

RECORDS RETENTION

The following operating procedures are in accordance with SP 3580 / AR 3580:

Classification of Records

- Records can be classified into one of three categories:
 - Class 1: Permanent Record
 - Class 2: Optional Record
 - Class 3: Disposable Record
- Permanent records include, but are not limited to; Annual Reports, Office Actions, Personnel Records (Employees, Students), and Property Records.
- Optional records include any record worth keeping which is not classified as Permanent; Optional records shall be retained until re-classified as Disposable.
- Disposable records include all records not classified as Class 1 or 2.
- Refer to AR 3580(a-b) for further detailed guidelines of the type of records included per classification.
- The California Association of School Business Officials (CASBO) publishes a Records Retention Manual, which provides record retention requirements and can also be used as a reference tool when classifying records. The manual can be ordered from their website at: <http://www.casbo.org>

Storage & Retrieval

Currently, the BCOE old Jail building is used to store boxed records. If a department or program has a need to store boxed records, a request for storage can be placed with the Maintenance & Operations (M&O) department by submitting a SchoolDude work order.

*Empty boxes for storage may be obtained by submitting a SchoolDude work order indicating the number of boxes needed.

- The completed “Request for Box Storage” form (BSF-26) must be attached to the SchoolDude work order.
 - As guidance when filling out the form:
 - If it is a Permanent Record, indicate “Class 01” as the “Disposition Code”.
 - If it is a record that can be Disposed, indicate “Class 03” as the “Disposition Code” and then enter the fiscal year it should be disposed of; all files to be destroyed should indicate a **July 1, 20__** disposal date (ie: July 1, 2020).
 - Records for disposal, and permanent records should **NOT** be stored in the same storage box.

- Upon receipt of the SchoolDude work order, the Mail Services Clerk will review the list of records to be stored (for compliance with record retention regulations), and then assign the form a Box Number as part of the Record Retention logging system maintained by M&O for easy tracking and retrieval of records.
- Once the Box Storage request has been assigned a box number, the Mail Services Clerk will print the form, and return to the requesting department to adhere to the box to be stored.
- The Mail Services Clerk will re-assign the SchoolDude work order to an M&O technician for pick-up and delivery of the box (s) to the jail.

Requesting box (s) from storage:

Once the box has been stored in the jail, if a department has a need to retrieve a stored record, a SchoolDude work order needs to be requesting the specific box number needed and where to deliver. If the Box Number is not known, contact the Mail Services Clerk for assistance prior to submitting a work order so that the Record Retention logging system can be researched to find the specific box number needed.

Disposal of Records

- Disposal of stored records is completed annually, in the month of July. Stored records marked for destruction will be shredded, burned, or taken to the local dump and buried.
*If buried, an M&O technician is present to witness the burial, per record destruction regulations.
- Any boxed records that have been destroyed are noted in the Record Retention logging system.