

## Records and Data Management

### Employee Responsibilities

1. Employees will evaluate the content and purpose of each record to determine which retention schedule requirement defines the record’s required retention period.
2. It is recommended that employees retain only the final message in a communication string that documents the contents of all previous communications. This is preferable to retaining each individual message, containing duplicate content.
3. Employees shall retain records, e.g., documents or email that have not fulfilled the legally-mandated retention period.
4. Employees will organize their records so they can be located and used.
5. Employees will promptly dispose of transitory, non-public record and personal records from the network and email system.
6. Employees are responsible for ensuring that records that are public records are properly archived prior to any district system auto clean-up schedules.

The District shall use the following Retention schedule published by the State Archivist in Oregon Administrative Rule (OAR) Chapter 166.

Administrative Records .....	<a href="#">166-400-0010</a>
Activity and Room Scheduling	
Activity Reports, General	
Annual Reports	
Association and Organization Membership	
Audit Records, Internal	
Bond Election	
Calendars and Scheduling	
Child Care Facility License	
Committee and Board Meetings	
Committee and Board Member	
Conference and Workshop	
Contracts and Agreements	
Correspondence	
Eighth Grade Examination	
Fax Reports	
Food/Nutrition Service Program	
Health Log Book	
Immunization Records, Administrative	
Legal Case	
Legal Opinion and Advice	
Legislative Tracking	
Lobbyist	

- Mitigation Program
- Notary Public Log Books
- Oregon School Register
- Organization
- Parent-Teacher Organization
- Policy and Planning
- Policy Statements and Directives
- Procedure Manuals
- Professional Membership
- Public Notice
- Reports and Studies
- Requests and Complaints
- Routing and Job Control
- School Census
- School, District or ESD History
- Special Education Census
- Special Event and Celebration
- Staff Meeting
- Standardization
- Student Information and Demographic
- Student Organization Administrative
- Superintendent of Schools
- Surveys, Polls and Questionnaires
- Test Administration
- Work Order
- Work Schedule and Assignment
- Year 2000 (Y2K) Planning
- Curriculum and Instruction Records..... [166-400-0015](#)
  - Course Descriptions
  - Curriculum Development Records
  - Instructional Materials Selection and Adoption Records
  - Talented and Gifted Program (TAG) Records
  - Teacher Daily Instructional Plans
- Financial Records ..... [166-400-0025](#)
  - Accounts Payable Records
  - Accounts Receivable Records
  - Audit Reports
  - Bank Transaction Records
  - Bond Records
  - Budget Preparation Records
  - Budget Records
  - Check Conversion Records
  - Competitive Bid Records
  - Credit and Debit Receipts
  - Credit Slips
  - Employee Bond Records
  - Financial Reports
  - General Ledgers
  - Gift and Contribution Records
  - Grant Records
  - Investment Records
  - Lease Records
  - Petty Cash Fund Records

- Purchasing Records
- Revenue Records
- Signature Authorization Records
- Student Organization Financial Records
- Subsidiary Ledgers, Journals, and Registers
- Travel Expense Records
- Unclaimed Property Report Records
- Vendor Records
- Information and Records Management Records..... [166-400-0030](#)
  - Computer System Maintenance Records
  - Computer System Program Documentation
  - Computer System Security Records
  - Computer System Wiring Records
  - Federal Communications Commission (FCC) License Records
  - Filing System Records
  - Forms Development Records
  - Information Service Subscription Records
  - Information System Planning and Development Records
  - Microfilm and Image Quality Control Records
  - Public Records Disclosure Request Records
  - Records Management Records
  - Software Management Records
  - Telecommunications System Management Records
  - User Support Records
- Library and Media Records ..... [166-400-0035](#)
  - Acquisition and Deaccession Records
  - Audio-Visual Materials and Equipment Loan Records
  - Circulation Records
  - Copyright and Duplication Records
  - Library and Media Inventory Records
  - Library Catalog Records
  - Supplemental Materials Selection and Adoption Records
- Payroll Records ..... [166-400-0045](#)
  - Deduction Authorization Records
  - Deduction Registers
  - Employee Payroll Records
  - Employee Time and Attendance Records
  - Federal and State Tax Records
  - Garnishment Records
  - Leave Applications
  - Leave Balance Reports
  - Payroll Administrative Reports
  - Payroll Registers
  - Unemployment Compensation Claim Records
  - Unemployment Reports
  - Wage and Tax Statements
  - Withholding Allowance Certificates
- Personnel Records ..... [166-400-0050](#)
  - Affirmative Action Records
  - Benefits Continuation Records
  - Collective Bargaining Records
  - Comparable Worth Study Records
  - Compensation Plan Records

- Criminal Background Check Records
- Disciplinary Action Records
- Drug Testing Records
- Employee Benefits Records
- Employee Medical Records
- Employee Personnel Records
- Employee Recognition Records
- Employee Suggestion Award Records
- Employment Eligibility Verification Forms (I-9)
- Equal Employment Opportunity Commission Compliance Records
- Grievance Records
- Hazard Exposure Records
- Layoff, Dismissal, and Non-Renewal Records
- Personnel Research Records
- Photo Identification Records
- Position Description and Classification Records
- Recruitment and Selection Records
- Teacher Registration and Licensure (Certification) Records
- Training Program Records
- Volunteer Program Records
- Wellness Program Records
- Property and Equipment Records ..... [166-400-0020](#)
  - Architectural Drawings, Blueprints, and Maps
  - Asbestos Management Records
  - Building and Grounds Repair, Remodeling, and Construction Records
  - Capital Construction Project Records
  - Damaged/Stolen Property Records
  - Equipment Loan Records
  - Equipment Records
  - Facility Use Records
  - Hazardous Materials Management Records
  - Inventory Records
  - Property Disposition Records
  - Property Records
  - Underground Storage Tank Management Records
  - Utilities Systems Operating and Maintenance Records
  - Work Orders
- Safety and Risk Management Records ..... [166-400-0055](#)
  - Accident and Injury Reports
  - Accident Insurance Fund Claim Records
  - Contractor Liability Insurance Verification Records
  - Contractor Performance Bond Records
  - Disaster Preparedness Plan Records
  - Emergency Response and Safety Plans and Procedures
  - Hazard Communications Program Records
  - Hazardous Substance Employer Survey Records
  - Insurance Claim Records
  - Insurance Policy Records
  - Liability Claims Records
  - Liability Waivers
  - Master Material Safety Data Records
  - Occupational Injury and Illness Records
  - Property Damage Records

- Risk Factor Evaluation Records
- Safety Committee Records
- Safety Inspection and Compliance Records
- Tort Liability Claim Records
- Vehicle Accident Records
- Workers' Compensation Claim Records
- Workers' Compensation Reports
- School Administration Records..... [166-400-0040](#)
  - Communication Logs
  - District Boundary Records
  - District Clerk's Records
  - Interscholastic Athletic Activity Program Records
  - Key and Keycard Records
  - Mailing Lists
  - Parking Records
  - Postal Records
  - Press Releases
  - Publications
  - Scheduling Records
  - Security Records
  - Student Handbooks
  - Visitor Logs
- Student Education Records..... [166-400-0060](#)
  - Alternative School Referral Records
  - Attendance Records
  - Behavioral Records, Major (Class/Group A)
  - Behavioral Records, Minor (Class/Group B)
  - Certificate of Advanced Mastery (CAM) Records
  - Certificate of Initial Mastery (CIM) Records
  - Child Abuse Reports
  - Child Care Facility Residency Records
  - Compensatory Education Programs Student Records
  - Compulsory Attendance Excuse Records
  - Education Counseling Records
  - Educational Programs Student Records
  - Grade Records
  - Grade Reports, Administrative
  - Grievance Records
  - High School Dual Program Student Records
  - Home Schooling Records
  - Inter-District Transfer Agreement Records
  - Intervention Programs Student Records
  - Non-Resident Student Records
  - Oregon Student Record
  - Parental/Custodial Delegation Records
  - Parent-Teacher Conference Records
  - Personal/Locker Search Records
  - Psychological Guidance and Counseling Records
  - Registration Records
  - Report Cards
  - Special Education Student Records
  - Student Athletic Activity Records
  - Student Health Records

- Student Health Screening Records
- Student Immunization Records
- Transfer Application Records
- Truancy Records
- Tutoring Records
- Withdrawal Records
- Transportation Records..... [166-400-0065](tel:166-400-0065)
- Bus Driver Records
- Bus Incident and Vandalism Reports
- Bus Schedule and Route Records
- Bus Service Records
- Fuel Records
- Transportation Complaint Reports
- Transportation Safety Records
- Vehicle Maintenance Records
- Vehicle Records
- Vehicle Usage Records]