

NON-INSTRUCTIONAL OPERATIONS

8605

Retention of Charter School Records

In compliance with Idaho Code, the Board of Directors establishes the following guidelines to provide administrative direction pertaining to the retention and/or disposal of Charter School records. This schedule likewise identifies the anticipated physical location where such records may be kept or maintained by the Charter School, in addition to the possible document retention of all categories of records on the school's servers and computer systems.

The Charter School's Office Manager, in conjunction with the Executive Director, or designee, is responsible for the maintenance, safeguarding, and destruction of the Charter School's records. Performance of such duties shall be in cooperation with the Charter School's Business Office, Directors of Maintenance and Transportation, Technology Coordinator, and other administrative personnel employed by the Charter School. However, each school employee is likewise responsible for having knowledge of this policy and the requirement to safeguard the Charter School's records, electronic or otherwise, consistent with the chart below.

The Charter School's Office Manager shall work in conjunction with the Charter School's Technology department to assure that the school's staff is aware of the routine destruction of electronic Charter School records, including emails, such that they are able to assure that the Charter School's public records are retained consistent with this schedule, regardless of whether they are maintained in a hard copy or an electronic copy. In such a process, the Charter School's employees need to retain Charter School records included on the schedule below, particularly student educational records, personnel records, and investigative records, in a format that is not part of the Charter School's routine electronic records destruction and/or notify the technology personnel of the Charter School that a particular document is not to be destroyed as part of the routine destruction of electronic records.

Unless otherwise prohibited by applicable law, all Charter School records may be maintained electronically and/or in hard physical copy.

Method of Destroying Official Records

The Charter School official records, and any copy thereof that may be deemed to be confidential and/or not intended to be disseminated to the public, will be shredded before disposal.

Destruction of Email and Other Electronic Communications

The Charter School will store emails for a maximum period of 7 years. All email will be automatically deleted from the Charter School's system at the end of this retention period. It is the responsibility of every School employee to assure that Charter School documents that need to

be retained for a longer period of time due to federal law, State law, or the provisions of this policy are retained accordingly and in a different format than email. An employee's failure to retain Charter School documents accordingly could serve as a basis for discipline, up to and including possible termination.

School employees and Board Members are directed to retain text messages and other electronic messages related to School business for a period of 5 years.

Suspending Destruction of Official Records

The Charter School will immediately cease the destruction of all relevant records, including electronic records, even if destruction is authorized by an approved Retention Schedule, for the following reasons:

1. If the Charter School receives a public records request;
2. If the Charter School believes that an investigation or litigation is imminent; or
3. If the Charter School is notified that an investigation or litigation has commenced.

The Office Manager and Executive Director are responsible for carrying out this policy.

If relevant records exist in electronic formats (such as email, digital images, word processed documents, databases, backup tapes, etc.) the Executive Director shall notify its information technology staff to cease the destruction of records relating to the subject matter of the suit/potential suit or investigation. Failure to cease the destruction of relevant records could result in penalties against the Charter School.

Alturas Preparatory Academy Charter School records shall be retained and/or disposed of as follows:

SCHOOL RECORDS RETENTION SCHEDULE

Retention Codes		
AC —After closed, terminated, completed, expired, settled, or last date of contact FE —Fiscal Year End (June 30 th)	LA —Life of Asset PM —Permanent US —Until Superseded	CO – Charter Office SB – School Buildings CM –Charter Maintenance CT –Charter Transportation
RECORDS DESCRIPTION	RETENTION PERIOD	
ADMINISTRATION —ATTENDANCE--ANNUAL ATTENDANCE SUMMARIES BY BUILDING	PM	CO, SB
ADMINISTRATION —ATTENDANCE— Enrollment attendance data	3 yr	CO, SB
ADMINISTRATION – Authorizing Entity communications, and agreements	AC + 8 yr	CO
ADMINISTRATION – Charter and all approved amendments; sufficiency review documentation and approvals	PM	CO
ADMINISTRATION – Corporate documents – Articles of Incorporation, Bylaws and any approved amendments to same.	PM	CO
ADMINISTRATION —CONTRACTS FOR THE SALE AND PURCHASE OF REAL PROPERTY	PM	CO
ADMINISTRATION —CONTRACTS AND LEASES	AC +6 yr	CO
ADMINISTRATION —GENERAL CORRESPONDENCE	3 yr	CO, SB
ADMINISTRATION —DONATION/GIFT RECORDS	PM	CO, SB
ADMINISTRATION —BOARD MEETINGS— AGENDA AND MINUTES: Official minutes and agenda of open meetings	PM	CO
ADMINISTRATION —BOARD MEETINGS— CLOSED: Certified agendas or tape recordings of closed meetings	PM—Restricted Access	CO
ADMINISTRATION —ORGANIZATION CHARTS: Any documentation that shows program accountability	PM	CO, SB, CM, CT
ADMINISTRATION – Corporate filings with Idaho Secretary of State’s Office	PM	CO
ADMINISTRATION —EDUCATION PROGRAM REVIEW RECORDS	AC+3 yr	CO, SB
ADMINISTRATION —OFFICIAL STATE DEPARTMENT AND PUBLIC CHARTER COMMISSION REPORTS	PM	CO
ADMINISTRATION —SCHOOL CERTIFICATION REPORTS	PM	CO
ANNUAL REPORTS	PM	CO
ANNUAL REPORTS – Performance Certificate	PM	CO

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RECORDS DESCRIPTION	RETENTION PERIOD	
APPEAL AND REVIEW RECORDS —Records may include but are not limited to narrative history or description of appeal; minutes and testimony; exhibits; reports and findings of fact; final orders, opinions, conclusions, or decisions; audio recordings; hearing schedules and lists of participants; and related correspondence and documentation.	PM	CO
BOARD MEMBER RECORDS —Series documents Board activities and serves as a reference source for Board members. Records may include but are not limited to correspondence, plans, statements of goals and objectives, budgets, financial statements, reports, other reference material. Records are often compiled in a notebook or electronically for each member.	AC+3 yr NOTE: Some materials may warrant long-term retention. These materials should be reviewed for archival materials.	CO
BOARD RECORDS —Series documents the official proceedings of the board meetings. Records may include meeting notices; items for Board action; Board packets, policies for approval, contested case hearings schedules; committee reports; exhibits; and related correspondence and documentation. Records may also include audio recordings of meetings used to prepare summaries.	PM	CO
COMPUTER SYSTEMS-BACKUPS —Backups on tape, disk, CD, DVD, etc. CAUTION: Records stored in this format can be subpoenaed during litigation.	US or 1 year	CO
EQUIPMENT-HISTORY FILE —Equipment service agreements, includes maintenance agreements, installation, and repair logs, etc.	LA+3 yr	CO, CM, CT
EQUIPMENT MANUALS —Instruction and operating manuals	LA	CO, SB, CM, CT
EQUIPMENT WARRANTIES	AC+1 yr	CO, SB, CM, CT
FACILITIES OPERATIONS-APPRAISALS —Building or property	3 yr	CO
FACILITIES OPERATIONS-BUILDINGS PLANS AND SPECIFICATIONS —Includes architectural and engineering drawings, etc.	PM For leased structures retain AC+2	CO, CM
FACILITIES OPERATIONS-BUILDINGS, CONSTRUCTION CONTRACT, INSPECTION RECORDS AND PROJECT FILES —Building construction contracts, surety bonds and inspection records, Planning, design, construction records, and all bids, etc.	LA	CO, SB, CM

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RECORDS DESCRIPTION	RETENTION PERIOD	
FACILITY OPERATIONS—DAMAGE REPORTS; LOST AND STOLEN PROPERTY REPORTS	FE+3 yr	CO, SB, CM, CT
FACILITY OPERATIONS-PROPERTY DISPOSAL RECORDS —Documenting disposal of inventoried property	PM	CO
FACILITY OPERATIONS-PROPERTY MANAGEMENT SEQUENTIAL NUMBER LOGS —Property logs	US+3 yr	CO, SB, CM
FACILITY OPERATIONS-SECURITY ACCESS RECORDS —Documents the issuance of keys, identification cards, passes, passwords, etc.	AC+2 yr AC=Until superseded, date of expiration, or date of termination, whichever is sooner	CO, SB, CM
FACILITY OPERATIONS-SURPLUS PROPERTY SALE REPORTS	PM	CO, CM
FACILITY OPERATIONS-UTILITY USAGE REPORTS	1 yr	CO, CM
FACILITY OPERATIONS-VEHICLE OPERATION LOGS	1 yr	CO, CT
FISCAL-ACCOUNTS PAYABLE/RECEIVABLE LEDGERS	FE+3 yr	CO, SB
FISCAL-ANNUAL FINANCIAL REPORTS	PM	CO, SB, CM, CT
FISCAL-RESERVE ACCOUNT INVESTMENT STATEMENTS	FE+4 yr	CO
FISCAL-ANNUAL OPERATING BUDGETS AND APPROVED REVISIONS	FE+3 yr	CO, SB, CM, CT
FISCAL-APPROPRIATION REQUESTS —Includes any supporting documentation in the appropriation request	FE+3 yr	CO, SB, CM, CT
FISCAL-FINAL AUDIT REPORTS	PM	CO, SB
FISCAL-BANK STATEMENTS	FE+3 yr	CO, SB
FISCAL—PAYMENT RECORDS AND SUMMARIES	FE+2 yr	CO, SB, CM, CT
FISCAL-CANCELLED CHECKS —Stubs/Warrants/Drafts	FE+3 yr	CO, SB
FISCAL-CAPITAL ASSET RECORDS	LA+3 yr	CO, SB, CM, CT
FISCAL-CASH RECORDS —Cash deposit slips; cash receipts log	FE+3 yr	CO, SB
FISCAL-DEEDS AND EASEMENTS —Proof of ownership and right-of-way on property	PM	CO
FISCAL-detail chart of accounts —One for all accounts in use for a fiscal year	FE+3 yr	CO, SB
FISCAL-EXPENDITURE JOURNAL OR REGISTER	FE+3 yr	CO, SB

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FISCAL-EXPENDITURE VOUCHERS —Travel, payroll, etc.	FE+3 yr	CO, SB, CM, CT
FISCAL-EXTERNAL REPORTS —Special purpose, i.e. federal financial reports, salary reports, etc.	AC+6 yr AC= Termination of employment	CO, SB, CM, CT
FISCAL-FEDERAL TAX RECORDS —Includes FICA records	PM	CO
FISCAL-FEDERAL FUNDING RECORDS —Title I; Chapter 2; IDEA Part B	FE+5 yr Or until all pending audits or reviews are completed	CO
FISCAL —FEDERAL—USDA	AC+3 yr AC=submission of final expenditure	CO
FISCAL-GENERAL LEDGERS; GENERAL JOURNAL VOUCHERS	FE+3 yr	CO, SB
FISCAL-GRANTS —State and Federal	AC+3 yr AC=End of grant or satisfaction of all uniform administrative requirements for the grant CAUTION: Retention requirements may vary depending on the specific federal funding agency	CO, SB
FISCAL-INSURANCE CLAIM FILES	AC+3 yr AC=Resolution of claim	CO
FISCAL-INSURANCE POLICIES —all types	AC+6 yr AC=expiration or termination of policy according to its terms	CO
FISCAL-LONG-TERM LIABILITY RECORDS —Bonds, etc	AC+4 yr AC=retirement of debt	CO
FISCAL – All Tax Exempt filings for non-profit Corporate Status, including all documentation submitted to obtain non-profit corporate status.	PM	CO
FISCAL-RECEIPTS JOURNAL OR REGISTER	FE+3 yr	CO, SB, CM, CT
FISCAL-RECONCILIATIONS	FE+3 yr	CO, SB
FISCAL-REIMBURSABLE ACTIVITIES —Requests and approval for reimbursed expenses for travel, training, etc.	FE+3 yr	CO, SB
FISCAL-RETURNED CHECKS —Uncollectable warrants or drafts	AC+3 yr AC=After deemed uncollectible	CO, SB

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RECORDS DESCRIPTION	RETENTION PERIOD	
FISCAL-SIGNATURE AUTHORIZATIONS —Records authorizing an employee to initiate financial transactions for agency. Also, spending authority limits	US+FE+3 yr	CO
LEGAL-LITIGATION FILES--	PM CAUTION: May contain attorney-client privileged information	CO, SB, CM, CT
LEGAL-OPEN RECORDS REQUESTS —documentation relating to approved or denied requests for records under Idaho Public Records Law	PM	CO
LEGAL-OPINIONS AND ADVICE —Does not include legal opinions or advice rendered on a matter in litigation or with regard to pending litigation	PM CAUTION: May contain attorney-client privileged information	CO, SB
INSTRUCTIONAL —Distance learning instruction that is recorded by the School. Such recording is not required by this policy.	Until one month following the end of the semester/trimester.	Electronic
INSTRUCTIONAL —Records on annual cumulative effect use of copyrighted materials and proof of permission to use copyrighted materials	5 years after last use.	SB
NEWS OR PRESS RELEASES	PM	CO, SB
PERSONNEL-ACCUMULATED LEAVE ADJUSTMENT REQUEST —Used to create and adjust employee leave balances	AC+6 yr AC=Termination of employment	CO, SB, CM, CT
PERSONNEL-APPLICATIONS FOR EMPLOYMENT—HIRED —Applications, etc. required by employment advertisement	AC+5 yr AC=Termination of employment	CO, SB, CM, CT
PERSONNEL-APPLICATIONS FOR EMPLOYMENT—NOT HIRED —Applications, resumes, etc. required by employment advertisement	AC+2 yr AC=Date position is filled	CO, SB, CM, CT
PERSONNEL-BENEFIT PLANS	PM if current, US+6 yr	CO
PERSONNEL-COMPLAINT RECORDS —Complaints received and records documenting their resolution	FE+3 yr CAUTION: If a complaint becomes the subject of litigation, it is subject to a longer retention period	CO, SB, CM, CT

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RECORDS DESCRIPTION	RETENTION PERIOD	
PERSONNEL-CORRECTIVE ACTION —those actions which do not affect pay, status, or tenure and are imposed to correct or improve job performance	PM CAUTION: If during the retention period these records are used to support personnel disciplinary action, the records should be retained according to Personnel Disciplinary Action series.	CO, SB, CM, CT
PERSONNEL-DISCIPLINARY ACTION DOCUMENTATION —those actions that affect pay or status. They include demotion, dismissal, etc.	PM	CO, SB, CM, CT
PERSONNEL-EMPLOYEE STATEMENTS (Affidavits)—for insurance, personnel or other uses for which administration has sought such statements	PM	CO, SB, CM, CT
PERSONNEL-EMPLOYEE BENEFITS —documents relating to selection of benefits other than insurance	AC+6 yr AC= Termination of employment	CO
PERSONNEL-EMPLOYEE COUNSELING RECORDS —Notes, etc. relating to job-specific counseling	PM	CO, SB, CM, CT
PERSONNEL-EMPLOYEE DEDUCTION AUTHORIZATIONS —documents relating to all deductions of pay	AC+5 yr AC=After termination of employee or after amendment, expiration, or termination of authorization, whichever is sooner.	CO
PERSONNEL-EMPLOYEE EARNINGS RECORDS	PM	CO
PERSONNEL-EMPLOYEE INSURANCE RECORDS —School copy of selection records by employees of insurance offered by the School	AC+6 yr if current AC= Termination of employment, US+ 5 yr	CO
PERSONNEL-EMPLOYEE RECOGNITION RECORDS —Awards, incentives, etc.	PM	CO, SB, CM, CT
PERSONNEL-EMPLOYMENT ANNOUNCEMENT	2 yr	CO
PERSONNEL-EMPLOYMENT CONTRACTS	Original dates of hire +50 yr	CO
PERSONNEL-EMPLOYMENT ELIGIBILITY —Documentation or verification of Federal report form INS I-9	PM	CO
PERSONNEL-EMPLOYMENT SELECTION RECORDS —all records that document the selection process: i.e. polygraph, physicals, interview notes, etc.	5 yr CAUTION: Does not include criminal history checks	CO, SB, CM, CT

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PERSONNEL-FORMER EMPLOYEE VERIFICATION RECORDS —minimum information includes name, social security number, exact dates of employment and last known address	PM	CO
PERSONNEL-GRIEVANCE RECORDS —review of employee grievances against policies and working conditions, etc. Includes record of actions taken.	PM	CO, SB, CM, CT
PERSONNEL-HIRING PROCESS—CRIMINAL HISTORY CHECKS —criminal history record information on job applications	PM	CO
PERSONNEL-JOB PROCEDURE RECORD/JOB DESCRIPTION —any document detailing duties of positions on position-by-position basis	US+8 yr	CO, SB, CM, CT
PERSONNEL-LEAVE STATUS REPORT —cumulative report for each pay cycle showing leave status	FE+3 yr	CO
PERSONNEL-LIABILITY RELEASE FORM —statements of employees, patrons, etc. who have released the School from liability	PM	CO
PERSONNEL-LICENSE AND DRIVING RECORD CHECK	PM	CO, CT
PERSONNEL-OVERTIME AUTHORIZATION & SCHEDULE	5 yr	CO, SB, CM, CT
PERSONNEL-PAYROLL-DIRECT DEPOSIT APPLICATION/AUTHORIZATION	AC+6 yr if current AC= Termination of employment US+3 yr	CO
PERSONNEL-PAYROLL-INCOME ADJUSTMENT AUTHORIZATION ---used to adjust gross pay, FICA, retirement or compute taxes	AC+6 yr if current AC= Termination of employment US+3 yr	CO
PERSONNEL-PAYROLL-Garnishment agreements and related revisions	AC+3 yr AC= Termination of employment	CO
PERSONNEL-PERFORMANCE EVALUATION	PM	CO, SB, CM, CT
PERSONNEL-PERSONNEL ENROLLMENT FILE	PM	CO
PERSONNEL-PERSONNEL RECORD OF HOURS WORKED —Irregular help, half-time or greater	Date of hire +50 yr	CO
PERSONNEL-PERSONNEL TERMINATION RECORD	PM	CO
PERSONNEL-PERSONNEL INFORMATION —documents that officially change pay, titles, benefits, etc.	PM	CO

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RECORDS DESCRIPTION	RETENTION PERIOD	
PERSONNEL-POLICY AND PROCEDURES MANUAL —any manual, etc. that establishes standard employment procedures	PM	CO, SB, CM, CT
PERSONNEL-RESUME-UNSOLICITED	1 yr	CO, SB, CM, CT
PERSONNEL-SICK LEAVE POOL DOCUMENTATION —requests submitted, approvals, number of hours transferred in an out, etc.	LA+3 yr	CO
PERSONNEL-TIME CARD AND TIME SHEET	PM	CO, SB, CM, CT
PERSONNEL-TIME OFF AND/OR SICK LEAVE REQUEST	5 yr	CO, SB, CM, CT
PERSONNEL-TRAINING AND EDUCATIONAL ACHIEVEMENT RECORD-INDIVIDUAL —records documenting training, testing, or continued education	PM	CO, SB, CM, CT
PERSONNEL-UNEMPLOYMENT CLAIM RECORD	5 yr	CO
PERSONNEL-UNEMPLOYMENT COMPENSATION RECORDS	AC+5 yr	CO
PERSONNEL-W-2 & W-4 FORMS	5 yr from date of termination	CO
PERSONNEL—WORKER’S COMPENSATION POLICIES	AC+10 yr AC=expiration of policy	CO
PROCUREMENT-PERFORMANCE BOND —bonds posted by individuals or entities under contract with School	PM	CO
PROCUREMENT-PURCHASING LOG —Log, etc. providing a record of purchase orders issued, orders received, etc.	FE+3 yr	CO, SB, CM, CT
PROCUREMENT-BID DOCUMENTATION —includes bid requisition/authorizations, invitation to bid, bid specifications, and evaluations	FE+3 yr CAUTION: If a formal written contract is the result of a bid, etc., the bid and its supporting documentation must be retained for the same period as the contract.	CO, CM, CT
RECORDS MANAGEMENT—RECORDS RETENTION SCHEDULE; DISPOSITION LOG (listing records destroyed or transferred); CONTROL MATERIALS (indexes, card files, etc.); DESTRUCTION APPROVAL SIGN-OFFS	PM	CO, SB, CM, CT
SAFETY-ACCIDENT REPORTS	8 yrs* For Minors, 8 yrs after minor reaches age of 18	CO, SB, CM, CT

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RECORDS DESCRIPTION	RETENTION PERIOD	
SAFETY- OCCUPATIONAL INJURY RECORDS	AC+3 yr AC= Termination of employment	CO, SB, CM, CT
SAFETY-DISASTER PREPAREDNESS AND RECOVERY PLANS	PM	CO, SB, CM, CT
SAFETY-EVACUATION PLANS	PM	CO, SB
SAFETY-FIRE ORDERS —issued by fire marshal to correct deficiencies in compliance with the fire code	AC+6 yr AC=deficiency corrected	CO, SB, CM
SAFETY-HAZARDOUS MATERIALS DISPOSAL RECORDS —Material safety data sheets must be kept for those chemicals currently in use that are affected by the Hazard Communication Standard in accordance with 29 CFR § 1910.1200(g).	PM	CO, CM
SAFETY-INCIDENT REPORTS —Reports concerning incidents which, upon investigation, were of a non-criminal nature	6 yr (or 30 yr*) *Exposure records require 30 year retention per 29 CFR § 1910.1020(d)(ii)(B)Footnote(1)	CO, SB, CM, CT
SAFETY-INSPECTION RECORDS —Fire, safety, and other inspection records of facilities and equipment	AC+6 yr AC=Date of the correction of the deficiency, if the inspection report reveals a deficiency.	CO, SB, CM
SAFETY-MATERIAL DATA SAFETY SHEETS	30 yrs after the end of use of the substance	CO, CM
SAFETY-WORKPLACE CHEMICAL LISTS	30 yr	CO, SB, CM
STUDENTS – Lottery process records including advertisements and notices, submitted student lottery requests and lottery results.	FE + 8 yr	CO, SB
STUDENTS-EDUCATION RECORDS —Students’ name, birth date, last address, dates of attendance, graduation date and grades earned	As described in Procedure 3570P.	CO, SB
STUDENTS-SPECIAL EDUCATION RECORDS — educational records, including eligibility documentation and IEPs	FE+6 yr except as specified in Policy 3570P	CO, SB
STUDENTS-MEDICAID RECORDS -claims, reimbursements, and supporting documentation	FE +5 yr	CO, SB
VEHICLE-INSPECTION, REPAIR AND MAINTENANCE RECORDS	LA+1 yr	CO, CT
VEHICLE-TITLE AND REGISTRATION	1 yr	CO, CT

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RECORDS DESCRIPTION	RETENTION PERIOD	
VOLUNTEER RECORDS —records may include recruitment and selection records, volunteer personnel and intern personnel information forms, intern agreements, volunteer and intern time records, emergency notification forms, insurance documentation and correspondence	AC+3 yr AC=End of term of volunteer or intern	CO, SB
WEBSITE/WEB PAGES — INTERNET/INTRANET—system development documentation for initial setup; subsequent changes and content of pages	PM	CO, SB

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

Cross References:	2150P 3570 3570P	Copyright Compliance Student Records Student Records
Legal References:	IC § 33-508 IC § 33-701(8) IC § 56-209h IC § 67-4131 IC § 74-101 IC § 74-119	Duties of Clerk Fiscal Year—Payment and Accounting of Funds Administrative Remedies Records Management Services—Rules, Guidelines, Procedures Definitions Agency Guidelines
Other References:	State Board of Education - Agency Specific Records Retention Schedule of the Records Management Guide, Idaho Records Center SDE Idaho Special Education Manual, current edition	

Policy History:

Adopted on: July 19, 2023

Revised on:

Reviewed on: