

# DEPARTMENT OF EDUCATION

Approved Records Retention and Disposition Schedules (Forms SA-1)  
Compiled by the DAGS, Archives Division, Records Management Branch\*

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\*RECORDS SERIES ID is for Records Management Branch use only.



**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
OFFICE OF THE SUPERINTENDENT**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	MINUTES OF MEETINGS OF THE BOARD OF EDUCATION	SA-1 DATED 9/12/1985, ITEM S-1	Permanent	May transfer to State Archives after 1 year.
	INDEX TO BOE MINUTES.	SA-1 DATED 9/12/1985, ITEM S-2	Permanent	
	TAPES OF MINUTES.	SA-1 DATED 9/12/1985, ITEM S-3		Destroy 1 year after transcribed.
	ANNUAL REPORT OF THE DEPARTMENT OF EDUCATION.	SA-1 DATED 9/12/1985, ITEM S-4	Permanent	Retain 1 copy in Master File. Submit 1 copy to the State Archives.
	SPECIAL REPORTS ON PROJECTS OF THE DEPARTMENT.	SA-1 DATED 9/12/1985, ITEM S-5	Permanent	Retain 1 copy in Master File. Submit 1 copy to the State Archives.
	SUPERINTENDENT'S CENTRAL FILES (A) SUSPENSE FILE	SA-1 DATED 9/12/1985, ITEM S-6 (a)		Destroy when approved copy returned.
	SUPERINTENDENT'S CENTRAL FILES (B) REFERENCE FILE	SA-1 DATED 9/12/1985, ITEM S-6 (b)		Destroy 1 year old.
	SUPERINTENDENT'S CENTRAL FILES (C) DAY FILE	SA-1 DATED 9/12/1985, ITEM S-6 (c)		Destroy 1 year old.
	SUPERINTENDENT'S CENTRAL FILES (D) CORRESPONDENCE (follow file guide and subject headings list).	SA-1 DATED 9/12/1985, ITEM S-6 (d)	Permanent	May transfer to State Archives after 1 year old.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
OFFICE OF THE BUSINESS SERVICES, INFORMATION SYSTEMS BRANCH**

Records Series ID	Description	Schedule Information	Retention	Disposition
	FEDERAL SURVEY CARDS (FEDERAL IMPACT AID), 1985 – present.	SA-1 DATED 9/14/1990	5 years after the end of the fiscal year for which the funds were received. If records have been questioned on Federal audit or review, until the question is resolved.	Retain in office for 1 year after the end of the fiscal year for which the federal funds were received. May transfer to State Records Center for balance of 4 years of retention. Notify agency prior to records destruction.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
OFFICE OF INSTRUCTIONAL SERVICES**

Records Series ID	Description	Schedule information	Retention	Disposition
	<p>SPECIAL EDUCATION PROGRAM PLACEMENT CONFIDENTIAL RECORDS.</p> <p>(a) Documentation to be maintained for the duration of person's activity in program. May include:</p> <ul style="list-style-type: none"> <li>(1) Pre-placement evaluation.</li> <li>(2) Official evaluation for Program Placement (Form 46).</li> <li>(3) Parental Conference and Consent for Program Placement (Form 48)</li> <li>(4) Individualized Education Program</li> <li>(5) Consents for Services and Release of Information</li> <li>(6) Correspondence and Documentation re to: parental conferences, hearings, administrative review, civil action.</li> </ul> <p>(b) Evaluations, Assessments, Reports upon which official Evaluation for Placement is Based</p> <ul style="list-style-type: none"> <li>(1) Comprehensive Summaries of Evaluations and Reports.</li> <li>(2) Assessments/Evaluations. May include: Medical Assessments, Psychological Assessment, Family and Social History, Speech Assessment, Audiological Assessment, Classroom Assessment</li> <li>(3) Routine Correspondence relative to the assessment process, such as requests for data from outside agencies, scheduling of assessments, etc.</li> </ul>	SA-1 DATED 6/5/1986	Retain until child's 22 <sup>nd</sup> birthday or upon parental request with Department consent.	Destroy after cited retention.
	INTELLECTUAL ASSESSMENT TEST RECORDS AND SUPPORTING MATERIAL, 1951-present.	SA-1 DATED 12/21/1971	2 years after graduation or withdrawal or 20 years after birth.	Destroy after cited retention.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
OFFICE OF HUMAN RESOURCES**

Records Series ID	Description	Schedule information	Retention	Disposition
	PERSONNEL RECORDS OF TEACHERS AND EDUCATIONAL OFFICERS, INCLUDING BOUND VOLUMES, 1973 to present.	SA-1 DATED 5/23/2005, ITEM 1	30 years after termination, resignation or retirement.	Closed inactive records may be stored in the State Records Center. Destroy after cited retention.
	PERSONNEL RECORDS OF SUBSTITUTE TEACHERS, INCLUDING BOUND VOLUMES.	SA-1 DATED 5/23/2005	10 years after termination.	Closed inactive records may be stored in the State Records Centers. Destroy after cited retention.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
ADMINISTRATIVE DISTRICT OFFICES**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	APPLICATION FOR HIGH SCHOOL DIPLOMA, Form A.E. 25, 1946-present.	SA-1 DATED 4/5/1972, ITEM 1		Microfilm 8 years after attainment of diploma & destroy original records.
	G.E.D. OFFICIAL TEST SCORES OR TEST WORK SHEETS, 1946-present.	SA-1 DATED 4/5/1972		Microfilm 8 years after attainment of diploma & destroy original records.
	HIGH SCHOOL OR OTHER TRANSCRIPTS, 1946-present.	SA-1 DATED 4/5/1972		Microfilm 8 years after attainment of diploma & destroy original records.
	COURSE COMPLETION CARDS, FORM A.E. 31, 1946-present.	SA-1 DATED 4/5/1972		Microfilm 8 years after attainment of diploma & destroy original records.
	REPORT OF LOSS OR DAMAGE TO STATE-OWNED PROPERTY, FORM DOE E-9	SA-1 DATED 1/29/1979		DAA.

DAA = Destroy 1 month after post-audit or 5 years after end of fiscal year, whichever is shorter; except that at least 20 days written notice will be given to State Comptroller before unaudited records are destroyed. Records subject to Federal audit will not be destroyed before such audit, unless authorized by Federal regulation.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
ADMINISTRATIVE DISTRICT OFFICES**

Records Series ID	Description	Schedule information	Retention	Disposition
	STUDENT HEALTH RECORDS MAINTAINED BY THE DEPT. OF EDUCATION IN COOPERATION WITH DEPT. OF HEALTH, FAMILY HEALTH SERVICES DIVISION, SCHOOL HEALTH BRANCH. STANDARD STUDENT ACCIDENT REPORT (COPY).	SA-1 DATED 8/31/1979	Office of Business Services, School Security and Safety – until no longer useful after summarized.  District Offices – 2 years.  Principal's Office – 5 years.	Destroy after cited retention.
	STUDENT HEALTH RECORDS MAINTAINED BY THE DEPT. OF EDUCATION IN COOPERATION WITH DEPT. OF HEALTH, FAMILY HEALTH SERVICES DIVISION, SCHOOL HEALTH BRANCH. SCHOOL INSPECTION CHECKLIST.	SA-1 DATED 8/31/1979	Principal's Office – until superseded, outdated or no longer of use.	Destroy after cited retention.
	STUDENT HEALTH RECORDS MAINTAINED BY THE DEPT. OF EDUCATION IN COOPERATION WITH DEPT. OF HEALTH, FAMILY HEALTH SERVICES DIVISION, SCHOOL HEALTH BRANCH. HEALTH HISTORY CHECKLIST.	SA-1 DATED 8/31/1979	Counselor's Office, Intermediate & High Schools Teacher, Elementary School – until superseded.	Destroy after cited retention.
	STUDENT HEALTH RECORDS MAINTAINED BY THE DEPT. OF EDUCATION IN COOPERATION WITH DEPT. OF HEALTH, FAMILY HEALTH SERVICES DIVISION, SCHOOL HEALTH BRANCH. HEALTH CENTER CARD.	SA-1 DATED 8/31/1979	2 years after child passes last grade level at school. Need not use this form for either Health Room Card or Health Room Log is used.	Destroy after cited retention.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
ADMINISTRATIVE DISTRICT OFFICES**

Records Series ID	Description	Schedule information	Retention	Disposition
	AUTHORIZATION TO OPEN CLASSES, FORM AE 1.	SA-1 DATED 12/10/1980, ITEM 1	1 month after past audit or 5 years after end of fiscal year, whichever is shorter; except that at least 20 days written notice will be given to the State Comptroller before unaudited records are destroyed. Records subject to Federal Audit will not be destroyed before such audit, unless authorized by Federal regulation.	Destroy after cited retention.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
ADMINISTRATIVE DISTRICT OFFICES**

Records Series ID	Description	Schedule information	Retention	Disposition
	TEACHER REPORT FOR ATTENDANCE, FORM AE 2.	SA-1 DATED 12/10/1980, ITEM 2	1 month after past audit or 5 years after end of fiscal year, whichever is shorter; except that at least 20 days written notice will be given to the State Comptroller before unaudited records are destroyed. Records subject to Federal Audit will not be destroyed before such audit, unless authorized by Federal regulation.	Destroy after cited retention.
	STUDENT REGISTRATION FORM, AE 3.	SA-1 DATED 12/10/1980, ITEM 3	1 month after past audit or 5 years after end of fiscal year, whichever is shorter; except that at least 20 days written notice will be given to the State Comptroller before unaudited records are destroyed. Records subject to Federal Audit will not be destroyed before such audit, unless authorized by Federal regulation.	Destroy after cited retention.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
SCHOOLS**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	STUDENT BODY COMMITTEE REPORTS, MINUTES AND YEARLY SUMMARIES.	SA-1 DATED 1/6/1984, ITEM 61	3 years.	Destroy after cited retention.
	ANNOTATED BALLOTS.	SA-1 DATED 1/6/1984, ITEM 62	1 year.	Destroy after cited retention.
	SCHOOL REGISTERS OF (PUPIL) ATTENDANCE.	SA-1 DATED 1/6/1984, ITEM 6	5 years.	Destroy after cited retention.
	TEACHERS' INDIVIDUAL FOLDERS.	SA-1 DATED 1/6/1984, ITEM 8		Transfer with teacher. Give to teacher upon termination.
	STUDENTS' TRACER CARDS, FORM 12A, 13A.	SA-1 DATED 1/6/1984, ITEM 47		Destroy 1 year after student leaves school.
	ROSTERS OF SCHOOL DROPOUTS.	SA-1 DATED 1/6/1984, ITEM 53		Retain until student attains age 20.
	REQUEST FOR REPLACEMENT OR ADDITIONAL LARGE EQUIPMENT, FORM SL-18.	SA-1 DATE 11/7/1983, ITEM 1		DAA.
	ACCOUNT PAYABLE FORM, SL-3A.	SA-1 DATE 11/7/1983, ITEM 2		DAA.
	REPORT OF FOODS/SUPPLIES USED FOR EMERGENCY FEEDING, FORM SL-4F.	SA-1 DATE 11/7/1983, ITEM 3		DAA.
	CERTIFICATE, FORM SL-5A(11).	SA-1 DATE 11/7/1983, ITEM 4		DAA.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
SCHOOLS**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	CERTIFICATE, FORM SL-5A(111.)	SA-1 DATED 11/7/1983, ITEM 5		DAA.
	ALLOCATIONS FOR FEDERAL COMMODITIES.	SA-1 DATED 11/7/1983, ITEM 6		DAA.
	APPLICATION FOR FREE MEALS / MILK.	SA-1 DATED 11/7/1983, ITEM 7		DAA.
	SERVING KITCHEN DAILY RECORDS.	SA-1 DATED 11/7/1983, ITEM 8		DAA.
	MENU PLANNING WORKSHEET.	SA-1 DATED 11/7/1983, ITEM 9		DAA.
	REQUEST FOR SCHOOL LUNCH SERVICES, EQUIPMENT, REPAIR AND SUPPLIES, FORM SL-2, 1967-present.	SA-1 DATED 6/12/1974, ITEM 1		DAA.
	REQUEST FOR REPLACEMENT OR ADDITIONAL "C" EQUIPMENT, FORM SL-1A, 1967-present.	SA-1 DATED 6/12/1974, ITEM 2		DAA.
	PURCHASE REQUISITION, FORM SL-2, 1967- present.	SA-1 DATED 6/12/1974, ITEM 3		DAA.
	INVOICE TRANSMITTAL FORM, FORM SL-3, 1967- present.	SA-1 DATED 6/12/1974, ITEM 4		DAA.
	PERPETUAL INVENTORY CARDS, FORM SL-4A, 1967- present	SA-1 DATED 6/12/1974, ITEM 5		DAA.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
SCHOOLS**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	MONTHLY INVENTORY OF FEDERAL COMMODITIES, FORM SL-4A, 1967 to present.	SA-1 DATED 6/12/1974, ITEM 6		DAA.
	TRANSFER OF DONATED USDA COMMODITIES, FORM SL-4B, 1967-present.	SA-1 DATED 6/12/1974, ITEM 7		DAA.
	DISTRIBUTION ANNOUNCEMENT, FORM SL-4C, 1967 to present.	SA-1 DATED 6/12/1974, ITEM 8		DAA.
	FORM FOR REPORTING LOSS OR DAMAGE TO FEDERAL COMMODITIES, FORM SL-4D, 1967-present.	SA-1 DATED 6/12/1974, ITEM 9		DAA.
	MONTHLY ORDERS FROM STATE RESERVE ACCOUNT, FORM SL-4E, 1967-present.	SA-1 DATED 6/12/1974, ITEM 10		DAA.
	COMPUTATION OF DAILY/MONTHLY LUNCH TRANSACTION, FORM SL-5, 1967-present.	SA-1 DATED 6/12/1974, ITEM 11		DAA.
	CERTIFICATE, FORM SL-5A, 1967-present.	SA-1 DATED 6/12/1974, ITEM 12		DAA.
	SCHOOL LUNCH MONTHLY RECORD AND CLAIM FORM, SL-6, 1967-present.	SA-1 DATED 6/12/1974, ITEM 13		DAA.
	WORKSHEET FOR REPORTING LOSS OR DAMAGE TO PURCHASED FOOD AND SUPPLY, FORM SL-8, 1967-present.	SA-1 DATED 6/12/1974, ITEM 14		DAA.
	FORM FOR REPORTING LOSS OR DAMAGE TO PURCHASED FOOD AND SUPPLY, FORM SL-8, 1967-present.	SA-1 DATED 6/12/1974, ITEM 15		DAA.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
SCHOOLS**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	MONTHLY REPORT OF FOREIGN PRODUCTS PURCHASED, FORM SL-9, 1967-present.	SA-1 DATED 6/12/1974, ITEM 16		DAA.
	PAYROLL EXPLANATORY SHEETS FOR SUBSTITUTES USED FOR PAYROLLS.	SA-1 DATED 9/10/1973, ITEM 1.		DAA.
	BUREAU OF WORKER'S COMPENSATION FORMS	SA-1 DATED 9/10/1973, ITEM 2.		Destroy 1 year after final payment and DAA.
	PRINCIPALS' MONTHLY AND ANNUAL FINANCIAL REPORTS.	SA-1 DATED 9/10/1973, ITEM 3.	Retain a master set.	Destroy copies when no longer needed for administrative purposes.
	MINUTES OF THE FINANCE COMMITTEES AND THE ATHLETIC BOARDS.	SA-1 DATED 9/10/1973, ITEM 4.		DAA.
	APPLICATION FOR THE USE OF AUDITORIUM, CLASSROOMS, PLAYGROUND, ETC.	SA-1 DATED 9/10/1973, ITEM 5.		DAA.
	PAID INVOICES AND STATEMENTS WITH DOE PURCHASE ORDERS, SCHOOL DISBURSEMENT RECORDS, JOURNAL VOUCHERS AND DUPLICATE VOUCHER CHECKS FOR PURCHASES PAID BY NON-APPROPRIATED FUNDS.	SA-1 DATED 9/10/1973, ITEM 6		DAA.
	CHECK REGISTERS.	SA-1 DATED 9/10/1973, ITEM 7.		DAA.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
SCHOOLS**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	SCHOOL SALES INVOICES AND CERTIFIED BILLS FOR COLLECTION.	SA-1 DATED 9/10/1973, ITEM 8.		DAA.
	DUPLICATE VOUCHER CHECKS.	SA-1 DATED 9/10/1973, ITEM 9.		DAA.
	PURCHASE ORDER BOOKS (TRIPLICATE).	SA-1 DATED 9/10/1973, ITEM 10.		DAA.
	RECEIPTS AND DISBURSEMENTS JOURNALS AND LEDGERS.	SA-1 DATED 9/10/1973, ITEM 11.		DAA.
	PURCHASE ORDER AND INVOICES (APPROPRIATED AND TRUST FUNDS).	SA-1 DATED 9/10/1973, ITEM 12.		DAA.
	DAILY RECAPITULATION SUMMARIES OF RECEIPTS AND DISBURSEMENTS.	SA-1 DATED 9/10/1973, ITEM 13.		DAA.
	RECEIPTS FOR COLLECTIONS THROUGH SCHOOL BUSINESS OFFICES.	SA-1 DATED 9/10/1973, ITEM 14.		DAA.
	SUBSIDIARY RECEIPTS USED BY TEACHERS FOR CLASSROOM COLLECTIONS.	SA-1 DATED 9/10/1973, ITEM 15.		DAA.
	STUDENTS' FINANCIAL CARDS OF PAYMENTS FOR STUDENTS' DUES, ETC.	SA-1 DATED 9/10/1973, ITEM 16.		DAA.
	DUPLICATE VOUCHER CHECKS.	SA-1 DATED 9/10/1973, ITEM 17.		DAA.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
SCHOOLS**

Records Series ID	Description	Schedule information	Retention	Disposition
	R.O.T.C. DEPOSIT AND REFUNDS RECORDS.	SA-1 DATED 9/10/1973, ITEM 17.		DAA.
	CAFETERIA DAILY CASH REPORTS.	SA-1 DATED 9/10/1973, ITEM 18.		DAA.
	ARMORED CAR RECEIPTS FOR BANK DEPOSITS.	SA-1 DATED 9/10/1973, ITEM 19.		DAA.
	DAILY BANK DEPOSIT SLIPS.	SA-1 DATED 9/10/1973, ITEM 20.		DAA.
	CANCELLED CHECKS AND BANK STATEMENTS.	SA-1 DATED 9/10/1973, ITEM 21.		DAA.
	INVENTORY CARDS.	SA-1 DATED 9/10/1973, ITEM 22.		Destroy when equipment is disposed of.
	[IBM] FINANCIAL REPORTS (APPROPRIATED FUNDS).	SA-1 DATED 9/10/1973, ITEM 23.	1 year.	Destroy after cited retention.
	QUARTERLY CHANGES IN STATE INVENTORIES.	SA-1 DATED 9/10/1973, ITEM 24.		Destroy when posting to annual detailed inventory printout is verified.
	FEDERAL AND STATE WITHHOLDING TAX RETURNS WITH OFFICIAL RECEIPTS.	SA-1 DATED 9/10/1973, ITEM 25.		Destroy when 10 years old.

DAA = Destroy 1 month after post-audit or 5 years after end of fiscal year, whichever is shorter; except that at least 20 days written notice will be given to State Comptroller before unaudited records are destroyed. Records subject to Federal audit will not be destroyed before such audit, unless authorized by Federal regulation.

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**DEPARTMENT OF EDUCATION  
RECORDS SERIES REPORT**

**DEPARTMENT:  
SCHOOLS**

<b>Records Series ID</b>	<b>Description</b>	<b>Schedule information</b>	<b>Retention</b>	<b>Disposition</b>
	DUPLICATE INDIVIDUAL TAX RECEIPTS AND EXEMPTION CERTIFICATES.	SA-1 DATED 9/10/1973, ITEM 26.		Destroy when 10 years old.
	CAFETERIA OPERATIONAL RECORDS.	SA-1 DATED 9/10/1973, ITEM 27.		DAA.
	CASHIERS' DAILY CASH REPORTS.	SA-1 DATED 9/10/1973, ITEM 28.		DAA.
	SURPLUS COMMODITY CARDS AND PERPETUAL INVENTORY RECORDS.	SA-1 DATED 9/10/1973, ITEM 29.		DAA.
	STUDENTS' SCHOLASTIC REPORTS: (A) FORM 12, SECONDARY CUMULATIVE RECORD FORM 12B, STANDARDIZED TEST RECORD CARD, SECONDARY FORM 13, ELEMENTARY CUMULATIVE RECORD FORM 13B, STANDARDIZED TEST RECORD CARD, ELEMENTARY OR RECORDS EQUIVALENT TO THOSE LISTED ABOVE, WHEN FORMS ARE NOT ON FILE.	SA-1 DATED 12/15/1966, ITEM 46		Microfilm 8 years after graduation or withdrawal and destroy original.
	STUDENTS' SCHOLASTIC REPORTS: (B) ALL OTHER RECORDS FILED IN STUDENT RECORD FOLDERS.	SA-1 DATED 12/15/1966, ITEM 46		Destroy 8 years after graduation or withdrawal.

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STATE  
TERRITORY OF HAWAII  
RECORDS DISPOSITION AUTHORIZATION

Committee on Records Disposal, Public Archives  
Iolani Palace Grounds, Honolulu 13, Hawaii

Attention: Archivist

In compliance with Section 7-8, Revised Laws of Hawaii 1955, as amended by Act 46, Session Laws of Hawaii 1957, I hereby request  Continuous authorization to destroy or otherwise dispose of the numbered record items listed below.  Authorization

ITEM NO.	FORM NO.	DESCRIPTION	YEARS OR PERIOD		RETENTION
			FROM	THROUGH	
		Items as per attached Records Control Schedule Number 1, Central Office.			

2. Record items Nos. \_\_\_\_\_ will be preserved on microfilm in accordance with Section 7-7, Revised Laws of Hawaii 1955.

It is requested that Record items Nos. \_\_\_\_\_ be transferred to the Public Archives.

3. Clarence P. Leiden      Department of Public Instruction      Walter Gordon  
SIGNATURE OF RECORDS OFFICER      AGENCY      SIGNATURE OF HEAD OF DEPARTMENT  
DATE: 8-26-59

4. I hereby certify that the records as listed, unless exceptions are listed below, do not appear to be of sufficient value for legal, administrative, or research purposes to warrant further preservation. Exceptions: \_\_\_\_\_

Record items Nos. \_\_\_\_\_ to be transferred to  Public Archives  \_\_\_\_\_  
AGENCY      Agnes Cloward      ARCHIVIST  
DATE: AUG 28 1959

5. Destruction or other disposal, with exceptions indicated, approved.  Continuous authorization  Authorization  
James H. Keoloh      Thos. Kusin      Michael J. Mipple  
SECRETARY OF THE TERRITORY OF HAWAII      ATTORNEY GENERAL      COMPTROLLER

DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 1

CENTRAL OFFICE

This schedule covers records of the Commissioners of Public Instruction, the Superintendent and Assistant Superintendent, the Deputy Superintendents of the Divisions and Services, the Information Service and the Departmental Library.

The word "audit" as used in this schedule refers to the audit conducted by the Comptroller of the State. Whenever more than one audit is involved, the phrase "required audits" is used.

DEPARTMENT OF PUBLIC INSTRUCTION  
 STATE OF HAWAII  
 RECORDS CONTROL SCHEDULE  
 Number 1

CENTRAL OFFICE

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DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 1

CENTRAL OFFICE

Item No.	Description of Records	Disposal
<u>GENERAL RECORDS</u>		
1.	General correspondence of the Deputy Superintendents of the Divisions involving administrative and policy decisions, and regarding all operations of the Divisions.	Permanent.
2.	Correspondence of the Directors, Assistants, and Consultants of the services covering program activities, involving policy, procedures, rulings and decisions of a general nature.	Destroy when 10 years old.
3.	Correspondence of a routine nature, the replies to which do not involve administrative decisions or policy, or which loses all value after the work is completed, or the information is transcribed to a more permanent form. Extra copies of correspondence and other reference material which lose all value after their informational or reference use is exhausted.	Destroy when 1 year old.
4.	One copy of each internal directive and circular issued by or for the Superintendent, Assistant Superintendent, Deputy Superintendents or any subdivision.	Permanent.
5.	One copy of minutes and reports of meetings of committees authorized by the Superintendent or Division Directors.	Permanent.
6.	Minutes and reports of community organizations:	
	a. Originals.	Transfer with the Chairmanship.
	b. Duplicates.	Destroy when no longer needed.

Item No.	Description of Records	Disposal
<u>GENERAL RECORDS - continued</u>		
7.	One copy of each pamphlet, leaflet, bulletin, guide, manual or other published or processed document (including curriculum and workshop material) produced in the department or its subdivisions.	Permanent.
8.	Automobile mileage reports.	Destroy after audit.
9.	Budget workpapers:	
	a. Business Administration Division.	Destroy 1 year after end of biennium concerned.
	b. All others.	Destroy when no longer needed.
10.	Payrolls:	
	a. If corresponding work periods are <u>not</u> documented by D-10-A's.	Retain permanently.
	b. If corresponding work periods <u>are</u> documented by D-10-A's.	Destroy when 5 years old or after audit, whichever is later.
11.	Payroll worksheets.	Destroy when 5 years old or after audit, whichever is later.
12.	Monthly attendance reports.	Destroy when 5 years old or after audit, whichever is later.
13.	Duplicate personnel records maintained for reference, outside the Personnel Office.	Transfer to the Personnel Office upon termination of employment for consolidation with employee's personnel folder and destruction of duplicated material.
14.	School Code.	Retain a master copy including pages which have been revised. Destroy duplicates when no longer needed.

Item No.	Description of Records	Disposal
<u>SUPERINTENDENT OF PUBLIC INSTRUCTION</u>		
# 15-34 superseded by SA-1 dated 9/12/85	15. Minutes of the meetings of the Commissioners of Public Instruction.	Permanent; transfer to the Archives when 40 years old.
	16. Index to Commissioners' minutes.	Permanent.
	17. Duplicates of Commissions' agenda and minutes.	Destroy when 2 years old.
	18. Duplicates of supplementary attachments to the Commissions' minutes.	Destroy when 6 years old.
	19. General administrative file of the Superintendent regarding overall administration, policies, procedures and activities of the department.	Permanent.
	20. Annual and biennial reports of the Department of Public Instruction.	Permanent.
	21. General file of the Assistant Superintendent regarding administration, policies, operational activities and procedures.	Permanent.
	22. Principals' and Superintendents' miscellaneous circulars.	Permanent, one copy of each.
	23. Index to Principals' and Superintendents' miscellaneous circulars.	Permanent.
	24. Agenda of District Superintendents' meetings.	Destroy when 2 years old.
	25. Permits for money-raising activities in the schools.	Destroy when 4 years old.
	26. Duplicate record of attendance and payrolls.	Destroy when 2 years old.
<u>CENTRAL FILES</u>		
	27. Correspondence of the Superintendent and the Division Directors with the District Superintendents.	Permanent.

Item No.	Description of Records	Disposal
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# 15-34  
superseded by  
SA-1  
dated  
9/10/85

CENTRAL FILES - continued

- |     |  |   |
|-----|--|---|
| 28. | Correspondence of the Superintendent and the Division Directors filed by Divisions.  | Permanent.  |
| 29. | General correspondence of the Superintendent and the Division Directors not covered by other items.  | Permanent.  |
| 30. | Correspondence of the Superintendent and the Division Directors with other departments of the state.   | Screen in accordance with General Records provisions. |
| 31. | Correspondence of the Superintendent and the Division Directors with the various districts and schools regarding payrolls, attendance, school accounts, property, etc. | Destroy when 10 years old.                            |

PUBLIC RELATIONS AND INFORMATION

- |     |  |            |
|-----|--|------------|
| 32. | Press releases — newspaper clippings of all items concerning the department. | Permanent. |
| 33. | Photographs and negatives of department personnel and school activities.     | Retain.    |

LIBRARY

- |     |                      |            |
|-----|----------------------|------------|
| 34. | Newspaper clippings. | Permanent. |
|-----|----------------------|------------|

SPECIAL SERVICES DIVISION  
Administrative

- |     |  |                           |
|-----|--|---------------------------|
| 35. | Copies of contracts for teachers and professional staff. | Destroy when 5 years old. |
|-----|--|---------------------------|

Item No.	Description of Records	Disposal
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SPECIAL SERVICES DIVISION  
Research and Evaluation

36. Reports:

- a. Confidential reports to the schools of results of the California Mental Maturity and Achievement tests. Permanent.
- b. California Mental Maturity test results compiled according to grade level. Retain.

37. IBM cards — record of all students taking the California Mental Maturity and Mental Achievement tests. Destroy when 10 years old.

38. Listings of gifted children. Retain.

39. Listings of mentally retarded children. Destroy when 6 years old.

SPECIAL SERVICES DIVISION  
Health Education

40. School health program — services for speech, hearing, vision, health surveys, and programs for exceptional children. Permanent.

41. Register of physically handicapped children. Destroy 2 years after becoming inactive.

SPECIAL SERVICES DIVISION  
Dental Health

42. Correspondence of dental hygienists — notes, reports, and contracts. Destroy when 10 years old.

43. Decayed-Missing-Filled Rate Reports. Retain.

SPECIAL SERVICES DIVISION  
Exceptional Children  
(See General Items)

Item No.	Description of Records	Disposal
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SPECIAL SERVICES DIVISION

Pupil Guidance  
(See General Items)

INSTRUCTION DIVISION

Administrative  
(See General Items)

INSTRUCTION DIVISION

Elementary Education

- |     |  |                           |
|-----|--|---------------------------|
| 44. | In-service education correspondence, programs and credits. | Destroy when 5 years old. |
|-----|--|---------------------------|

INSTRUCTION DIVISION

Secondary Education  
(See General Items)

INSTRUCTION DIVISION

Special Subject Areas

A. Art Education  
(See General Items)

- |     |   |                           |
|-----|---|---------------------------|
| 45. | Workshop and in-service credit records. | Destroy when 5 years old. |
|-----|---|---------------------------|

B. Physical Education  
(See General Items)

- |     |   |                           |
|-----|---|---------------------------|
| 46. | Workshops -- attendance, in-service credit, fees collected, evaluation, and minutes of planning meetings.   | Destroy when 5 years old. |
| 47. | National Federation of State High School Athletic Associations -- correspondence of the Director and National Federation, including rules, organization and policies governing the association. | Destroy when 5 years old. |

Item No.	Description of Records	Disposal
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Special Subject Areas - continued

B. Physical Education - continued  
(See General Items)

- |     |   |                            |
|-----|---|----------------------------|
| 48. | Hawaii High School Athletic Association -- committees, conferences of Executive Board and General Assembly, bulletins, interleague contracts, press releases, voting records and financial records including bank statements, deposits, ledgers, receipts insurance policies, check registers, financial reports and auditor's reports. | Destroy when 10 years old. |
|-----|---|----------------------------|

C. Science and Mathematics  
(See General Items)

- |     |   |                           |
|-----|---|---------------------------|
| 49. | Workshop and in-service credit records. | Destroy when 5 years old. |
|-----|---|---------------------------|

D. Economic Education  
(See General Items)

E. Language Arts  
(See General Items)

- |     |   |                           |
|-----|---|---------------------------|
| 50. | Workshop and in-service credit records. | Destroy when 5 years old. |
|-----|---|---------------------------|

INSTRUCTION DIVISION  
Adult Education

- |     |   |                            |
|-----|---|----------------------------|
| 51. | Evening School class records:                     |                            |
|     | a. Attendance cards and non-credit class records. | Destroy after audit.       |
|     | b. Credit class records.                          | Destroy when 50 years old. |

Item No.	Description of Records	Disposal
<u>Adult Education - continued</u>		
52.	Student certification --- grammar and high school test reports, application for diplomas:	
	a. Diplomas granted.	Destroy when 50 years old.
	b. Incomplete applications.	Destroy when 10 years old.
	c. Record of persons who have paid no money.	Destroy when 1 year old.
53.	Advisory Council for Adult Education:	
	a. Correspondence, reports, programs, membership and committees.	Destroy when 5 years old.
	b. Minutes of the Council.	Permanent.
54.	Advisory Council subcommittee reports.	Retain.
55.	Resale Book Accounts Ledger and Inventory.	Destroy 5 years after audit.
56.	Reports --- monthly and annual student attendance and annual narrative and fiscal.	Destroy when 5 years old.
57.	Course outlines for teachers.	Destroy when 5 years old.
58.	Detail Register of Receipts and Expenditures.	Destroy when 25 years old.
59.	Records of the petty cash fund.	Destroy after audit.
60.	Payroll cards for part-time hourly teachers and supervisors.	Permanent.
61.	Workshop and in-service credit records.	Destroy when 5 years old.

Item No.	Description of Records	Disposal
<u>Adult Education - continued</u>		
62.	Veterans' case files:	
	a. Veterans under PL 16.	Retain.
	b. Veterans under PL 894.	Retain.
	c. Veterans under PL 346.	Destroy 10 years after expiration of the law (law expired July 1955).
	d. Veterans who applied, but did not enter school.	Destroy 1 year after latest date in the folder.

INSTRUCTION DIVISION  
Board of Examiners

63.	Board of Examiners -- applications for administrative certification and all supporting documents.	Destroy 50 years after termination of employment.
64.	Annual summary of administrative examinations, test data, results, and correspondence.	Destroy 50 years after termination of employment.
65.	Correspondence of the Board of Examiners -- meetings, policies, examinations and reports.	Destroy when 10 years old.
66.	Minutes of the Board of Examiners.	Permanent.

BUSINESS ADMINISTRATION

67.	Record of purchase of postage by schools.	Destroy after audit.
68.	Directory data card file -- work file used to compile the directory.	Destroy 2 months after issuance of the directory.
69.	Legal ownership papers and record cards of licensed vehicles.	Destroy 3 years after disposal of vehicle.
70.	Motor vehicle correspondence -- registration, licensing and insurance.	Destroy when 1 year old.
71.	Automobile Fleet Insurance Reports.	Destroy 3 years after expiration of the policy.

Item No.	Description of Records	Disposal
<u>BUSINESS ADMINISTRATION - continued</u>		
72.	Position Allotment Authorizations.	Destroy when 4 years old.
73.	School Enrollment and District Enrollment Reports.	Destroy when 6 months old.
74.	Correspondence with the Legislature.	Destroy when 5 years old.
75.	Correspondence regarding quality, suitability, price, and availability of supplies and equipment.	Destroy when 1 year old.
76.	Requisitions for supplies and equipment ordered, filled and shipped.	Destroy all copies when 2 years old.
77.	Bills of Lading.	Destroy when 4 years old.
78.	School Reports — pupil and teacher information on private and public schools.	Permanent.
79.	Federal Financial Assistance Program — applications and supporting documents.	Applications, permanent; destroy all other papers after federal audit.
80.	Reports of authorization of positions and related material.	Destroy when 10 years old.
81.	Principals' monthly and annual financial reports of schools.	Destroy 2 years after close of biennium concerned.
82.	Annual summary of principals' financial reports.	Destroy when 4 years old.
83.	Monthly payroll of workers paid from the cafeteria fund.	Destroy when 5 years old. (The permanent copy will be retained at the school.)
84.	Cross index of old teachers' names used for work on old personnel files.	Retain.
85.	Workmen's Compensation records.	Destroy 10 years after settlement.
86.	Payroll master record cards.	Permanent.

*-superseded by SA-1 dated 2/6/95*

Item No.	Description of Records	Disposal
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PERSONNEL DIVISION

Administrative

- |     |   |                           |
|-----|---|---------------------------|
| 87. | Correspondence of the Inspector of private schools.   | Permanent.                |
| 88. | Stubs of licenses issued to private school teachers, and to technical and trade and private schools.                        | Destroy when 5 years old. |
| 89. | Record cards for all licenses issued to private school teachers and record cards of all licenses issued to private schools. | Permanent.                |
| 90. | Monthly statistical reports received from private schools.  | Destroy when 5 years old. |

PERSONNEL DIVISION

Recruitment and Certification

- |     |  |   |
|-----|--|---|
| 91. | Correspondence and applications from teachers interested in employment:        |   |
|     | a. Teachers hired.   | Transfer to in-service folders.   |
|     | b. Inquiries answered by DPI, but no further correspondence with applicant.    | Return all personal papers to applicant or institution; destroy remainder of the file after 1 year. |
|     | c. Applicants with whom there is additional correspondence, but are not hired. | Return all personal papers to applicant or institution; destroy remainder of file after 2 years.    |

Item No.	Description of Records	Disposal
<u>Recruitment and Certification - continued</u>		
92.	Correspondence and applications for exchange teaching assignments:	
	a. Local applicants.	If completed, transfer to in-service files; if not completed, destroy when 1 year old.
	b. Mainland applicants.	If accepted, transfer to in-service files; if not accepted, return all personal papers to applicant and destroy remainder of file when 2 years old.
93.	Record cards of teachers' certificates revoked by mainland systems.	Destroy when teacher is reinstated or when card is 50 years old.
94.	Memorandums stating reason for revocation of teachers' certificates by mainland systems.	Destroy when 3 years old.
95.	Card file of new recruits for current school year.	Destroy before new annual recruitment.
96.	Teachers' Certificate card file.	Destroy 50 years after original certification.
97.	Provisional Certificate card file.	Destroy when higher requirement is met or after resignation of teacher.
98.	Teachers' Certificate stubs.	Destroy when 2 years old.
99.	Minutes of the Board of Examiners.	Permanent.
100.	Reports of in-service workshops or courses, including credit certificates.	Destroy after posting to certificate card.
101.	Applications of substitute teachers.	Destroy when 5 years old.

Item No.	Description of Records	Disposal
<u>Recruitment and Certification - continued</u>		
102.	Eligible lists of principals and vice-principals.	Retain one copy of each list.
103.	Personnel records of certificated personnel, including bound volumes.	Retain. <i>Amended 11/63, 4/65, 3/83</i>
104.	Service Record Summary cards for certificated personnel.	Permanent.
105.	School Lists.	Master copy, permanent.
106.	IBM information cards for teachers' contracts.	Destroy when superseded.
107.	Teachers' salary cards.	Permanent.
108.	Appointee's records cards:	
	a. Full-time teachers.	Destroy after posting to summary record card.
	b. Evening and part-time teachers.	Retain.
109.	<del>Change-of-name</del> cross index cards.	Retain.
<u>PERSONNEL DIVISION</u> <u>Classified Personnel</u>		
110.	Personnel folders of classified employees.	Destroy 10 years after termination of employment.
111.	Service Record Summary cards for classified personnel.	Retain.
112.	Position Record cards.	Retain.
113.	Personnel files of all unclassified cafeteria helpers, cooks, and school supplementary lunch cooks.	Destroy 10 years after termination of employment.
114.	Eligible list of cafeteria workers.	Destroy after 1 year.
115.	Recommendations to positions.	Destroy when approved D-10-A is received.

Item No.	Description of Records	Disposal
<u>VOCATIONAL EDUCATION DIVISION</u> <u>Administrative</u>		
116.	IBM summary cards, giving information regarding part-time instructors.	Destroy when agreement is revoked.
117.	Records of evening and part-time classes, including reports, requests for classes, and cards for each class used in payroll and statistics.	Destroy when 6 years old.
118.	Teacher contracts for part-time and evening instruction.	Destroy when contract is revoked.
119.	Adult, evening and part-time class record book.	Destroy when 3 years old.
120.	Annual Federal Descriptive Reports, covering all work accomplished during the year by Vocational Education Programs.	Permanent.
121.	Annual Federal Detail of Expenditures, covering reimbursable expenditures on all types of classes, teachers' salaries and training.	Permanent.
122.	Copies of Federal Expenditure Vouchers.	Destroy after audit.
123.	State Expenditure Ledger.	Destroy when 10 years old.
124.	Federal Reimbursable Expenditure Ledger.	Destroy when 10 years old.
125.	Purchase Order Encumbrance record and History record.	Destroy when 3 years old.
126.	Annual Federal Statistical and Financial Reports.	Permanent.
127.	Requisitions for material needed for programs.	Destroy when 2 years old.

VOCATIONAL EDUCATION DIVISION  
Agricultural Education

128.	Service Letters for Future Farmers of America, Young Farmers and Veterans. Directional and informational letters to public school agricultural teachers related to programs, policies, rules and regulations.	Permanent.
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Item No.	Description of Records	Disposal
<u>Agricultural Education - continued</u>		
129.	Future Farmers of America and Young Farmers:	
	a. Annual state summary report of activities and programs.	Destroy when 25 years old.
	b. Annual school reports.	Destroy when 3 years old.
130.	Future Farmers of America and Young Farmers, record of dues paid and expenditures.	Destroy when 10 years old.
131.	Individual veterans' training records of courses taken, hours per course, cost of supplies and termination.	Permanent.
132.	Veterans' Training Contracts.	Destroy 10 years after completion.
<u>VOCATIONAL EDUCATION DIVISION</u> <u>Home Economics Education</u>		
133.	National School Lunch Program records:	
	a. Monthly cafeteria record.	Destroy when 6 years old.
	b. Federal reimbursement claims.	Destroy 3 years after federal audit.
134.	Federal Commodity USDA Distribution Lists and Receipt Cards for allocation of federal commodities to public and private schools and institutions.	Destroy 6 years after federal audit.
135.	Annual Statement of Income and Expenditure for National School Lunch and Special Milk Programs.	Destroy when 6 years old.
136.	School Lunch Program Plan of Operations -- lists of state supervisory personnel and state matching funds.	Destroy when 6 years old.
137.	Administrative Reviews -- cafeteria supervisory report.	Destroy when 3 years old.

Item No.	Description of Records	Disposal
<u>Home Economics Education - continued</u>		
138.	Annual descriptive and statistical reports, and report to the Governor.	Permanent.
139.	Public School Cafeteria Manual.	Permanent.
140.	Address cards for instructors and cafeteria managers.	Destroy when superseded.
<u>VOCATIONAL EDUCATION DIVISION</u> <u>Trade and Industrial Education</u>		
141.	Reports of student enrollment by subject:	
	a. Monthly cumulative report.	Destroy when 1 year old.
	b. Annual compilation.	Permanent.
<u>VOCATIONAL EDUCATION DIVISION</u> <u>Industrial Arts</u>		
142.	Semester Reports -- class enrollment, schedules, etc.	Destroy when 2 years old.
143.	Approved list for equipment and hand tool purchases.	Destroy when superseded.
<u>VOCATIONAL EDUCATION DIVISION</u> <u>Occupational Information and Guidance Service</u>		
144.	IBM detail cards for follow-up of high school graduates in the State of Hawaii.	Retain.
145.	Information on scholarships and financial aids.	Retain one copy of all material originated.
<u>SCHOOL BUILDING SERVICES</u>		
146.	School building standards and educational facilities.	Permanent.

Item No.	Description of Records	Disposal
<u>SCHOOL BUILDING SERVICES - continued</u>		
147.	School Facilities Inventory files consisting of executive orders, Boards of Supervisors' and City Councilmen's resolutions and Committee reports, correspondence and data regarding schools.	Destroy after disposal of land and buildings.
148.	School Building Project Specifications.	Destroy after disposal of building.
149.	Blueprint plans of completed school building projects.	Destroy after disposal of building.



DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 2

DISTRICT OFFICES

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DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 2

DISTRICT OFFICES

The word "audit" as used in this schedule refers to the audit conducted by the Comptroller of the State. Whenever additional audits are necessary the phrase "required audits" is used.

DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 2

DISTRICT OFFICES

Item No.	Description of Records	Disposal
<u>GENERAL RECORDS</u>		
1.	One copy of each internal directive and circular issued by or for the District Offices or subdivisions.	Permanent.
2.	One copy of minutes of committees authorized by the District Offices, such as Principals' Group.	Permanent.
3.	One copy of all reports received from subsidiary agents or issued by the District Superintendents.	Permanent.
4.	Minutes and reports of community organizations:	
	a. Originals.	Transfer with the Chairmanship.
	b. Duplicates.	Destroy when no longer needed.
5.	One copy of each pamphlet, leaflet, bulletin, guide, manual or processed document (including curriculum and workshop material) produced in the District Offices or subdivisions.	Permanent.
<u>DISTRICT SUPERINTENDENTS AND DEPUTY DISTRICT SUPERINTENDENTS</u>		
6.	General correspondence of District Superintendents and Deputy District Superintendents dealing with overall administration.	Destroy when 5 years old.
7.	Duplicate Minutes of Meetings of the Commissioners of Public Instruction.	Destroy when 10 years old.

Item No.	Description of Records	Disposal
<u>PERSONNEL</u>		
8.	Duplicate personnel folders of Certificated Personnel.	Destroy 10 years after employee's termination.
9.	Duplicate personnel folders of Classified Personnel.	Destroy 5 years after employee's termination.
10.	Civil Service and Certificated Service cards.	Destroy 10 years after termination.
11.	In-service credit certificates.	Destroy after posting to service cards.
12.	Civil Service correspondence and reports regarding the schools.	Destroy when 10 years old.
13.	Inactive or incomplete Teachers' and Substitutes' Applications.	Destroy 1 year after date of application.
14.	Record of Attendance cards for Classified Personnel.	Destroy when 10 years old.
15.	Civil Service Roster by schools.	Retain.
16.	Substitute teachers' summary cards.	Destroy when 20 years old.
17.	Teachers' Position Allotment Authorizations.	Destroy when 20 years old.
18.	Placement Recommendations.	Destroy when 1 year old.
19.	Civil Service correspondence.	Destroy when 10 years old.
20.	Reports, policies, committees, rosters, etc.	Destroy when 10 years old.

SCHOOL BUILDING SERVICES

21.	General correspondence of the Assistant District Superintendents of School Building Services Divisions.	Destroy when 6 years old.
22.	Records on construction of new buildings and acquisition of new sites including plot plans, blueprints and maps and progress reports.	Destroy when 6 years old.

Item No.	Description of Records	Disposal
<u>BUSINESS ADMINISTRATION</u>		
23.	General correspondence of the Assistant District Superintendents.	Destroy when 6 years old.
24.	Principals' Monthly and Annual Financial Reports.	Destroy after audit at school level.
25.	Records on use of public school buildings by outside organizations.	Destroy when 3 years old.
26.	U.S. Surplus Foods records.	Destroy when 2 years old.
27.	Substitute teachers' payroll cards.	Permanent.
28.	Payroll explanatory sheets for substitute teachers.	Destroy when 2 years old.
29.	Department of Public Welfare Temporary Labor Force records.	Destroy when 1 year old.
30.	Custodians' payrolls.	Destroy when 10 years old.
31.	Custodians' Personal Data file.	Destroy 2 years after termination.
32.	Summary card file on Territorial Workmen's Compensation, including necessary forms.	Destroy 2 years after settlement.
33.	Records on County Workmen's Compensation.	Destroy 10 years after settlement.
34.	County Budgets.	Destroy when 5 years old.
35.	County Inventory.	Destroy when 7 years old.
36.	County Requisitions.	Destroy when 2 years old.
37.	County Purchase Orders.	Destroy 2 years after audit.
38.	County Janitors' Supply Requisitions.	Destroy when 2 years old.

Item No.	Description of Records	Disposal
<u>BUSINESS ADMINISTRATION - continued</u>		
39.	Accounting card file of school expenditures.	Destroy when 10 years old.
40.	Paid invoices and statements with DPI purchase orders and school disbursement records and duplicate voucher checks for purchases paid by school funds.	Destroy when 3 years old or after audit, whichever is later.
41.	Janitors' school fund ledgers.	Destroy when 10 years old.

CURRICULUM DIVISION  
Elementary Education

42.	Correspondence and memorandums concerning school activities.	Destroy when 5 years old.
43.	Field Assistants' correspondence, minutes, reports, curriculum materials and memorandums.	Destroy when 3 years old.
44.	Personnel folders of Field Assistants.	Destroy when 5 years old.

CURRICULUM DIVISION  
Secondary Education

45.	General correspondence of the Assistant District Superintendents for Secondary Education dealing with administration, policies, operational activities and procedures.	Destroy when 5 years old.
46.	Testing materials and results of tests given.	Destroy when 5 years old.
47.	Supervisors' auto mileage records.	Destroy after audit.
48.	Record of correspondence, circulars and memorandums sent to and received from individual schools.	Destroy when 1 year old.

Item No.	Description of Records	Disposal
<u>CURRICULUM DIVISION</u> <u>Audio-Visual Education</u>		
49.	General correspondence regarding policies.	Destroy when 10 years old.
50.	Correspondence and memorandums on procedures and operational activities.	Destroy when 5 years old.
51.	Circulation service index cards.	Retain.
52.	Statistical reports on operational activities.	Retain.
53.	Personnel records.	Destroy 5 years after termination.
54.	Building specifications for audio-visual education in the classroom.	Destroy on revision.
55.	Project working papers.	Destroy 5 years after completion.
56.	Project reports.	Retain.
57.	Audio-visual instructional materials.	Destroy when obsolete.
<u>CURRICULUM DIVISION</u> <u>Adult Education</u>		
58.	General correspondence of the Field Assistants for Adult Education, including program records.	Destroy when 5 years old.
59.	Community Schools records.	Destroy when 15 years old.
60.	Curriculum materials.	Destroy when obsolete.
61.	Project working papers.	Destroy when 5 years old.
62.	Teachers' applications.	Destroy 5 years from date of application.
63.	Index of teachers available.	Destroy when obsolete.

Item No.	Description of Records	Disposal
<u>PUPIL PERSONNEL SERVICES</u>		
64.	General correspondence of the Assistant District Superintendents for Pupil Personnel Services.	Destroy when 7 years old.
65.	Records concerning individual schools:	
	a. General correspondence.	Destroy when 15 years old.
	b. Reports, enrollment data, survey data for boundary determination.	Destroy when 2 years old.
66.	District Exception Requests file including action taken.	Destroy when 5 years old.
67.	Case records of mentally retarded, gifted and inactive.	Retain.
68.	Summary card file of case histories of mentally retarded, gifted and inactive.	Retain.
69.	Speech and Hearing Program case histories.	Destroy when 12 years old.
70.	Summary card file of case histories.	Retain.
71.	School survey results under Speech and Hearing Program.	Retain.

PUPIL PERSONNEL SERVICES  
Pupil Guidance

72.	Policies, monthly statistical reports, and evaluations of special projects.	Retain.
73.	Early records of Mentally Retarded Program.	Permanent.
74.	Master card file of guidance cases.	Retain.
75.	Case records file.	Retain.
76.	Statistical card file.	Retain.



DEPARTMENT OF EDUCATION  
Records Retention Schedule  
For Schools

<u>Item No.</u>	<u>Description of Records</u>	<u>Present Retention</u>	<u>Proposed Retention</u>	<u>Explanation</u>
<u>PRINCIPALS' OFFICES - continued</u>				
12.	Payroll Explanatory Sheets for Substitutes used for payrolls.	Destroy after audit.	DAA	No change
13.	Bureau of Workmen's Compensation forms.	Destroy 1 year after settlement.	Destroy 1 year after final payment & DAA	Minor change
14.	Performance Rating Reports for school custodians	Destroy when 1 year old.		Delete entire statement - custodians' performance rating reports are part of all other employees.
15.	County Requisitions for supplies & equipment.	Destroy when 2 years old.		Delete entire statement since counties no longer have jurisdiction.
<u>BUSINESS OFFICES</u>				
16.	Principals' Monthly & Annual Financial Reports	Destroy when 10 years old or after audit, whichever is later.	DAA	To conform with General Records Schedule (GRS) #1 of State Archives.
17.	Monthly Financial Statements to the teachers or department heads concerning fee collections and expenditures	Destroy at end of school year.		Delete entire statement; no school fees. Other internal forms or reports available.
18.	Minutes of the Finance Committees and the Athletic Boards.	Retain a master set. Destroy all other copies 5 years old.	Retain a master set. Destroy copies when no longer needed for administrative purposes.	To conform with GRS #1.
19.	Applications for use of auditorium, classrooms, playground, etc.	Destroy when 6 years old or after audit, whichever is later.	DAA	Ditto

DAA - Destroy 1 month after post-audit or 5 years after end of fiscal year, whichever is shorter; except that at least 20 days written notice will be given to the State Comptroller before unaudited records are destroyed. Records subject to Federal audit will not be destroyed before such audit, unless authorized by Federal regulation.

<u>Item No.</u>	<u>Description of Records</u>	<u>Present Retention</u>	<u>Proposed Retention</u>	<u>Explanation</u>
20.	Requisitions for books, supplies and equipment.	Destroy after audit.		Delete entire statement; purchase orders available.
21.	Paid invoices and statements with DOE purchase orders, school disbursement records, journal vouchers and duplicate voucher checks for purchases paid by non-appropriated funds.	Destroy when 3 years old or after audit, whichever is later.	DAA	Minor changes on description of records; conform with GRS #1.
22.	Check Registers	Destroy when 10 years old or after audit, whichever is later.	DAA	To conform with GRS #1.
23.	School sales invoices and certified bills for collection.	Destroy all copies 2 years after audit.	DAA	Ditto
24.	Duplicate voucher checks.	Destroy when 3 years old or after audit, whichever is later.	DAA	
25.	Purchase order books (triplicate).	Destroy 3 years after audit.	DAA	
26.	Receipts and Disbursements Journals and Ledgers.	Destroy when 10 years old or after audit, whichever is later.	DAA	To conform with GRS #1.
27.	Purchase Orders and Invoices. (Appropriated and Trust Funds).	Destroy when 2 years old or after audit, whichever is later.	DAA	Ditto
28.	Daily recapitulation summaries of receipts and disbursements.	Destroy when 2 years old or after audit, whichever is later.	DAA	
29.	Receipts for collections through School Business Offices.	Destroy when 10 years old.	DAA	To comply with GRS #1.
30.	Subsidiary receipts used by teachers for classroom collections.	Destroy 1 year after audit.	DAA	Ditto

<u>Item NO.</u>	<u>Description of Records</u>	<u>Present Retention</u>	<u>Proposed Retention</u>	<u>Explanation</u>
31.	Students' financial cards for payment of students' dues, etc.	Destroy when 2 years old or after audit, whichever is later.	DAA	Ditto
32.	R.O.T.C. Deposit & Refund Records.	Destroy after audit.	DAA	Ditto
33.	Cafeteria Daily Cash Reports.	Destroy after audit.	DAA	Ditto
34.	Armored car receipts for bank deposits.	Destroy after audit.	DAA	Ditto
	Daily bank deposit slips.	Destroy after audit.	DAA	Ditto
36.	Cancelled checks and bank statements.	Destroy when 10 years old or after audit, whichever is later.	DAA	Ditto
37.	Fee collections budgetary worksheets.	Destroy after audit.		Delete entire statement.
38.	Fee distribution breakdown sheets.	Destroy after audit.		Ditto
39.	Inventory cards.	Destroy when equipment is disposed of.	Same	No change necessary.
39a.	IBM Financial Reports (Appropriated Funds)		1 year	
40.	Quarterly changes in State inventories.	Destroy after posting to Detailed Inventory sheets is verified.	Destroy after posting to annual detailed inventory printout is verified.	Minor changes to reflect IBM printouts instead of typewritten reports.
41.	Federal and State Withholding Tax Returns with official receipts.	Destroy when 10 years old.	No change	
42.	Duplicate Individual Tax Receipts and Exemption Certificates.	Destroy when 10 years old.	No change	
43.	Withholding Tax cards for miscellaneous payrolls.	Retain records prior to Sept. 1953. Destroy others when 10 years old.		Delete entire statement; not applicable.
44.	Faculty Community Chest Payment forms & distribution sheets.	Destroy at end of school year.		Delete entire statement; not applicable.
45.	County Light Reports.	Destroy when 6 years old or after audit, whichever is later.		Delete entire statement; not applicable.

<u>Item No.</u>	<u>Description of Records</u>	<u>Present Retention</u>	<u>Proposed Retention</u>	<u>Explanation</u>
	<u>CAFETERIAS</u>			
68.	Cafeteria operational records.	Destroy when 6 years old or after audit, whichever is later.	DAA	
69.	Employees' payrolls:			
	a. Since September 1953.	Destroy when 6 years old or after audit, whichever is later.		Eliminate entire statement; not applicable. Payroll records are in State Business Office.
	b. Prior to September 1953.	Retain.		
70.	Cashiers' Daily Cash Reports.	Destroy when 6 years old or after audit, whichever is later.	DAA	
71.	Surplus commodity cards and perpetual inventory records.	Destroy when 6 years old or after audit, whichever is later.	DAA	Added perpetual inventory records.

STATE  
~~REPUBLIC~~ OF HAWAII  
RECORDS DISPOSITION AUTHORIZATION

Committee on Records Disposal, Public Archives  
Iolani Palace Grounds, Honolulu 13, Hawaii

Attention: Archivist

In compliance with Section 7-8, Revised Laws of Hawaii 1955, as amended by Act 46, Session Laws of Hawaii 1957, I hereby request  Continuous authorization to destroy or otherwise dispose of the numbered record items listed below.  Authorization

ITEM NO.	FORM NO.	DESCRIPTION	YEARS OR PERIOD		RETENTION
			FROM	THROUGH	
		Items as per attached Records Control Schedule Number 3, Schools.			

2. Record items Nos. \_\_\_\_\_ will be preserved on microfilm in accordance with Section 7-7, Revised Laws of Hawaii 1955.

It is requested that Record items Nos. \_\_\_\_\_ be transferred to the Public Archives.

3. Clareme R. Leiden Department of Public Instruction Walter Gordon  
SIGNATURE OF RECORDS OFFICER AGENCY SIGNATURE OF HEAD OF DEPARTMENT

DATE: 9/26/59

4. I hereby certify that the records as listed, unless exceptions are listed below, do not appear to be of sufficient value for legal, administrative, or research purposes to warrant further preservation. Exceptions: \_\_\_\_\_

Record items Nos. \_\_\_\_\_ to be transferred to  Public Archives  \_\_\_\_\_  
AGENCY

Agnes Conrad ARCHIVIST  
DATE: AUG 28 1959

5. Destruction or other disposal, with exceptions indicated, approved.  Continuous authorization  Authorization

James K. Kealoha John L. ... Michael M. ...  
SECRETARY OF THE TERRITORY OF HAWAII ATTORNEY GENERAL COMPTROLLER

DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 3  
  
SCHOOLS

This schedule does not include institutional, technical or adult community schools. Separate schedules will be issued for such schools in the future. However, to the extent that Schedule Number 3 does apply to their records, they are urged to avail themselves of its disposal provisions.

The word "audit" as used in this schedule refers to the audit conducted by the Comptroller of the State. Whenever additional audits are necessary the phrase "required audits" is used.

DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 3

SCHOOLS

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DEPARTMENT OF PUBLIC INSTRUCTION  
STATE OF HAWAII  
RECORDS CONTROL SCHEDULE  
Number 3

SCHOOLS

Item No.	Description of Records	Disposal
<u>PRINCIPALS' OFFICES</u>		
1.	Principals' general files.	Destroy when 4 years old.
2.	Principals' miscellaneous files on operational activities.	Destroy when 2 years old.
3.	Yearly School Enrollment Reports.	Destroy when 1 year old.
4.	Term Reports. <i>Code</i>	Destroy when 1 year old.
5.	Class Record Books:	
	a. Non-fee classes.	Destroy 1 year after last entry recorded in students' records.
	b. Fee classes.	Destroy after audit.
6.	School Registers of Attendance.	Destroy 10 years after last entry. <i>rev. 1/6/34</i>
7.	Official school lists of teachers.	Destroy when 2 years old.
8.	Teachers' individual folders.	Transfer with teacher. Destroy 10 years after termination. <i>rev. 1/6/34</i>
9.	Teachers' Requests for Assignment.	Destroy when 2 years old.
10.	Appointment Agreements.	Destroy when 2 years old.
11.	Teachers' Records of Attendance.	Destroy when 2 years old.

Item No.	Description of Records	Disposal
<u>PRINCIPALS' OFFICES - continued</u>		
12.	Payroll Explanatory Sheets for Substitutes, used for payrolls.	Destroy after audit.
13.	Bureau of Workmen's Compensation forms.	Destroy 1 year after settlement.
14.	Performance Rating Reports for school custodians.	Destroy when 1 year old.
15.	County Requisitions for supplies and equipment.	Destroy when 2 years old.
<u>BUSINESS OFFICES</u>		
16.	Principals' Monthly and Annual Financial Reports.	Destroy when 10 years old or after audit, whichever is later.
17.	Monthly Financial Statements to the teachers or department heads concerning fee collections and expenditures.	Destroy at end of school year.
18.	Minutes of the Finance Committees and the Athletic Boards.	Retain a master set. Destroy all other copies when 5 years old.
19.	Applications for use of auditorium, classrooms, playground, etc.	Destroy when 6 years old or after audit, whichever is later.
20.	Requisitions for books, supplies and equipment.	Destroy after audit.
21.	Paid invoices and statements with DPI purchase orders, school disbursement records, and duplicate voucher checks for purchases paid by school funds.	Destroy when 3 years old or after audit, whichever is later.
22.	Check Registers.	Destroy when 10 years old or after audit, whichever is later.
23.	School sales invoices and certified bills for collection.	Destroy all copies 2 years after audit.

Items 12-15 superseded by SA-1 dtd 9/2/73

Item No.	Description of Records	Disposal
<u>BUSINESS OFFICES - continued</u>		
24.	Duplicate voucher checks.	Destroy when 3 years old or after audit, whichever is later.
25.	Purchase order books (triplicate).	Destroy 3 years after audit.
26.	Receipts and Disbursements Journals and Ledgers.	Destroy when 10 years old or after audit, whichever is later.
27.	Journal vouchers, purchase orders and payment notice records.	Destroy when 2 years old or after audit, whichever is later.
28.	Daily recapitulation summaries of receipts and disbursements.	Destroy when 2 years old or after audit, whichever is later.
29.	Receipts for collections through Business Offices.	Destroy when 10 years old.
30.	Subsidiary receipts used by teachers for classroom collections.	Destroy 1 year after audit.
31.	Students' financial cards for payment of school fees and rentals.	Destroy when 2 years old or after audit, whichever is later.
32.	R.O.T.C. Deposit and Refund Records.	Destroy 2 years after audit.
33.	Cafeteria Daily Cash Reports.	Destroy after audit.
34.	Armored car receipts for bank deposits.	Destroy after audit.
35.	Daily bank deposit slips.	Destroy after audit.
36.	Cancelled checks and bank statements.	Destroy when 10 years old or after audit, whichever is later.
37.	Fee collections budgetary worksheets.	Destroy after audit.
38.	Fee distribution breakdown sheets.	Destroy after audit.
39.	Inventory cards.	Destroy when equipment is disposed of.

Items  
2-45  
superseded  
by SA-1  
dab  
2/12/73

Item No.	Description of Records	Disposal
<u>BUSINESS OFFICES - continued</u>		
40.	Quarterly changes in state inventories.	Destroy after posting to Detailed Inventory sheets is verified.
41.	Federal and State Withholding Tax Returns with official receipts.	Destroy when 10 years old.
42.	Duplicate Individual Tax Receipts and Exemption Certificates.	Destroy when 10 years old.
43.	Withholding Tax cards for miscellaneous payrolls.	Retain records prior to September 1953. Destroy others when 10 years old.
44.	Faculty Community Chest Payment forms and distribution sheets.	Destroy at end of school year.
45.	County Light Reports.	Destroy when 6 years old or after audit, whichever is later.
<u>REGISTRARS' OFFICES</u>		
46.	Students' Scholastic Reports.	Retain.
47.	Students' tracer cards.	Retain. rev. 1/6/84
48.	Student releases.	Destroy when 3 years old.
49.	District exceptions.	Destroy when 3 years old.
50.	Quarterly reports of enrollment and marks.	Retain.
51.	Graduation lists.	Retain.
52.	Yearly school enrollments.	Retain.
53.	Rosters of school leavers.	Retain. rev. 1/6/84
54.	Vocational Counselors' worksheets.	Destroy 10 years after graduation or termination of education.

turning  
D-45  
superseded  
by SA-1  
dtd  
2/12/73

superseded by SA-1  
dtd 12/16/66

Item No.	Description of Records	Disposal
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REGISTRARS' OFFICES - continued

55.	Surveys for boundary changes.	Destroy when 5 years old.
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ATTENDANCE OFFICES

56.	Teachers' Monthly Enrollment Reports.	Destroy when 1 year old.
57.	Students' Daily Attendance Records submitted by special activities teachers.	Destroy when 3 years old or after graduation, whichever is earlier.
58.	Absence Records of students.	Destroy after posting to Students' Records.
59.	School Registers of students.	Destroy after posting to record card.
60.	Custodians' payrolls.	Destroy when 2 years old.

STUDENT BODY OFFICES

61.	Student Body Committee reports, minutes and yearly summaries.	Permanent. <i>rev. 1/6/84</i>
62.	Annotated ballots.	Permanent. <i>rev. 1/6/84</i>
63.	Voting record registers.	Destroy when 3 years old.

HEALTH CENTERS

64.	Health cards.	Retain.
65.	Records of blood bank donors.	Destroy when 1 year old.
66.	Dental Health Record OK cards.	Destroy at end of school year.
67.	Correspondence concerning student recommendations for employment or military service.	Destroy when 5 years old.

Item No.	Description of Records	Disposal
<u>CAFETERIAS</u>		
68.	Cafeteria operational records.	Destroy when 6 years old or after audit, whichever is later.
69.	Employees' payrolls:	
	a. Since September 1953.	Destroy when 6 years old or after audit, whichever is later.
	b. Prior to September 1953.	Retain.
70.	Cashiers' Daily Cash Reports.	Destroy when 6 years old or after audit, whichever is later.
71.	Surplus commodity cards.	Destroy when 6 years old or after audit, whichever is later.

Items 68-71 superseded by SA-1 JTD 9/12/73