
<tr>
<td>Function:</td>
<td>Documents Student drop-outs</td>
</tr>
<tr>
<td>Content:</td>
<td>Monthly report submitted to DESE.</td>
</tr>
<tr>
<td>Retention:</td>
<td>5 years</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td>Kept as part of Core Data</td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH106</th>
<th>Minimum Salary Supplement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td></td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td></td>
</tr>
<tr>
<td>Retention:</td>
<td>5 years</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td></td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SCH107</th>
<th>Parents as Teacher Project Records</th>
</tr>
</thead>
<tbody>
<tr>
<td>Also Called:</td>
<td></td>
</tr>
<tr>
<td>Function:</td>
<td></td>
</tr>
<tr>
<td>Content:</td>
<td>Documents district's participation in the Parents as Teachers Program May include: home visits, child screening, high needs characteristics, and data collection</td>
</tr>
<tr>
<td>Retention:</td>
<td>5 years</td>
</tr>
<tr>
<td>Disposition:</td>
<td>Destroy</td>
</tr>
<tr>
<td>Note:</td>
<td>Generated and submitted on a DESE form, used for program funding.</td>
</tr>
<tr>
<td>Approval Date:</td>
<td></td>
</tr>
</tbody>
</table>
**SCH108 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.

- **Retention:** 5 years
- **Disposition:** Destroy

**SCH109 Professional Development Committee Records**

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

- **Content:** Agendas, minutes, budget, by-laws, reports of professional development.
- **Retention:** 5 years
- **Disposition:** Destroy

**SCH110 Teacher Education Scholarships**

5 years

- **Retention:** 5 years
- **Disposition:** Destroy

**SCH111 School Board Member Training Records**

Documents training of school board members

- **Content:** May include: hours of training, date, name of class, and certificate.
- **Retention:** Duration of service
- **Disposition:** Destroy

**SCH112 State Gifted Records**

Documents district's gifted program, participation and requirements

- **Content:** May include: testing protocols, test results, evaluation forms
- **Retention:** 5 years
- **Disposition:** Destroy
- **Note:** May be kept as part of student record.

**SCH113 State Grants**

Health; A+ Schools; Vocational Enhancement; etc.

- **Retention:** 5 years
- **Disposition:** Destroy
**SCH114**

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

**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:*  

**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:*  

**Retention:**  
**Disposition:**  
**Note:**  
**Approval Date:**

---

**Tuition Reimbursement**

5 years  
Destroy
# Student Activities

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

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

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

**SCH131**  
**School Club and Organization By-laws**  
Also Called:  
Function:  
Content: Documents organizations that operate under the school's auspices  
Retention: May include: by-laws, affidavits, re-authorizations, proposed budgets, officer lists, etc.  
Disposition: Destroy in Current Area  
Note: Destroy  
Approval Date:
**Student Records**

**SCH132**  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:

**Student Cumulative Record--Transcripts**

May include: Grades; birth record; gpa; class rank; college prep certificates; standardized test scores  
75 Years  
Destroy  
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  
August 25, 2009; Revised August 20, 2013; Revised August 19, 2014

**SCH133**  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:

**Student Cumulative Record--Other**

Any non-transcript material as defined in SCH132  
5 years after graduation or leaving school  
Destroy  
Includes Nonresident Student Information, formerly part of SCH137  
August 25, 2009; Revised August 20, 2013

**SCH138**  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:

**Records of Serious Discipline Violations**  
Committee on Conduct Records  
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  
Until student reaches age 23  
Destroy  
See RSMo 167.020 subsection 7 and 160.261 subsection 9

**SCH139**  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:

**Student Accident Insurance Information**

Documents accident insurance that is available for parent purchase  
May include: fliers for program, rate information, etc.  
Destroy in Current Area  
Destroy

**SCH140**  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:

**New Student Orientation Schedules**

Destroy in Current Area  
Destroy  
Revised August 19, 2014
SCH141  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:  

School Publications Information  
- Destroy in Current Area  
- Destroy

SCH142  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:  

Class Meeting Minutes  
- Destroy in Current Area  
- Destroy

SCH143  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:  

Class Rosters  
- Destroy in Current Area  
- Destroy

SCH144  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:  

Current Class Schedule of District  
- Master schedule of all classes in all schools in the district  
- May include: school, class, teacher name, student names, student IDs  
- Destroy in Current Area  
- Destroy

SCH145  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:  

Deficiency Report  
- Destroy in Current Area  
- Destroy

SCH146  
Also Called:  
Function:  
Content:  
Retention:  
Disposition:  
Note:  
Approval Date:  

Graduation Records  
- Commencement Records; End of Year Activity Arrangements  
- 1 year  
- Destroy

Student Records
**SCH147**

**Graduation Records**—A+ student records

- **Retention:** 10 Years
- **Disposition:** Destroy
- **Note:** Revised, August 20 2013

**SCH148**

**Honor Roll Lists**

- **Retention:** 1 year
- **Disposition:** Destroy

**SCH149**

**Student Awards**

- **Retention:** 1 year
- **Disposition:** Destroy

**SCH150**

**Letter Grade Distribution by Class**

- **Retention:** Destroy in Current Area
- **Disposition:** Destroy

**SCH151**

**Student Directory**

- **Retention:** Destroy in Current Area
- **Disposition:** Destroy

**SCH176**

**Student Registration Records**

- **Retention:** 10 Years after leaving school
- **Disposition:** Destroy
- **Note:** These records are distinct from the student cumulative record and should be maintained as a separate file. This series replaces SCH134, 135, 136.

- **Approval Date:** 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
Retention: 3 years
Disposition: Destroy

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
Retention: 3 years
Disposition: Destroy

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

Career Education

SCH159
Also Called: Reimbursement for salaries for Career Education Programs
Function: 5 years
Disposition: Destroy

SCH160
Also Called: Application for Authorization to Purchase Equipment/Supplies
Function: 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
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:
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:
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:
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:
Retention:
Disposition:
Note:
Approval Date:

Minutes of Career-Technical Education Committee

2 years
Destroy

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

Career-Technical Building Payment Certificates

Permanent and update
Archive
<table>
<thead>
<tr>
<th>SCH167</th>
<th>Area Career Center Tuition Charges</th>
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<tbody>
<tr>
<td>Also Called:</td>
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<tr>
<td>Function:</td>
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<tr>
<td>Content:</td>
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<td>Retention:</td>
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<td>Disposition:</td>
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<table>
<thead>
<tr>
<th>SCH168</th>
<th>Application for Reimbursement from Career-Technical Funds</th>
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<tr>
<td>Function:</td>
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<tr>
<td>Content:</td>
<td>Reimbursement for salaries, travel and other allowable items</td>
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<tr>
<td>Retention:</td>
<td>3 years (subject to federal regulations)</td>
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<tr>
<th>SCH169</th>
<th>Enrollment Report for Career-Technical Program</th>
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<td>Retention:</td>
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<tr>
<th>SCH170</th>
<th>Grade Report Sheets--Career Center</th>
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<tr>
<td>Content:</td>
<td>Curriculum offered in Career-Technical education program/school</td>
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<td>Retention:</td>
<td>Retain until superseded</td>
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<th>Technology Consortium Meetings</th>
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