

**GENERAL RETENTION SCHEDULE #2
MICHIGAN PUBLIC SCHOOLS
APPROVED APRIL 11, 2023**

This General Retention and Disposal Schedule covers records commonly maintained by public and charter schools, school districts, and intermediate school districts. This schedule supersedes the schedule that was approved on December 7, 2010. The records that are described on the attached pages are deemed necessary (1) for the continued effective operation of Michigan government, (2) to constitute an adequate and proper recording of its activities, and (3) to protect the legal rights of the government of the State of Michigan and of the people. This schedule meets the administrative, legal, fiscal and archival requirements of the State of Michigan.

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
General Administrative	0100-	Subject Files	These records document various topics, issues, projects, or activities that an agency or employee is involved in. They may include, but may not be limited to, topical reference files about issues, strategic planning files for the agency or specific initiatives, special project files (including final reports), budget documents, audit documents, and development files for policies, press releases, publications, and forms. Document types may include topical correspondence, memoranda, reports, research, articles, meeting notes, and related background materials.	RETAIN UNTIL: Topical file is no longer of interest for ongoing administration PLUS: 1 year THEN: Destroy	4/11/2023
General Administrative	0101-	Correspondence Files - General	These records document correspondence received or sent that is not pertinent to an active project, matter, or case being handled by the agency. They may include, but may not be limited to, requests for information that do require administrative action, a policy decision, special compilation of research, analysis, or referral correspondence. This series also includes correspondence indexing and tracking tools.	RETAIN UNTIL: Date created PLUS: 1 year THEN: Destroy	4/11/2023
General Administrative	0102-	Transitory Records	These records document agency activities that have temporary value and do not need to be retained once their intended purpose has been fulfilled. They may include, but may not be limited to, routine requests for information that require no: administrative action, policy decision, special compilation of research; requests or matters that are addressed by creating other records; and reminders.	RETAIN UNTIL: Activity is completed THEN: Destroy	4/11/2023
General Administrative	0103-	Meeting Records - Internal Agency Staff and Committees	These records document meetings that are internal to a school district, between district employees and parents, and between multiple districts. They may include, but may not be limited to, meeting minutes, agendas, recordings, and distribution materials. This series does not apply to meetings of the school board and its subcommittees (see item #200).	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	4/11/2023
General Administrative	0104-	Planners and Calendars	These records document an individual employee's work-related meetings, assignments, and tasks. They may include, but may not be limited to, appointments, meetings, calendars, and planners.	RETAIN UNTIL: Event date PLUS: 2 years THEN: Destroy	4/11/2023
General Administrative	0105-	Freedom of Information Act (FOIA) Request Records	These records document requests for information and public records maintained by state agencies. They may include requests for information, correspondence, a copy of the information released, and billing documentation. [MCL 15.233(2)]	RETAIN UNTIL: Response is sent, or request is denied PLUS: 1 year THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
General Administrative	0106-	Budget Planning Records	These records document each department's forecast of the need for new facilities, equipment, supplies, staff, programs, etc. They may include, but may not be limited to, budget requests, and statistics	RETAIN UNTIL: No longer needed to administer the budget for the current fiscal year, and to prepare future budget requests THEN: Destroy	4/11/2023
General Administrative	0107-	Grant Files	These records document the administration of grants that are applied for by the school district from state, federal and private agencies. Examples of grants include the Consolidated Application for Federal Funding (Title I, II, III, V), Section 31A grants from the Michigan Department of Education, Safe and Drug Free Schools grants from the ISD, Homeland Security, Michigan School Readiness, and Gates Foundation grants. They may include, but may not be limited to, applications, budgets, worksheets, adjustments, plans, rules and regulations, award letters, committee records, staffing sheets with account numbers, grant evaluation and monitoring reports, audits, and periodic progress reports.	RETAIN UNTIL: Grant is closed out, plus any additional time that is required by the granting agency for auditing purposes THEN: Destroy	4/11/2023
General Administrative	0108-	Publications	These records may include press releases, brochures, newsletters, and other items that are published by the school district to distribute information about upcoming events, accomplishments, services offered, etc.	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023
General Administrative	0109-	Policies, Procedures, and Directives	These records document school district policies, procedures, etc. (including those approved by the school board).	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Superintendent and Board of Education	0200-	Board of Education Meeting Records - Open Sessions	These records document the proceedings of the school district's Board of Education and any subcommittees or advisory committees to the board. They may include, but may not be limited to, approved minutes and agenda packets containing any materials that are distributed to board members for review (such as budgets, district calendars, policies, contracts, election resolutions, etc.).	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023
Superintendent and Board of Education	0200A-	Board of Education Meeting Records – Audio and/or Video Recordings	These records document the proceedings of the school district's Board of Education and any subcommittees or advisory committees to the board. They may include, but may not be limited to, audio and/or video recordings of the meeting.	RETAIN UNTIL: Minutes are approved THEN: Destroy	4/11/2023
Superintendent and Board of Education	0201-	Board of Education Meeting Records - Closed Session	These records document the official activities of the district's Board of Education. They may include, but may not be limited to, approved meeting minutes, agendas, audio and video recordings, and other supporting documentation related to closed meeting sessions only. [MCL 15.267(2)]	RETAIN UNTIL: Approval of the minutes of the regular meeting at which the closed session was held PLUS: 1 year, and 1 day THEN: Destroy	4/11/2023
Superintendent and Board of Education	0202-	Notices of a Public Meeting	These records document the posting of notices that a public meeting will be held in compliance with the Open Meetings Act (MCL 15.265). They may include, but may not be limited to, posted notices of any meeting, including annual schedules and special meetings.	RETAIN UNTIL: Meeting is held or cancelled PLUS: 1 year THEN: Destroy	4/11/2023
Superintendent and Board of Education	0203-	Board Member Files	These records document people who served on the district's Board of Education. They may include, but may not be limited to, petitions, conference and training requests, and correspondence.	RETAIN UNTIL: Individual is no longer serving as a member of the board THEN: Destroy	4/11/2023
Superintendent and Board of Education	0204-	Board Candidate Records	These records document people who ran for vacant school board seats. They may include, but may not be limited to, affidavit of identity, petition sheets, correspondence, election certificate, and receipts for the nominating petition.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	4/11/2023
Superintendent and Board of Education	0205-	Millage Files	These records document millage proposals. They may include, but may not be limited to, presentations, research, budgetary documents, ballot language, attorney opinions, and board resolutions.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	4/11/2023
Superintendent and Board of Education	0206-	Election Results (obsolete)	These records document the final vote count for each school election and include the Board of Canvassers certification.	These records are covered by GS 23.213.	4/11/2023
Superintendent and Board of Education	0207-	Election Returns (obsolete)	These records document voting activity during a school district election. They may include, but may not be limited to, poll lists, statements, tally sheets, absent voters' applications, absent voters' return envelopes, absent voters' records, and other returns made by inspectors of the precincts. (MCL 168.811).	These records are covered by GS 23.223, 23.233, 23.234.	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Superintendent and Board of Education	0208-	Election Ballots (obsolete)	These records document the votes that were cast during a school district election. They may include, but may not be limited to, ballots, seals, ballot tags, ballot labels from voting machines, and ballot pages from punch card devices.	These records are covered by GS 23.205.	4/11/2023
Superintendent and Board of Education	0209-	Election Notice Records (obsolete)	These records document notices that a school district election will be held. They may include, but may not be limited to, notices of the last day of registration, and notices of election.	These records are covered by GS 23.218.	4/11/2023
Superintendent and Board of Education	0210-	Property Transfer Records	These records document when land is added and removed from a school district's boundaries. They may include, but may not be limited to, boundary change forms, correspondence, decisions, appeals, hearing schedules, legal descriptions of the property, and maps.	RETAIN UNTIL: Date created PLUS: 50 years THEN: Destroy	4/11/2023
Superintendent and Board of Education	0211-	District Boundary Maps	These records document school district and ISD boundaries and plats. They are used to identify boundary corrections.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023
Superintendent and Board of Education	0212-	Reorganization, Consolidation or Annexation Records	These records document the reorganization, consolidation, or annexation of a school district. They may include, but may not be limited to, copies of board resolutions, election results, maps, correspondence, and supporting documentation.	RETAIN UNTIL: Date created PLUS: 50 years THEN: Destroy	4/11/2023
Superintendent and Board of Education	0213-	Annual Report Records	These records document Annual Education Improvement Plans and Progress Reports that are published by each school district in accordance with the provisions of Public Act 25 of 1990, federal No Child Left Behind legislation, and MCL 388.1619 .	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023
Superintendent and Board of Education	0214-	Security Access Records	These records document school district personnel who are authorized to access the Michigan Education Information System (MEIS) and other computer systems operated by the State of Michigan to submit and access information about the school district.	RETAIN UNTIL: Authorization is revoked THEN: Destroy	4/11/2023
Superintendent and Board of Education	0215-	Speech Files	These records document official presentations conducted by the Superintendent. They may include, but may not be limited to, electronic presentations, speaker notes, and formal papers.	RETAIN UNTIL: No longer of use for preparing future presentations, or for documenting significant events THEN: Destroy	4/11/2023
Superintendent and Board of Education	0216-	Superintendent's Building Reference Files	These records document issues, activities and events taking place at each building in the school district. They may include staff information, project records, and correspondence.	RETAIN UNTIL: No longer of use for reference to the Superintendent THEN: Destroy	4/11/2023
Superintendent and Board of Education	0217-	Graphic Design Records	These records document the production of publications and may log each project that is worked on.	RETAIN UNTIL: No longer needed to produce current and future publications THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Superintendent and Board of Education	0218-	Special Event and Activity Records	These records document events and activities of the school district. They may include, but may not be limited to, photographs, news clippings, certificates, awards.	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023
Superintendent and Board of Education	0219-	Third Party Subpoenas	These records document subpoenas or other court orders that an agency responds to when it is not a party to the litigation but is required to produce records. They may include, but may not be limited to, subpoenas, orders, correspondence, copies of the produced records, and documentation of redactions for production.	RETAIN UNTIL: Requested records are produced PLUS: 1 year THEN: Destroy	4/11/2023
Superintendent and Board of Education	0220-	School District Governance Records	These records document the establishment and governance of the school district. They may include, but may not be limited to, bylaws, charters, and articles of incorporation.	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Business Office	0300-	Insurance Policy Files	These records document insurance policies that provide coverage for property and casualty, workers compensation, errors and omission, fleet, general liability, umbrella, etc.	RETAIN UNTIL: Expiration date PLUS: 30 years THEN: Destroy	4/11/2023
Business Office	0301-	Insurance Claim Files	These records document claims that are submitted to an insurance provider. They may include, but may not be limited to, claim forms, correspondence, and supporting documents for each claim that is submitted.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0302A-	Accident Reports and Claim Files - Adults	These records document accident reports for personal injuries, property damage claims, and other incidents provide details about any unexpected incidents on school premises or property. The reports may list the location of the accident, description of the accident, first aid administration, witnesses, person injured, type of injury or property damage, actions taken, recommendations to prevent reoccurrence, etc. They may include, but may not be limited to, reports, witness statements, medical information, legal counsel, and subsequent claims.	RETAIN UNTIL: Date created PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0302B-	Accident Reports and Claim Files - Minors	These records document accident reports for personal injuries, property damage claims, and other incidents provide details about any unexpected incidents on school premises or property. The reports may list the location of the accident, description of the accident, first aid administration, witnesses, person injured, type of injury or property damage, actions taken, recommendations to prevent reoccurrence, etc. They may include, but may not be limited to, reports, witness statements, medical information, legal counsel, and subsequent claims.	RETAIN UNTIL: Minor turns 18 years old PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0303-	Bid and Quote Files	These records document bids that are received from vendors for products and services that the school district needs for construction, furnishings, grounds maintenance, trash and snow removal, cleaning services, food, transportation, etc. They may include, but may not be limited to, Invitations to Bid, bid documents that are submitted, and reviewer documentation.	RETAIN UNTIL: Bid is awarded PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0304-	Contract Files	These records document contracts that cover a variety of products and services including construction, custodial work, copiers, facility rental, Internet providers, maintenance, wiring, telephone services, employment, land, etc. They may include, but may not be limited to, contracts, correspondence with the vendor, warranties, and copies of purchase orders.	RETAIN UNTIL: Expiration date PLUS: 6 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Business Office	0305-	Litigation Files	These records document any litigation to which the school district is a party. They may include, but may not be limited to, depositions, transcripts, decisions, correspondence, data, exhibits, research materials, reports, press releases, and media clippings.	RETAIN UNTIL: Case is closed PLUS: 5 years THEN: Destroy	4/11/2023
Business Office	0306-	Tax Levy Certification and Reconciliation Files	These records document the amount of taxes that will be collected, based upon the millage rate and the taxable value. They may include, but may not be limited to, L-4029 Tax Levy Certification forms, and supporting documentation.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0307-	Real Property Records	These records document all buildings and property owned by the school district. They may include, but may not be limited to, deeds, easements, surveys, abstracts, appraisals, scope documents projecting work to be done, and as built construction plans.	RETAIN UNTIL: Property is no longer owned by the district THEN: Destroy	4/11/2023
Business Office	0308-	Budget Files	These records document the annual budget development process. They may include, but may not be limited to, adopted appropriations for each account or line item, amendments, funding requests, and "truth in taxation" documents.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Business Office	0309-	Accounting Transaction Detail Data	These records document all revenue, expenditures and balance sheets that are recorded in various accounts maintained by the school district.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0310-	Chart of Account Data	These records document the accounting codes that are used in the accounting transaction detail (see item #309).	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0311-	Receivable Files	These records document funds that are received, including the billing for services (such as enrollment payments, facility use, printing, recreation activities, before and after school programs, transportation, etc.). They may include, but may not be limited to, invoices that are sent to departments or groups, supporting documentation, agreements, gift and donation forms, and ledgers.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0312-	Receipt Records	These records document deposits into various accounts. They may include, but may not be limited to, cash receipt lists, and receipt registers. Information in these records may include the check number, date, receipt number, description, amount deposited, batch number, account number, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0313-	Gate Receipt Records	These records document the amount of money that is collected at each athletic event for admission. They may include, but may not be limited to, date, time, event, competition level, number of adult tickets sold, number of child tickets sold, and event expenses (ticket takers, clock operators, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Business Office	0314-	Journal Entry Records	These records document transfers between accounts, such as expenses not included in accounts payable, and revenues not in cash receipts. Transaction balance reports may identify the account number, account description, transaction amount, date, journal entry number, transaction description, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0315-	Budget Summary and Balance Sheet Records	These records document the status of budgetary activity on each account. They may include, but may not be limited to, account balances per month and year to date, and activity within the month on each account.	RETAIN UNTIL: No longer needed to verify the status of financial accounts THEN: Destroy	4/11/2023
Business Office	0316-	Payment Records	These records document the payment for goods and services. They may include, but may not be limited to, purchase orders, packing slips, requisitions, and invoices.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0317-	Telephone and Communications Bill Records	These records document bills that are received from the telephone and other communications service providers and may be used to generate bills that are distributed to each department in the school district. These bills may cover services for telephones, cellular phones, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0318-	Bank Activity Records	These records document activity on the school district's bank account. They may include, but may not be limited to, deposit slips, reconciliations, cancelled checks, bank statements, and electronic funds transfer transactions.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0319-	State Cost and Expenditure Reporting Records	These records document reports submitted by school districts to State of Michigan agencies including the Department of Education (MDE), the Center for Educational Performance and Information (CEPI), the Department of Licensing and Regulatory Affairs (LARA), etc. These reports may document school finances, special education, grant expenditures, career and technical education, personnel, buildings, transportation, etc.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0320A-	Act 18 Fund Records - Estimates	These records document estimates developed by ISDs for the distribution of Act 18 special education funds.	RETAIN UNTIL: Final report is approved THEN: Destroy	4/11/2023
Business Office	0320B-	Act 18 Fund Records - Final Report	These records document the final amount of money that is distributed each year by ISDs for Act 18 special education funds.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Business Office	0321-	Medicaid Records	These records document reimbursements to school districts by Medicaid for providing eligible services to special education and other students. These records may include, but may not be limited to, documentation required by the Michigan Department of Health and Human Services' Medicaid Provider Manual, reimbursement claims, doctors' prescriptions and referrals, provider reports, outreach documents, audit documents, and referral service reports.	RETAIN UNTIL: Quarterly Medicaid claim is submitted PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0322-	Investment Records	These records document investments made by the school district. They may include, but may not be limited to, statements from investment accounts that identify the date and amount of each transaction, the maturity and balance of the account, as well as cash flow and reconcile statements that summarize the beginning and ending balance of the account and all transactions dates and amounts.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0323-	Municipal Finance and Borrowing Records	These records document bonds for capital and construction projects, including school aid notes, School Bond Loan Fund, etc. They may include, but may not be limited to, transcripts of bond proceedings, and supporting documentation.	RETAIN UNTIL: Expiration of the bond or note PLUS: 7 years THEN: Destroy	4/11/2023
Business Office	0324-	Final Affidavit of Payment Records	These records document that all funds that were borrowed by the school district were paid back in full.	Permanent	4/11/2023
Business Office	0325-	Bond Cremation Records	These records document the cremation or disintegration of bonds or interest coupons upon maturity in compliance with the Bond Cremation Act (PA 56 of 1962). They may include, but may not be limited to, certificates documenting the destruction of the records.	Permanent	4/11/2023
Business Office	0326-	Supply Inventory Records	These records document the volume of supplies (office, school, maintenance, etc.) that are purchased and used.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Business Office	0327-	Fixed Asset Inventory Data	These records document all major property and its book value. School district policy determines the value at which property must be included on an inventory. The value of these items is then distributed across the useful life of the property. Data may include, but may not be limited to, a description of the item, value, date purchased, depreciation amount, insurable value, and building location.	RETAIN UNTIL: Annual report for the fiscal year in which the item was disposed is audited THEN: Destroy	4/11/2023
Business Office	0328-	Fixed Asset Annual Report Records	These records document annual reporting requirements for financial statements prepared by state and local governments in compliance with Government Accounting Standards Board (GASB) Statement 34. They may include, but may not be limited to, annual reports produced from the fixed asset inventory.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Business Office	0329-	Audit Records - Supporting Documents	These records document audits of school finances that are conducted annually by an independent certified public accounting firm. They may include, but may not be limited to, work papers, schedules, and reconciliations.	RETAIN UNTIL: Final report is issued [see OMB Circular A-133.320 (g)] PLUS: 3 years THEN: Destroy	4/11/2023
Business Office	0330-	Audit Records - Final Reports	These records document final reports submitted by auditors.	RETAIN UNTIL: School district is dissolved THEN: Destroy	4/11/2023
Business Office	0331-	Indirect Cost Records	These records document annual determinations of the allowable indirect cost rate that the district may charge to various state and federal grants. The actual indirect cost rates are determined and approved by the Michigan Department of Education.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Personnel	0400A-	Personnel Files and Data (supersedes item #401)	These records document each employee of the school district. They may include, but may not be limited to, employee data, Michigan New Hire forms, resumes, teaching certificates, assignment letters, continuing education, clippings, correspondence, service record change forms, attendance, evaluations, applications, tenure evaluations, investigations, testing, training, blood borne pathogen training, transcripts, contracts, disciplinary records, layoff notices, recall notices, certifications for CPR and first aid, bus driver certifications, current driver's licenses, driving records, and police accident reports.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 6 years THEN: Destroy	4/11/2023
Personnel	0400B-	Personnel Files and Data - Employees Cited for Unprofessional Conduct (supersedes item #401)	These records document employee of the school district who were cited for unprofessional conduct (MCL 380.1230b). They may include, but may not be limited to, employee data, Michigan New Hire forms, resumes, teaching certificates, assignment letters, continuing education, clippings, correspondence, service record change forms, attendance, evaluations, applications, tenure evaluations, investigations, testing, training, blood borne pathogen training, transcripts, contracts, disciplinary records, layoff notices, recall notices, certifications for CPR and first aid, bus driver certifications, current driver's licenses, driving records, and police accident reports.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 30 years THEN: Destroy	4/11/2023
Personnel	0402-	Employment Verification Records	These records document requests that are received from mortgage or credit companies that want to verify the employment status of an employee.	RETAIN UNTIL: Date created PLUS: 30 days THEN: Destroy	4/11/2023
Personnel	0403-	Background Files	These records document that school districts complied with the requirement to conduct background checks on all employees They may include, but may not be limited to, release forms to conduct criminal history checks, fingerprint checks and professional conduct checks, and the results of those checks.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 6 years THEN: Destroy	4/11/2023
Personnel	0404A-	Medical Files - Non-exposure	These records document employee medical information pertinent to employment. They are maintained separately from the employee personnel file (see item #400). They may include, but may not be limited to, medical leave applications, insurance forms (including disability forms), leave extension requests, medical certifications by physician, applications for continuation of insurances, doctor's releases, supporting medical documentation, accommodations, blood tests, vision and hearing tests, tuberculosis tests, off-work notices, family medical leave act, drug and alcohol tests, and current physical exams.	RETAIN UNTIL: Individual is employed by the school district or receiving benefits, whichever is longer PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Personnel	0404B-	Medical Files - Exposure	These records document employee medical information pertinent to employment that document employee exposure to toxic substances or blood-borne pathogens. They are maintained separately from the employee personnel file (see item #400 They may include, but may not be limited to, medical leave applications, insurance forms (including disability forms), leave extension requests, medical certifications by physician, doctor's releases, supporting medical documentation, and exposure documentation. Retention of these files is governed by OSHA 29 CFR 325.3457.	RETAIN UNTIL: Date created PLUS: 30 years THEN: Destroy	4/11/2023
Personnel	0405-	COBRA Plan Records	These records document the temporary continuation of group health coverage for former employees, retirees, spouses, former spouses, and dependent children that otherwise might be terminated in compliance with the Consolidated Omnibus Budget Reconciliation Act (COBRA). They may include, but may not be limited to, COBRA required notices, documentation or signed acknowledgements that the notices were received by the employee or qualified beneficiary, detailed documentation related to any instance in which COBRA continuation is not offered, enrollment forms, correspondence, monthly statements, and status reports.	RETAIN UNTIL: Qualifying event takes place PLUS: 6 years THEN: Destroy	4/11/2023
Personnel	0406-	Substitute Teacher Records	These records document substitute teachers who are contacted for assignments. They may include, but may not be limited to, contact information, dates contacted, and enrollment or renewal dates with the school district.	RETAIN UNTIL: Notification that the teacher has received full time employment, has moved, does not respond to calls, or fails to renew with the district THEN: Destroy	4/11/2023
Personnel	0407-	Teacher Professional Development Records	These records document that teachers took the required 30 hours of professional development classes each year, and the courses taken by each teacher They may include, but may not be limited to, teacher names, category of class, and number of hours that the class is worth.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 3 years THEN: Destroy	4/11/2023
Personnel	0408-	Employee Training Records	These records document attendance at mandatory training. They may include, but may not be limited to, class lists. Additional documents will be retained in the personnel file.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Personnel	0409 -	I-9 Records	These records document verification by employers of identity and immigration status of all new employees. They may include, but may not be limited to, employment eligibility verification forms, and supporting documentation. 8 CFR 274 a.2 (1998)	RETAIN UNTIL: Date of hire PLUS: 3 years OR RETAIN UNTIL: Termination date PLUS: 1 year WHICHEVER IS LATER THEN: Destroy	4/11/2023
Personnel	0410-	Grievance Records	These records document employee grievances against the school district and the resolution of the grievance. They may include, but may not be limited to, written grievances, correspondence, summary sheets, legal documents, and employee history information.	RETAIN UNTIL: Grievance is resolved PLUS: 1 year THEN: Destroy	4/11/2023
Personnel	0411-	Employee Injury Records - Exposure	These records document any reports of accidents or injuries involving exposure to toxic substances or blood-borne pathogens. These files are maintained separately from the personnel file. They may include, but may not be limited to, incident reports, medical reports, responses by supervisors and management, requests for medical leave, insurance forms, applications for continuation of insurance, and supporting medical documentation. OSHA 29 CFR 1910.1020(d)(1)(i)	RETAIN UNTIL: Date created PLUS: 30 years THEN: Destroy	4/11/2023
Personnel	0412-	Employee Injury Records - Non-exposure	These records document any reports of accidents or injuries involving an employee. They may include, but may not be limited to, incident reports, medical reports, responses by supervisors and management, requests for medical leave, insurance forms, application for continuation of insurance, and supporting medical documentation. 29 CFR 1904.2	RETAIN UNTIL: Fiscal year in which event occurs ends PLUS: 5 years THEN: Destroy	4/11/2023
Personnel	0413-	Employee Injury Records - OSHA 300 Log	These records document employee injuries within a calendar year. 9 CFR 1904.33	RETAIN UNTIL: Calendar year ends PLUS: 5 years THEN: Destroy	4/11/2023
Personnel	0414-	Job Description Records	These records document job classification systems and positions. They may include, but may not be limited to, summary of responsibilities, functions, applicant requirements, salary, and benefit classifications.	RETAIN UNTIL: Replaced by a new version PLUS: 6 years THEN: Destroy	4/11/2023
Personnel	0415-	Position Re-classification Records	These records document requests from an employee to have a position re-classified. They may include, but may not be limited to, copies of existing and proposed job descriptions, decisions affecting the request, and supporting documentation	RETAIN UNTIL: Date created PLUS: 6 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Personnel	0416A-	Job Application Records - Unsolicited or Ineligible	These records document applicants for positions who were not hired. They may include, but may not be limited to, resumes, letters of interest, applications, regret letters, qualification exam scores, unsolicited applications, and supporting documentation.	RETAIN UNTIL: Decision is made to not hire the individual PLUS: 1 year THEN: Destroy	4/11/2023
Personnel	0416B-	Job Application Records - Considered, Not Hired	These records document applicants for positions who were considered, but not hired, regardless of whether they were interviewed. They may include, but may not be limited to, resumes, letters of interest, applications, regret letters, qualification exam scores, and supporting documentation.	RETAIN UNTIL: Position is filled PLUS: 2 years THEN: Destroy	4/11/2023
Personnel	0417-	Emergency Contact Records	These records document the people that the employee wants to be contacted if they are involved in an emergency situation.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023
Personnel	0418-	Workers Disability Compensation Files	These records document claims made for workers disability compensation benefits. They may include, but may not be limited to, reports of the incident or injury made by the employee, and reports from the occupational health center.	RETAIN UNTIL: Claim is settled PLUS: 7 years THEN: Destroy	4/11/2023
Personnel	0419-	Worker Disability Compensation Report Records	These records document reports that are received from disability insurance providers that identify the amount of benefits that were paid from the policy.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Personnel	0420-	Labor Agreement and Negotiation Records	These records document labor negotiations and resulting contracts with individual employees and employee groups. They may include, but may not be limited to, salary and benefit schedules, ground rules proposals and counter proposals, secondary negotiations, meeting minutes, agreements, and final contracts. Teachers may have individual contracts that are maintained in their personnel file (see item #400). Separate files are maintained for each employee negotiating groups.	RETAIN UNTIL: Expiration date PLUS: 10 years THEN: Destroy	4/11/2023
Personnel	0421-	Seniority Records	These records document notifications sent to union presidents about the seniority status of their members.	RETAIN UNTIL: Replaced by a new version PLUS: 1 year THEN: Destroy	4/11/2023
Personnel	0422-	Assurance Records	These records document notices that are distributed to notify all staff who work less than a full year that they will be provided with a reasonable assurance of employment with the school district for a specified period of time.	RETAIN UNTIL: Specified period of time ends THEN: Destroy	4/11/2023
Personnel	0423-	Intent to Return Records	These records document whether the employee intends to return to their position for the following school year. They are distributed to support staff (teacher assistants, paraprofessionals, etc.), per contractual requirements.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Personnel	0424-	Selection Files	These records document the appointment and selection of individuals for employment. They may include, but may not be limited to, job advertisements, recall lists, transfer lists, seniority lists, vacancy reports, selection criteria, candidate evaluations, position descriptions, applications, interview questions, reference checks, drug test results, rating forms, background checks, driving record checks, and appointment recommendations and notifications.	RETAIN UNTIL: Position is filled PLUS: 4 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Payroll	0500A-	Employee Files and Data - Employees Enrolled in a Pension Plan (supersedes item #401)	These records document payroll activities for each employee who is enrolled in a pension plan (such as the MPERS or a locally operated plan). They may include, but may not be limited to, employee data, W-4, hiring authorization, requisitions, pay increase or change of status notices, contract calculations, long-term disability, retirement purchases, current enrollment for benefits (including health, life, disability, dental, vision and supplemental insurance), credit union deposits, flexible spending accounts, investments in tax deferred accounts (such as 403B, 401K, 457, etc.), employee and employer deferral elections, employee and employer loan agreements, contribution limit testing, supporting documentation for garnishments, levies and deductions, tax deferred payment agreements, retirement beneficiary forms, final salary affidavit, and electronic funds transfer	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 50 years OR RETAIN UNTIL: MPERS retirement PLUS: 6 years WHICHEVER IS SOONER THEN: Destroy	4/11/2023
Payroll	0500B-	Employee Files and Data - Employees Enrolled in Defined Contribution Plans Only (supersedes item #401)	These records document payroll activities for each employee who is enrolled in a defined contribution plan only and does not receive a pension. They may include, but may not be limited to, employee data, W-4, hiring authorization, requisitions, pay increase or change of status notices, contract calculations, long-term disability, current enrollment for health benefits, credit union deposits, flexible spending accounts, investments in tax deferred accounts (such as 403B, 401K, 457, etc.), employee and employer deferral elections, employee and employer loan agreements, contribution limit testing, supporting documentation for garnishments, levies and deductions, tax deferred payment agreements, beneficiary forms, final salary affidavit, and electronic funds transfer applications.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 6 years THEN: Destroy	4/11/2023
Payroll	0501-	Salary and Benefit Schedule Records	These records document the rate of pay for employees and define the benefits that are offered.	RETAIN UNTIL: Date created PLUS: 6 years THEN: Destroy	4/11/2023
Payroll	0502-	Payroll Register Records	These records document payroll activities for employees enrolled in a pension plan. They may include, but may not be limited to, employee name, social security number, employee identification number, gross wages, deductions, net pay, current pay period, and year to date earnings.	RETAIN UNTIL: Fiscal year ends PLUS: 50 years THEN: Destroy	4/11/2023
Payroll	0503-	Payroll Report Records	These records document reports that are generated after paychecks are issued to verify the accuracy of the payroll. They may include, but may not be limited to, payroll summaries, pay journals, check registers, account distributions, payroll liabilities, payroll transactions, payroll account creation reports, gross pay balance, and deduction registers.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Payroll	0504-	Retirement Report Records	These records document reports that track employee and school district contributions into retirement plans. They may include, but may not be limited to, payroll dates, employee names, social security numbers, employee identification numbers, retirement hours, wage codes, classifications, retirement wages, withholdings for the member investment plan, district contributions, rates of pay, contract dates, and number of payments per year.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Payroll	0505-	Time and Attendance Records	These records document the hours worked and leave time used by each employee for each pay period.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years, or final average compensation calculation, whichever is longer THEN: Destroy	4/11/2023
Payroll	0506-	Federal and State Tax Deduction Records	These records document payment of financial liabilities for monies withheld from employee wages. They may include, but may not be limited to, quarterly forms 941 to pay reporting to the Internal Revenue Service for taxes withheld, quarterly transfer of state withholding and sales taxes, Medicaid wage detail, and quarterly reports.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Payroll	0507-	W-2 and W-3 Records	These records document the annual gross wages, federal, state, Medicare, and local taxes withheld for each employee for the purpose of reporting income taxes.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Payroll	0508-	Michigan Employment Security Commission (MESC) Report Records	These records document reports that are generated for both contributing and reimbursing employers, generally on a quarterly basis. They may include, but may not be limited to, employee names, wages, and social security numbers.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023
Payroll	0509-	Unemployment Claim Records	These records document people who are claiming unemployment benefits from the school district via the Unemployment Insurance Agency. They are used to verify that the people are entitled to these benefits, and to resolve discrepancies.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Payroll	0510-	Wage Differential Report Records	These records document wage differentials between sexes. They may include, but may not be limited to, reports, and supporting documentation.	RETAIN UNTIL: Date created PLUS: 2 years THEN: Destroy	4/11/2023
Payroll	0511-	Employee Abandoned Wage Records	These records document abandoned employee wages that are reported and remitted to the Michigan Department of Treasury. They may include, but may not be limited to, employee's name and last known address.	RETAIN UNTIL: Individual is no longer employed by the school district PLUS: 10 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Pupil Accounting	0600-	Membership Reporting Records	These records document counts of students that are conducted twice each year and are submitted to the Center for Educational Performance and Information (CEPI) and/or the Michigan Department of Education. They may include, but may not be limited to, school district and ISD reports documenting their submission, validation records, and audits of the pupil FTE count.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	4/11/2023
Pupil Accounting	0601-	Planned and Actual Days and Clock Hours Reporting Records	These records document two annual reports that submitted electronically to the Michigan Department of Education to monitor compliance with MCL 388.1701, dealing with the required number of days and clock hours of instruction. They may include, but may not be limited to, Planned Days and Clock Hours reports, and Actual Days and Clock Hours reports, ISD audits, and correspondence.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	4/11/2023
Pupil Accounting	0602-	Student Count Support Records	These records document preparation of the pupil counts that are submitted to the Michigan Department of Education. They may include, but may not be limited to, records required by the Pupil Accounting Manual (see section 1—Required Documents).	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	4/11/2023
Pupil Accounting	0603-	Internal Audit Records	These records document periodic audits conducted by school districts of their school buildings to confirm that documentation for FTE and non-traditional students is accurate. They may include, but may not be limited to, checklists of paperwork and counts, and alphabetical membership lists of students.	RETAIN UNTIL: ISD audit is completed PLUS: 3 years THEN: Destroy	4/11/2023
Pupil Accounting	0604-	External Audit Records -	These records document audits of local school districts that are conducted randomly by the ISD to verify student counts (FTE) and that procedures are in place and followed. They may include, but may not be limited to, worksheets, and checklists of errors and problems.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	4/11/2023
Pupil Accounting	0605-	Pupil Audit Records -	These records document the submission by local school districts of pupil accounting data to the ISD. The ISD conducts desk audits of the paperwork to verify its accuracy. In addition, ISDs conduct random field audits at local school districts, and they audit pupil exit statuses and other pupil data used in calculating annual graduation and pupil dropout rates. They may include, but may not be limited to, worksheets, notes and checklists of errors and problems, and narrative reports that summarize audit findings for each school district and each count that is conducted.	RETAIN UNTIL: Fiscal year ends PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Pupil Accounting	0606-	Unique Identification Code (UIC) Data	These record document codes are assigned by the Center for Educational Performance and Information (CEPI) to each student in the State of Michigan. They may include, but may not be limited to, code numbers, student names, birth dates, genders, general education FTE, special education FTE, alternative education FTE, dates enrolled, and school identification numbers.	RETAIN UNTIL: Student reaches the age of 26 THEN: Destroy	4/11/2023
Pupil Accounting	0607-	Graduation and Dropout Audit Records	These records document audits conducted by ISDs of data submitted by school districts about graduation and dropout activity.	RETAIN UNTIL: Date created PLUS: 7 years THEN: Destroy	4/11/2023
Pupil Accounting	0608-	Teacher Certification Audit Records	These records document audits conducted by ISDs of data submitted by school districts about teacher certifications.	RETAIN UNTIL: Date created PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Instruction	0700-	Standardized Testing Data	These records document summary scores for statewide and locally administered standardized tests taken by students. They may include, but may not be limited to, SAT, PSAT, ACT, MSTEP, NWEA, AIMSweb, iReady, and Dibels.	RETAIN UNTIL: Fiscal year ends PLUS: 5 years THEN: Destroy	4/11/2023
Instruction	0701-	District Assessment Records	These records document the scores of each student in the district on year-end math tests, language arts tests, writing tests, diagnostic reading tests, etc. They may include, but may not be limited to, student names, teachers, grades, school, and scores.	RETAIN UNTIL: Graduation, transfer, or expected graduation date THEN: Destroy	4/11/2023
Instruction	0702-	Curriculum Development Records	These records document annual plans that map out curriculum goals, subject area benchmarks, grade level goals or expectations, etc. They may include, but may not be limited to, council notes, parent guides, report card templates, annual reports, and sexual education advisory committee records.	RETAIN UNTIL: No longer of use for reference when updating the curriculum THEN: Destroy	4/11/2023
Instruction	0703-	School Improvement Plan Records	These records document plans that are submitted to the Michigan Department of Education through the consolidated application. They cover a 3 to 5-year range of testing goals, strategies to improve student performance, professional development, etc. They may include, but may not be limited to, meeting notes, reference data, test scores, and surveys.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Information Technology	0800-	Technology Inventory Records	These records document the school district's inventory of equipment, software, telephones, etc. They may include, but may not be limited to, tag numbers, locations, serial numbers, price, and account sources.	RETAIN UNTIL: Annual report for the fiscal year in which the item was disposed is audited THEN: Destroy	4/11/2023
Information Technology	0801-	Software License Agreement Records	These records document agreements that define how many users are licensed to access each software application.	RETAIN UNTIL: Expiration date THEN: Destroy	4/11/2023
Information Technology	0802-	Internet Access Policy and Agreement Records	These records document the terms of use and access of the Internet, information technology resources, network access, etc. The documents are used to generate user accounts for staff, teachers, and students. They are signed by the user and a parent if the user is under the age of 18.	RETAIN UNTIL: Replaced by a new version, or the person is no longer a user THEN: Destroy	4/11/2023
Information Technology	0803-	Technology Service Request Records	These records document problems with equipment, and they are used to generate repair tickets. They may include, but may not be limited to, user names, descriptions of the problem, locations of the equipment, and date and time the request was received and resolved.	RETAIN UNTIL: Fiscal year ends THEN: Destroy	4/11/2023
Information Technology	0804-	Technology Network Maps and Records	These records document the mapping and description of the school district's technology infrastructure and the wiring of phone lines. They may include, but may not be limited to, security information, identification numbers, and passwords.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023
Information Technology	0805-	Internet Site and Social Media Content (obsolete)	These records document a school district's website and social media accounts. These platforms are used to present information to employees, students, and the public about programs, events, and activities. They may include, but may not be limited to, the content and layout of the website, and social media postings.	<i>Content published online, including social media postings, do not have a single retention period. Refer to other items on the schedule that cover the posted content.</i>	4/11/2023
Information Technology	0806-	Communications Device Records	These records document which staff are issued 2-way radios, cell phones, etc. to facilitate communication. They may include, but may not be limited to, service contracts, employee contracts, FCC licenses, and distribution lists, phone numbers, and passwords.	RETAIN UNTIL: Equipment is returned by the staff or destroyed THEN: Destroy	4/11/2023
Information Technology	0807-	Technology Training Records	These records document training conducted by information technology staff about the use of computer software or equipment for school district employees. They may include, but may not be limited to, curricula materials.	RETAIN UNTIL: Course materials are replaced by a new version, or until the course is dropped entirely from the training curriculum THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Information Technology	0808-	Universal Service Fund (USF) Records	These records document the amount of the USF discount that is awarded to the school district and how the allocation was computed. They may include, but may not be limited to, receipt and delivery records relating to the technology plans, pre-bidding, bidding, contracts, application process, invoices, provision of services, and supporting documentation. [Paragraphs 45-50 in the FCC's 5th Report and Order (FCC 04-190)]	RETAIN UNTIL: Last service date PLUS: 5 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Security/Public Safety	0900-	Incident Case Files	These records document criminal and non-criminal incidents taking place on school property and at school events, including theft and vandalism. They may include, but may not be limited to, police reports, petitions, warrants, witness lists, evidence envelopes, statements, audio or video recordings, and photographs.	RETAIN UNTIL: Case is closed, and any potential litigation ends PLUS: 7 years THEN: Destroy	4/11/2023
Security/Public Safety	0901-	Complaint Number Log Data	These records document the complaint number that is assigned to each incident file, and summary information about each incident. Data may include, but may not be limited to, incident numbers, dates, times, buildings, locations, offense types, victims, accused, and comments.	RETAIN UNTIL: Date created PLUS: 7 years THEN: Destroy	4/11/2023
Security/Public Safety	0902-	Daily Activity Log Data	These records document the daily activities of public safety officers, including contact with students and incidents.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	4/11/2023
Security/Public Safety	0903-	Security Video Recordings	These records document recordings created by any type of device for routine surveillance or security, training, patrols, incidents, activities, school bus trips, public space, or crowd monitoring, etc.	RETAIN UNTIL: Date created PLUS: 30 days THEN: Destroy	4/11/2023
Security/Public Safety	0904-	Building Sign In and Sign Out Records	These records document when students arrive or depart the building at unscheduled times, and when visitors (tutors, parents, presenters) arrive or leave the building. They may include, but may not be limited to, logs, and sheets.	RETAIN UNTIL: School year ends THEN: Destroy	4/11/2023
Security/Public Safety	0905-	Emergency Planning Records	These records document the command structure and crisis management response plan for emergencies and disasters to ensure the continuity of operations. They may include, but may not be limited to, plans, contact lists, checklists, manuals, procedures (operational, security, recovery, evacuation, etc.), site-specific information, and supporting documentation. They are reviewed and updated annually.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023
Security/Public Safety	0906-	Emergency Drill Records	These records document emergency drills that are conducted by school in accordance with MCL 29.19. They may include, but may not be limited to, drill type, drill date and time, evacuation information, areas in need of improvement.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Security/Public Safety	0907-	Security Planning Records	These records document security planning for each building. They may include, but may not be limited to, surveys of buildings, improvement plans, and response plans.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023
Security/Public Safety	0908-	Building Security Data	These records document monitoring of card access to buildings by tracking each time a card is swiped or scanned. Data may include, but may not be limited to, date, time, location, and card holder.	RETAIN UNTIL: School year ends PLUS: 1 year THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Facility Operations	1000-	Building Plan Records	These records document the “as-built” design and construction of school facilities. They may include, but may not be limited to, schematics for plumbing, electrical, architectural, structural, and mechanical features, specifications for products, and materials and equipment that were used during construction. The files may also contain operational and maintenance manuals and warranties that are used to support the maintenance of the facilities and will be revised if changes are made to the infrastructure.	RETAIN UNTIL: Facility is no longer owned by the school district THEN: Destroy	4/11/2023
Facility Operations	1001-	Construction Close-out Files	These records document property that will be maintained by the school district. They may include maintenance manuals, equipment inventories, parts lists, warranties, etc.	RETAIN UNTIL: Item is replaced or disposed of THEN: Destroy	4/11/2023
Facility Operations	1002-	Shop Drawing Files	These records document drawings with specifications for equipment that are submitted by engineers and will be used and purchased by the school district. These drawings are used to ensure that the product is installed properly.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	4/11/2023
Facility Operations	1003-	Work Order Records - Warranty	These records document maintenance work performed on school facilities, and they support the warranty of the property. Work orders may be issued for preventative maintenance and repairs to the grounds and buildings. They may include, but may not be limited to, dates opened and closed, staff who performed the maintenance work, parts and materials that were purchased, and descriptions of the problem.	RETAIN UNTIL: Warranty expires THEN: Destroy	4/11/2023
Facility Operations	1004-	Work Order Records - No Warranty	These records document maintenance work performed on school facilities that do not have a warranty. Work orders may be issued for preventative maintenance and repairs to the grounds and buildings. They may include, but may not be limited to, dates opened and closed, staff who performed the maintenance work, parts and materials that were purchased, descriptions of the problem, etc.	RETAIN UNTIL: Work is completed PLUS: 1 year THEN: Destroy	4/11/2023
Facility Operations	1005-	Asbestos Removal Plan Records	These records document management plans for the removal of asbestos, in compliance with the Hazard Emergency Response Act (HERA). They may include, but may not be limited to, plans, inspection reports that are produced every 6 months, and annual public notices.	RETAIN UNTIL: Facility is no longer owned by the school district THEN: Destroy	4/11/2023
Facility Operations	1006-	Pollution Prevention Plan Records	These records document Pollution Incident Prevention (PIP) plans that are developed to ensure that fuel tanks do not become pollution hazards.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Facility Operations	1007-	Key and Badge Authorization Records	These records document which employees assigned keys or badges to access the facilities. They may include, but may not be limited to, employee's name, employee's identification number, date issued, date returned, key or badge code, and authorizer's name.	RETAIN UNTIL: Key is returned THEN: Destroy	4/11/2023
Facility Operations	1008-	License and Permit Records	These records document legally required permits and licenses for regular operation of school facilities and services, as well as construction. They may include, but may not be limited to, building permits, and elevator permits.	RETAIN UNTIL: Expiration date PLUS: 1 year THEN: Destroy	4/11/2023
Facility Operations	1009-	Inspection Certificate Records	These records document that facilities passed safety inspections. They are maintained for the boiler, electrical system, vehicles, fire marshal plan approvals, fire marshal occupancy approvals, etc.	RETAIN UNTIL: Certificate is replaced by a new version, or the equipment or building is no longer owned THEN: Destroy	4/11/2023
Facility Operations	1010-	Hazardous Material Safety Data Sheet Records	These records document compliance with federal law [OSHA 29 CFR 1910.1200.g] that requires employers to provide Material Safety Data Sheets to staff regarding any hazardous material on the premises. They may include, but may not be limited to, information about the product manufacturer, composition, physical and chemical properties, identification of hazards, fire hazard, accidental release measures, handling, and storage, first aid measures, toxicology, ecological information, disposal and transport considerations, and regulatory information.	RETAIN UNTIL: Hazardous material is no longer used or stored on school property PLUS: 30 years THEN: Destroy	4/11/2023
Facility Operations	1011-	Warehouse Inventory Records	These records document items that are stored at the warehouse including office supplies, computers, furniture inactive records, etc.	RETAIN UNTIL: Item is shipped to a school district building, is sold as surplus, or is destroyed PLUS: 1 year THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Food Service	1100-	Meal Production Records	These records document the amount of food that is planned, prepared, and served each day by building. They may include, but may not be limited to, menu items, approximate number of meals, serving sizes, date, and temperatures of food.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1101-	Meals Sold Reporting Records	These records document the number of meals that are sold at each building within each category. They are used to produce the monthly claim.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1102-	Daily Participation Records	These records document the daily meal counts by building and by category for the month and are used to prepare the monthly claim.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1103-	Monthly Claim Records	These records document claims that are submitted to the Michigan Department of Education on a monthly basis to request reimbursement for paid, reduced and free meals. They may include, but may not be limited to, number of meals served by category for breakfast and lunch by building, number of students enrolled in each building, number of students approved for free and reduced meals, and number of serving days within each month.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1104-	School Food Authority Verification Collection Reporting Records	These records document the number of students eligible for reduced and free meal benefits and the accuracy of benefit assignment that is submitted by school districts annually to the Michigan Department of Education.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1105-	Free and Reduced Meal Application Records	These records document applications that are submitted for each family with students in the school district for participation in school meal programs. They are also used to identify eligibility for free or reduced price meals in accordance with U.S. Department of Agriculture guidelines. They may include, but may not be limited to, student names, school buildings, grades, parental income, social security numbers, addresses, and phone numbers.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1106-	Free and Reduced Meal Application Verification Records	These records document the verification that students are eligible to receive free or reduced priced meals. They may include, but may not be limited to, applications that were selected for verification, letters to parents, income verification documents, and summaries of the <u>verification process</u> .	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1107-	Food Inventory Records	These records document the monthly inventory of the food and supplies on hand. They may include, but may not be limited to, item name, codes, and cost.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1108-	Health Department Inspection Records	These records document on-site inspections conducted by local health departments of production and service kitchens. They may include, but may not be limited to, <u>correspondence, and inspection reports</u> .	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023

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Food Service	1109-	Commodity Consortium Records	These records document school district participation in a consortium to assist with the purchasing of food and supplies. USDA commodity foods could be diverted to the consortium. They may include, but may not be limited to, which food items were ordered and delivered, and where they are physically located in the delivery process.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1110-	Commodity Consortium Order Summary Records	These records document the commodity orders for the next school year.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1111-	Commodity Fair Share and Bonus Surplus Order Records	These records document orders for deliveries of commodities.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1112-	Debit Account Records	These records document the balance in each student's debit account. They may also be used to produce summary reports and meal histories. They may include, but may not be limited to, student name, student identification number, building, grade, status, amount deposited, amount spent, daily balance.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1113-	After School Snack Program Reporting Records	These records document the number of snacks that are provided to students participating in after school programs for reimbursement. They may include, but may not be limited to, daily and monthly reports identifying which food and beverage items were served, and the amount consumed.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1114-	After School Snack Program On-Site Review Records	These records document reviews that are completed by the local school district within the first four weeks of the snack operation. The second review is completed after January 1.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1115-	Summer Food Service Program Claim Records	These records document monthly claims that are submitted for meals provided to students participating in summer programs. They may include, but may not be limited to, daily meal counts by site, site reviews, daily production reports, and applications.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1116-	Summer Food Service Program Application and Renewal Records	These records document enrollment in the Summer Food Service Program. They may include, but may not be limited to, information about food production sites, buildings where food is served and prepared, school names and addresses, enrollment, and contact information.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1117-	Year End Reporting Records	These records document reports that are submitted at the end of the school year to the Michigan Department of Education. They may include, but may not be limited to, reports identifying the revenue and expenses by accounting categories and meal programs.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Food Service	1118-	Building On-site Review and Inspection Records	These records document inspections that are conducted annually by the local school district by February 1 of each school year. They are submitted to the Michigan Department of Education. They are used to support auditing of menus, pricing, sanitation, and other factors.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1119-	Administrative Review and Nutrition Analysis Records (supersedes item #1120)	These records document audits that are conducted by the Michigan Department of Education periodically to verify compliance with the requirements of school meal programs so districts can receive reimbursement for qualified expenses. They may include, but may not be limited to, administrative review documents, correspondence, nutrition analyses, menus, nutrition labels, recipes, and reports.	RETAIN UNTIL: Subsequent audit is completed PLUS: 1 year THEN: Destroy	4/11/2023
Food Service	1121-	Miscellaneous Food Revenue Records	These records document various sources of food revenue, such as catering, special events, adult sales, etc. They are used for event planning and billing. They may include, but may not be limited to, group or event names, dates, locations, customers, number of people, menu, billing information.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Food Service	1122-	Civil Rights Compliance Records	These records document civil rights compliance activities. They may include, but may not be limited to, training records, complaints logs, and complaint procedures.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023

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Transportation	1200-	Vehicle Files	These records document all vehicles in the school district's fleet, including buses. They may include, but may not be limited to, registrations, titles, bus repair orders, maintenance work documents, and State Police inspections.	RETAIN UNTIL: Vehicle is no longer owned by the school district THEN: Destroy	4/11/2023
Transportation	1201-	Student Trip Records	These records document when school buses are used to provide transportation for trips both inside and outside of the school district. These activities may include same-day field trips, overnight trips, athletic trips, etc. They may include, but may not be limited to, transportation request forms, trip mileage reports, itineraries, driver information, and copies of driver meal reimbursements.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1202-	Student Transportation Conduct Reporting Records	These records document each incident that occurs on a school bus. They may include, but may not be limited to, date of the incident, student's name, school, grade, whether previous reports have been filed for that student, driver name, bus number, a description of the incident, and parental signature. Reports for severe offenses may be kept longer and may be copied into the student file (see item #1400B).	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1203-	Driver Inspection Reporting Records	These records document inspections conducted by bus drivers that are used to identify maintenance or repair work that is needed. They may include, but may not be limited to, driver's name, bus number, date, mileage, gallons of fuel, quarts of oil, equipment that was inspected, and maintenance work was performed.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1204-	Bus Stop Review Records	These records document requests that the location of bus stops be reviewed. They may include, but may not be limited to, date, driver's name, bus number, stop location, route, reason for the request, concerns, and actions taken.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Transportation	1205-	Running Red Light Reporting Records	These records document when a bus driver reports that a vehicle ran the red light or stop sign on the bus when the bus was stopped for passengers. They may include, but may not be limited to, date, bus driver's name, bus number, location of the incident, time of incident, number of road lanes, weather conditions, incident description, and description of vehicle and driver.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1206-	Incident Reporting Records	These records document miscellaneous incidents that are reported by bus drivers, such as when they hit a mailbox, a student falls on steps or icy sidewalks, etc. They may include, but may not be limited to, driver's name, bus number, people involved, and incident description.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1207-	Vehicle Crash Files	These records document crashes involving school vehicles. They may include, but may not be limited to, Traffic Crash Reports, and correspondence.	RETAIN UNTIL: Vehicle is no longer owned by the school district THEN: Destroy	4/11/2023

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Transportation	1208-	Dangerous Railroad Crossing Reporting Records	These records document when a railroad crossing is not functioning properly. A copy of the report is sent to the company responsible for the crossing.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1209-	Fuel Log Records	These records document invoices that are received from the company supplying fuel to the school district. They may include, but may not be limited to, number of gallons sold, cost per gallon, bus number, and driver.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1210-	School Bus Scheduling Records	These records document the routes taken by the district's buses. They may include, but may not be limited to, time and location of each stop on the route.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Transportation	1211-	Dispatch Logs	These records document where school buses are assigned to travel. They may include, but may not be limited to, bus number, driver, date, time, destination or route, and mileage.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023

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Television Services	1300-	Television Recordings - Finished Products	These records document television recordings that are produced of school board meetings, sporting events, theatrical productions, concerts, award ceremonies, etc. The finished product may be the edited version of raw footage, or it may be a recording of a live event that is unedited. Finished products are aired by the television station.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Television Services	1301-	Television Recordings - Raw Footage	These records document raw footage of events that may be edited prior to airing on the television station.	RETAIN UNTIL: Finished product is completed THEN: Destroy	4/11/2023
Television Services	1302-	Production Scheduling Records	These records document the schedule of events that will be recorded. They may include, but may not be limited to, dates, times, events, locations, staff assignments, recording lengths, and camera types used.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Television Services	1303-	Program Scheduling Records	These records document the schedule of programs that will be aired by the television station. They may include, but may not be limited to, dates, times, program lengths, and program topics.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Television Services	1304-	Recording Inventory Records	These records document the inventory of recordings that are maintained of past events. They may include, but may not be limited to, recording numbers, dates, events, lengths, and formats.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023

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Schools - Student Records	1400A-	Student Files and Data - Academic Records (formerly CA-60) (supersedes item #1407, 1408, 1409)	These records document each student enrolled in classes at the school district (including adult education, cooperative education such as career and technical education, shared time pupils, and dual enrollment pupils), and follow the student from enrollment through graduation, transfer, or withdrawal. The academic records include personal information about the student that may be collected on the CA-60 form/folder, on some other form that is used by the school district, or in the student information system, transcripts, approved personal curriculums, withdrawal documents, and GED test results, as well as disclosure documents, amendment documents, and destruction documents that are applicable to the academic records.	RETAIN UNTIL: Student graduates or student's expected graduation date PLUS: 60 years THEN: Destroy	4/11/2023
Schools - Student Records	1400B-	Student Files and Data - Other Records (supersedes item #1407, 1408, 1409)	These records document each student enrolled in classes at the school district (including adult education, cooperative education such as career and technical education, shared time pupils, and dual enrollment pupils). They may include, but may not be limited to, most recent enrollment records, emergency contact information, photos from each school year, early childhood education program records, school of choice applications, attendance records, report cards, academic progress reports, educational development plans (EDP), court orders (relating to divorce, custody, foster care, etc.), disciplinary records (including police reports, suspension or expulsion notices, etc.), age of majority release forms, social developmental evaluations, non-special education service notes and assessments and evaluations, language assessments, and correspondence, as well as disclosure documents, amendment documents, and destruction documents that are applicable to the non-academic records.	RETAIN UNTIL: Student graduates, or student's expected graduation date THEN: Destroy	4/11/2023
Schools - Student Records	1401-	Student Health Records (supersedes item #1402, 1504)	These records document a student's health, and health services provided by a school nurse, or designated school personnel acting in the absence of a school nurse. They may include, but may not be limited to, immunization records, doctor's medical orders, physician instructions, medication administration records, vision and hearing screening tests, nursing notes, nursing care plans, nursing reports, and treatment records.	RETAIN UNTIL: Student graduates PLUS: 7 years THEN: Destroy	4/11/2023
Schools - Student Records	1403-	Personal Protection Order Records	These records document court orders that identify people who are not allowed to have contact with an individual student.	RETAIN UNTIL: Order expires THEN: Destroy	4/11/2023

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Schools - Student Records	1404-	Enrollment Eligibility Records	These records document that a student is eligible to enroll in schools (including adult education) within the school district without paying tuition fees. They may include, but may not be limited to, proof of identity, age, and residency.	RETAIN UNTIL: Replaced by a new version, or until student graduates, whichever occurs first THEN: Destroy	4/11/2023
Schools - Student Records	1405-	Student Standardized Testing Data	These records document test scores and analysis for standardized tests that were taken by individual students. They may be used to grant Michigan Merit Awards to students.	RETAIN UNTIL: Student graduates PLUS: 5 years THEN: Destroy	4/11/2023
Schools - Student Records	1406-	Student Work Permit Records	These records document minors over the age of 14 who must have a work permit prior to beginning work. Schools must approve the work permit, and new permits are required for each new job held by the teenager. They may include, but may not be limited to, completed permits, job offers, approved deviations, correspondence, injury reports, workers compensation documents, and work and school training agreements or contracts.	RETAIN UNTIL: Student graduates PLUS: 7 years THEN: Destroy	4/11/2023
Schools - Student Records	1410-	Student Census Records (obsolete)	These records document all students who attended each school for each school year. They may include, but may not be limited to, students, parents, addresses, and birth dates.	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023
Schools - Student Records	1411-	Student Record Transfer Request Records	These records document that another school district requested the transfer of a student's file and that the file was sent to the other school district.	RETAIN UNTIL: Date created PLUS: 4 years THEN: Destroy	4/11/2023
Schools - Student Records	1412-	Special Program Authorization Records	These records document tutoring and other services that are provided to students through federally or state-funded special programs, such as the Title I program. They may include, but may not be limited to, authorization forms signed by parents allowing their child to participate in the program.	RETAIN UNTIL: No longer required by the rules of the funding program THEN: Destroy	4/11/2023

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Schools - Building Administration	1500-	Accreditation Records - Work Papers	These records document the accreditation process that school buildings may choose to participate in. They may include, but may not be limited to, school improvement plans, reports, goals and objectives, school profiles, evidence of performance, and field inspection documentation.	RETAIN UNTIL: Replaced by a new version or expired THEN: Destroy	4/11/2023
Schools - Building Administration	1501-	Accreditation Records - Certificates	These records document the accreditation that is received by the school building.	RETAIN UNTIL: School district is dissolved THEN: Destroy	4/11/2023
Schools - Building Administration	1502-	Gradebooks	These records document the grades that students received from their teachers throughout the school year, and which are often entered into the student information system (see item #1400A-B). They may include, but may not be limited to, student names, grades, and attendance.	RETAIN UNTIL: Fiscal year ends PLUS: 3 years THEN: Destroy	4/11/2023
Schools - Building Administration	1503-	Daily Lesson Plans and Objectives Files	These records document class assignments related to each curriculum objective that are planned by teachers. They are modified each year to address new curriculum standards and the learning needs of the students.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Schools - Building Administration	1505-	Summary Testing Data	These records document student performance on standardized tests. Reports will document the scores of all students in the building who took the test.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	4/11/2023
Schools - Building Administration	1506-	Locker Records	These records document student locker assignments. They may include, but may not be limited to, student's name, locker number, and lock combination.	RETAIN UNTIL: Fiscal year ends THEN: Destroy	4/11/2023
Schools - Building Administration	1507-	Student Trip Files	These records document student trips, including same-day field trips, overnight trips, etc. They may include, but may not be limited to, health forms, itineraries, proof of insurance, driver information, permission slips, transportation request forms, and trip mileage reports.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Schools - Building Administration	1508-	Facilities Scheduling Records	These records document the scheduling of school facilities for group activities or events. They may include, but may not be limited to, internal request forms, and rental agreements. These documents may contain the customer contact information, reservation information, reservation number, etc. This information may be used to generate confirmation letters, building event schedules, etc.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1509-	Swimming Pool Usage Records	These records document who used the school swimming pool. They may include, but may not be limited to, date, time, name of the teacher or group, and number of people.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1510-	Student Handbook Records	These records document district and school policies that are published annually in handbooks that are distributed to students and their parents.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023

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Schools - Building Administration	1511-	Student Directory Records	These records document students attending the school. They may include, but may not be limited to, grades, classrooms, student names, addresses, and phone numbers.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1512-	Curriculum Guide Records	These records document the curriculum that is approved annually by the school district's board of education. They may describe the courses that are offered by the district, the requirements for graduation, and off-campus educational opportunities that are available.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1513-	Teacher Handbook Records	These records document employee policies, procedures, expectations, etc. They may include, but may not be limited to, handbooks that are published annually and are distributed to teachers.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1514-	Teacher Directory Records	These records document which teachers are employed by the school district each year. They may include, but may not be limited to, teacher names, schools, grades, phone numbers, and addresses.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1515-	Yearbook Records	These records document the students, teachers, and staff of the school each year. They may include, but may not be limited to, photographs and information about athletic teams, clubs, and special events, during the school year.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1516-	Graduation Program Records	These records document annual commencement exercises.	RETAIN UNTIL: No longer of use for reference THEN: Destroy	4/11/2023
Schools - Building Administration	1517-	Drivers Education Records	These records document drivers' education courses that may be offered by the school district. They may include, but may not be limited to, student rosters, grade books, copies of learner's certificates, accountability reports that are submitted to the Secretary of State for reimbursement, curricula, and exams.	RETAIN UNTIL: Fiscal year ends PLUS: 4 years THEN: Destroy	4/11/2023
Schools - Building Administration	1518-	Special Event Files	These records document field days, concerts, theatrical programs, art exhibits, award programs, etc. They may include, but may not be limited to, rosters, programs, flyers, schedules, and financial information.	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023
Schools - Building Administration	1519-	Schools of Choice Application Records - Denied and Not Enrolled	These records document students who submitted schools of choice applications that were either denied or did not enroll. They may include, but may not be limited to, applications, and correspondence.	RETAIN UNTIL: End of the school year for which the student applied THEN: Destroy	4/11/2023
Schools - Building Administration	1520-	Volunteer Background Check Records	These records document security screenings and background checks that are conducted for school volunteers and people transporting students. They may include, but may not be limited to, applications, driving record checks, correspondence, and the results of name-based background checks through the Internet Criminal History Access Tool (ICHAT).	RETAIN UNTIL: Current school year ends PLUS: 1 year THEN: Destroy	4/11/2023

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Schools - Building Administration	1521-	Child Protective Services and Education Neglect Referral Records	These records document when the school district notifies authorities about potential abuse or neglect of a student. They may include, but may not be limited to, forms, correspondence, and supporting documentation. These files should be kept separate from the Student Academic Records (see item #1400A-B).	RETAIN UNTIL: Student is no longer enrolled in the district PLUS: 1 year THEN: Destroy	4/11/2023

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Schools - Guidance Counseling	1600-	Student Counseling Files	These records document the assistance that students receive from guidance counselors. They may include, but may not be limited to, correspondence and notes about student issues and concerns.	RETAIN UNTIL: Counselor is assigned to provide services to the student THEN: Destroy	4/11/2023
Schools - Guidance Counseling	1601-	Child Support Team Files	These records document meetings with teachers, parents, students, and guidance counselors to develop an action plan for general education students who need assistance with academic and behavior issues. They may include, but may not be limited to, notes, action plans, progress reports, correspondence, and testing.	RETAIN UNTIL: Counselor is assigned to provide services to the student THEN: Destroy	4/11/2023
Schools - Guidance Counseling	1602-	Accommodation Plan Records - Section 504	These records document plans to accommodate the needs of non-special education students with disabilities, including ADHD, depression, dyslexia, etc. They may include, but may not be limited to, plans, notes, correspondence, progress reports, grades, and testing.	RETAIN UNTIL: School district is no longer providing services in accordance with the plan PLUS: 3 years THEN: Destroy	4/11/2023
Schools - Guidance Counseling	1603-	Educational Development Plan Records	These records document assistance provided to students with preparing for their future. They may identify how students will prepare for their future through career education, jobs, community service and extra-curricular activities, including athletics. Students may be tested to identify their interests and skills so suggestions can be made about career pathways and high school course work. They may include, but may not be limited to, test results, and plans.	RETAIN UNTIL: Replaced by a new plan or the student graduates, or student's expected graduation date, whichever is sooner THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools - Special Education	1700-	Special Education Student Files	These records document the services that are provided to special education students including speech therapy, occupational therapy, physical therapy, social workers, etc. They may include, but may not be limited to, evaluations, referrals, multidisciplinary evaluation team (MET) summaries, achievement tests, progress reports, permission forms, nursing notes, height and weight charts, doctor evaluations, psychological reports, therapy reports and scripts, behavioral plans, releases and permissions, vocational information, due process hearings, correspondence, and Section 53 qualification documents. [34 CFR 300.573]	RETAIN UNTIL: Student graduates, was expected to graduate, or completes the program PLUS: 3 years THEN: Destroy	4/11/2023
Schools - Special Education	1701-	Individual Education Plan (IEP) Records	These records document plans that are developed primarily for special education students to identify education goals and services that will be provided by the school district to assist the student.	RETAIN UNTIL: IEP meeting date PLUS: 6 years THEN: Destroy	4/11/2023
Schools - Special Education	1702-	Pupil Accounting Records (obsolete)	The December 1 special education headcount is conducted annually and is reported to the Michigan Department of Education using MiCIS. The EETRK database is used to report early on students for federal funding. The report includes the student's name, building, grade level, UIC code, eligibility code, etc. Supplementary records may include student rosters, resident district summaries, count day process, count day absence log, homebound summaries, transition and work study summaries, clock hours of instruction, audit summaries, etc. Other special education student count reports that are submitted to the Michigan Department of Education or the U.S. Department of Education shall also be retained for 5 years.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools - Early Childhood Education	1800-	At-Risk Student Files	These records document At-Risk programs that are offered to children ages birth to 5. They may include, but may not be limited to applications, individual education plans, evaluations, CA-60 forms, risk factor analyses, and progress reports.	RETAIN UNTIL: Student leaves the program, and does not enroll in kindergarten with the school district PLUS: 7 years THEN: Destroy	4/11/2023
Schools - Early Childhood Education	1801-	Great Start Readiness Program (GSRP) Participant Files	These records document GSRP programs that are offered to children aged 4. They may include, but may not be limited to, applications, individual education plans, evaluations, CA-60 forms, eligibility analyses, and child assessments and parent reports.	RETAIN UNTIL: Student leaves the program, and does not enroll in kindergarten with the school district PLUS: 7 years THEN: Destroy	4/11/2023
Schools - Early Childhood Education	1802-	Early On Student Files	These records document Early On services that are provided to eligible children ages 0-3 who have disabilities, developmental delays, or other special needs. They may include, but may not be limited to, evaluations, referrals, multidisciplinary evaluation team (MET) summaries, Individualized Family Service Plans (IFSP), Individualized Education Program Team (IEPT) reports, progress reports, medical evaluations, psychological records, therapy reports and scripts, releases, permissions, and transition plans.	RETAIN UNTIL: Student leaves the Early On program, and does not enroll in another early childhood program PLUS: 7 years THEN: Destroy	4/11/2023

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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools - Library	1900-	Library Catalog and Circulation Records	These records document the district-wide use of library materials and media equipment, and they identify which items are available for use. They may include, but may not be limited to, item-level catalog information for books and periodicals, individual patron information, and item-level equipment inventories.	RETAIN UNTIL: Item is deaccessioned; or until student graduates, transfers, or withdraws; or until staff employment ends THEN: Destroy	4/11/2023

**State of Michigan
Records Management Services
General Schedule for Michigan Public Schools**

Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Schools - Athletics	2000-	Coach Directory Records	Th These records document coaches who work for the school district. They may include, but may not be limited to, coach names, addresses, phone numbers, and email addresses.	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023
Schools - Athletics	2001-	Coach Handbook Records	These records document the handbook that is provided to all coaches to inform them about policies and procedures that are established by the school district and the Michigan High School Athletic Association (MHSAA).	RETAIN UNTIL: Replaced by a new version THEN: Destroy	4/11/2023
Schools - Athletics	2002-	Student Athlete Files	These records document students who participate in athletics programs. They may include, but may not be limited to, eligibility evaluations, annual consent forms and physical exams, and agreements to comply with the handbooks or rules.	RETAIN UNTIL: Student graduates, or student's expected graduation date THEN: Destroy	4/11/2023
Schools - Athletics	2003-	Student Eligibility Reporting Records	These records document if student athletes continue to be eligible to participate in athletic activities.	RETAIN UNTIL: Fiscal year ends PLUS: 1 year THEN: Destroy	4/11/2023
Schools - Athletics	2004-	Officials' Contract Records	These records document contractual arrangements that are made with game officials who work at athletic events. They may include, but may not be limited to, which event they are working at, and the amount they will be paid for that event.	RETAIN UNTIL: Expiration date PLUS: 6 years THEN: Destroy	4/11/2023
Schools - Athletics	2005-	Season History Records	These records document each athletic season for each team. They may include, but may not be limited to, school, sport, year, competition level, coaches, opponents and scores for each game and tournament, athlete's names and grade levels, team captains, league standings, honors, and school records.	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023
Schools - Athletics	2006-	Athletic Event and Accomplishment Records	These records document athletic events and accomplishments. They may include, but may not be limited to, programs, team photos, and trophies and awards won by varsity teams for major competitions (such as conference, league, or MHSAA championships).	RETAIN UNTIL: School district is dissolved THEN: Transfer to the Archives of Michigan	4/11/2023

**State of Michigan
Records Management Services
General Schedule for Michigan Public Schools**

Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Professional Development	2100-	Curriculum Development Records	These records document the professional development curriculum for school district professionals about prevention, health, literacy, and other issues. Some of these programs are developed by the school district that is offering the program. They may include, but may not be limited to, meeting records, research and data, strategic planning, facilitator or instructor materials, student materials, and evaluations.	RETAIN UNTIL: Course is no longer offered PLUS: 5 years THEN: Destroy	4/11/2023
Professional Development	2101-	Attendance Records	These records document which courses school employees took. They may include, but may not be limited to, attendee names, social security numbers, work and home addresses, sex, race, school districts, counties, phone numbers, mailing list codes, and courses taken.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	4/11/2023
Professional Development	2102-	Course Files	These records document each time a course is offered. They may include, but may not be limited to, expectations and outcomes, registrations, instructor contact information, and continuing education units.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	4/11/2023
Professional Development	2103-	Course Catalog Records	These records document courses that are offered by ISDs. They may include, but may not be limited to, course titles and descriptions, dates, times, locations, presenters, costs, and materials.	RETAIN UNTIL: Date created PLUS: 3 years THEN: Destroy	4/11/2023
Professional Development	2104-	Class Lists and Evaluation Records	These records document who attended each course that was offered and their evaluations of the program.	RETAIN UNTIL: Date created PLUS: 5 years THEN: Destroy	4/11/2023

**State of Michigan
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Department	Item Number	Series Title	Series Description	Retention Period	Approval Date
Community Education	2200-	Community Recreation Records	These records document who registered for community recreation programs, such as pre-school, aquatics, youth and adult enrichment, athletic leagues, etc. They may include, but may not be limited to, names, addresses, phone numbers, payment information, and classes taken.	RETAIN UNTIL: Date created PLUS: 1 year THEN: Destroy	4/11/2023
Community Education	2201-	League Roster Records	These records document the players assigned to each team on various athletic leagues. They may include, but may not be limited to, names, email addresses, and phone numbers.	RETAIN UNTIL: Date created PLUS: 1 year THEN: Destroy	4/11/2023
Community Education	2202-	Certificated Class Records	These records document classes prepare students for certification in CPR, first aid, lifeguard, real estate, health department, etc. They may include, but may not be limited to, exams, answer sheets, pass or fail grades, and personal contact information.	RETAIN UNTIL: Expiration of the certificate THEN: Destroy	4/11/2023
Community Education	2203-	Child Care Records	These records document the children that are enrolled in pre-school and before and after school child care programs. They may include, but may not be limited to, registration information, emergency contact information, immunization and other health information, and field trip permission slips.	RETAIN UNTIL: Child is no longer enrolled in the program PLUS: 1 year THEN: Destroy	4/11/2023
Community Education	2204-	Child Care Billing Records	These records document billing for child care services. They may include, but may not be limited to, personal contact information, enrollment information, and attendance.	RETAIN UNTIL: Child is no longer enrolled in the program PLUS: 1 year THEN: Destroy	4/11/2023



State of Michigan Records Management Services



Record Retention Guide: Michigan Public Schools

This guide accompanies the General Schedule for Michigan Public Schools that was approved 4-11-2023.

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Public Records

The Michigan Freedom of Information Act (FOIA) ([MCL 15.231-15.246](#)) defines public records as recorded information “prepared, owned, used, in the possession of, or retained by a public body in the performance of an official function, from the time it is created.”

Retention and Disposal Schedules

Michigan law (MCL [399.811](#) and [750.491](#)) requires that all public records be listed on an approved Retention and Disposal Schedule that identifies the amount of time that records must be kept to satisfy administrative, legal, fiscal and historical needs. Schedules identify when records may be destroyed, and when certain records should be sent to the [Archives of Michigan](#) for permanent preservation. *Records cannot be destroyed unless their disposition is authorized by an approved Retention and Disposal Schedule.* All schedules are approved by the Records Management Services, the Archives of Michigan, and the State Administrative Board. There are two types of schedules that government agencies may use:

- [General Schedules](#): cover records that are common to a particular type of government agency, such as a public and charter schools, local school districts, public school academies and intermediate school districts. General schedules may not address every single record that a particular agency may have in its possession. *General schedules do not mandate that any of the records listed on the schedule be created.* However, if they are created in the

normal course of business, the general schedule establishes a minimum retention period for them.

- [Agency-Specific Schedules](#): cover records that are that are unique to a particular government agency, and that are not listed on a general schedule. Agency-specific schedules always override general schedules if a record is covered on both types of schedules. Agency-specific schedules only address the records of the agency named on the schedule and may not be used by another agency.

Record Maintenance

Records can exist in a wide variety of formats, including paper, maps, photographs, microfilm, digital images, email messages, databases, etc. The record series listed on this general schedule do not specify the format that the record may exist in, because each school district that follows this schedule may choose to retain its records using different recording media. School districts are responsible for ensuring that all of their records (regardless of format) are properly retained and remain accessible during this entire retention period. All records need to be stored in a secure and stable environment that will protect them from tampering, damage, and degradation. Electronic records are dependent upon specific hardware and software to be accessed and used. It is important to understand that the original technology that is used to create electronic records will eventually become obsolete. As a result, school districts should work with their information technology staff to develop preservation plans for retaining electronic records with long-term (more than 10 years) retention requirements. Various laws (including the Records Reproduction Act, [MCL 24.401-24.406](#)) identify acceptable formats for retaining public records; agencies are responsible for [understanding](#) and complying with these laws.

Suspending Destruction

School districts must immediately cease the destruction of all relevant records (even if destruction is authorized by an approved Retention and Disposal Schedule) if they receive a FOIA request, if they believe that an investigation or litigation is imminent, or if they are notified that an audit, investigation, or litigation has commenced. If relevant records exist in electronic formats (such as email, digital images, word processed documents, databases, backup tapes, etc.), the school district may need to notify its information technology staff. Failure to cease the destruction of relevant records could result in penalties.

Disaster Preparedness and Response

Schools should identify which of their records are vital and need to be protected in case a disaster occurs. A disaster plan is helpful to define how the agency will try to prevent disasters and respond to disasters. If records are completely destroyed during a disaster and are not recoverable, the school should document which records were destroyed, and when/how the destruction occurred. This information should be kept until the destroyed records' retention period is met. If records are damaged (but not destroyed) during a disaster, the school is responsible for recovering those records that have not met their retention period yet. This may require the services of a vendor that specializes in disaster response. An [online guide](#) is available to assist with disaster preparedness and response.

Public Disclosure

Select records series that are listed on this schedule may be exempt from public disclosure, in accordance with the provisions of various state and federal laws. Please consult with your attorney if you need additional information.

Preservation of Historical Records

School districts generate some records that document the history of the school, its employees, and its students. The school district may decide to keep these records on-site in their school library or the administration offices. The Archives of Michigan may take responsibility for preserving historically significant records if a school district dissolves (such as board meeting records, annual reports, etc.). School districts can contact the Archives for assistance at 517-335-2576 or <https://www.michigan.gov/mhc/archives>.

Non-record Material

[General Schedule #1](#) addresses the retention of “non-record” materials. These documents are broadly defined as drafts, duplicates, convenience copies, publications and other materials that do not document agency activities or are not the official source of truth for the agency. These materials can be disposed of when they no longer have reference value to the agency. School districts need to identify the “office of record” when multiple offices possess copies of the same record. The “office of record” is responsible for following the retention period that is specified. Duplicates do not need to be retained. Employees should keep non-record duplicates for the shortest amount of time necessary to satisfy their needs, and not longer than the retention period of the official record. If the official record is destroyed (in compliance with its Retention and Disposal Schedule), any non-record duplicates that still exist remain subject to FOIA and litigation requests. A more comprehensive definition of “non-records” can be found in the approved schedule.

School Election Records

The retention periods for election records are covered by [General Schedule #23](#). School districts only need to retain these records if they are responsible for administering the election.

School Internet Site and Social Media Content

Content published online, including social media postings, do not have a single retention period. The retention period depends upon the content of the document or post. School districts should treat their online publications and postings as duplicates, and they should maintain the official records according to the other items listed on the schedule. Internet technology is not designed to support the preservation of information. Information that is posted online that needs to be retained for more than a few years should be kept in a format and location that supports the retention period.

Student Academic Records

- Personal information about a student may be collected on the CA-60 form/folder, on some other form that is used by the school district, and/or in a student information system/database.
- If a student drops out of school or dies, the records remain active until the expected graduation date, and must be retained in compliance with item #1400A-B.
- Schools remain responsible for retaining these records for the full retention period and they cannot give them to the student upon graduation.
- Schools are responsible for retaining records of students who transfer to another school district until the next school district requests the student's file (MCL 380.1135(4).) School districts may select to retain a copy of the records that are transferred to the other school district, however, they are not required to do so. If they do retain copies, those copies are "[non-records](#)."
- If the school district has a student information system (item #1400A-B) that contains student grades and attendance, the student information system is the official record.
- If a student participates in adult education, cooperative education (such as career and technical education), dual enrollment programs, and/or shared time programs, the applicable records should be retained by the home school district as part of the student academic record. Cooperative education programs must send the student's official records to the student's home district.
- If a child participates in an early childhood education program and remains in the school district, these records will become part of the student's academic record (item #1400A-B).
- Security incidents (see item #900) and security video recordings (see item #903) may meet the criteria of student educational records, and if so, would need to be retained in compliance with item #1400B.

Student Course Work

Students are the owner of the work they produce while taking a class. Some districts allow students to store course work using school-owned storage locations (either paper or electronic). Districts are encouraged adopt a policy about the storage of student course work that defines when it will be deleted (such as at the end of the school year or upon graduation). Students should be notified at the beginning and end of each semester that if they want to keep their course work, they should save it to a storage location that they own before the policy is implemented

Special Education Student Records

34 CFR 300.573 states that schools "shall inform parents when personally identifiable information collected, maintained, or used under this part is no longer needed to provide educational services to the child. (b) The information must be destroyed at the request of the parents. However, a permanent record of a student's name, address, and phone number, his or her grades, attendance record, classes attended, grade level completed, and year completed may be maintained without time limitation."

Dissolved Districts

- If a school district is dissolved and absorbed by another school district(s), the records of the former school district must be transferred to the new district(s) to fulfill the remainder of their retention period.
- Intermediate School Districts may coordinate the retention of, or retain themselves, the records of closed public schools (if the files are not transferred to another open school) for the remainder of their retention period.
- When a public school academy is dissolved by its authorizer, a non-profit corporation or a receiver becomes responsible for compliance with this record Retention and Disposal Schedule for all records (not just student records) of the former public school academy.
- The Archives of Michigan may take responsibility for preserving historically significant records if a school district is dissolved (such as board meeting records, annual reports, etc.). School districts in this situation should contact the Archives for assistance at 517-335-2576 or <https://www.michigan.gov/mhc/archives>.

Records Management Can Help!

State of Michigan Records Management Services is available to assist government agencies with their questions. Agencies may contact the Records Management Services at 517-335-9132 or via email at recordscenter@michigan.gov. Additional information is also available from the Records Management Services' website <http://www.michigan.gov/recordsmanagement/>, including online training, guidance documents, and general schedules.