

**RECORD RETENTION AND  
ARCHIVAL OF ELECTRONIC MAIL TRANSMISSIONS**

The clerk of the Board will supervise the management of all records kept by the District. The clerk, under the supervision of the Superintendent, is hereby designated the custodian of all records, documents, writings, letters, memoranda, or other written, typed, copied, or developed materials possessed, assembled, or maintained by the District.

The clerk of the Board, under the supervision of the superintendent, shall receive all subpoenas or all non-routine request for records in the district.

**Record Retention:** The provisions of the Oklahoma Records Management Act do not directly apply to political subdivisions, such as District. However, political subdivisions are required by law to promote the principles of efficient records management for local records, including following the program established for state records as far as is practical. The following recommendations for record retention are primarily based upon the Oklahoma Records Management Act, United States Department of Labor Regulations, Equal Employment Opportunity Commission Regulations, and other state and federal regulations.

<u>Record</u>	<u>Retain</u>
Accident/Incident Reports <ul style="list-style-type: none"><li>• Non-employee accident/incident</li><li>• Employee accident/incident</li></ul>	2 years after accident/incident 5 years after accident/incident
Administrative Records	2 years
Agendas and Minutes <ul style="list-style-type: none"><li>• Audio recording of meetings</li></ul>	Permanent Only until minutes are approved by Board of Education
Benefits information <ul style="list-style-type: none"><li>• Informational materials about employee benefits</li></ul>	3 years after superceded
Bidding Materials <ul style="list-style-type: none"><li>• Requests for Bids/Proposals</li><li>• Bid Documents, including specifications and bids</li><li>• Committee Reports or Recommendations</li></ul>	5 years after completion of project
Calendars/Appointment books	2 years

<p>Contracts</p> <ul style="list-style-type: none"> <li>All District contracts for goods or services, excludes personnel contracts</li> </ul>	5 years after date of conclusion or termination of contract
Collective Bargaining Agreements	Permanent
<p>Correspondence</p> <ul style="list-style-type: none"> <li>General correspondence- paper</li> <li>General correspondence- e-mail</li> <li>Duplicate correspondence, drafts, or other non-records</li> </ul>	<p>3 years</p> <p>5 years</p> <p>Only as long as needed, (ensure office of record retains)</p>
<p>Court Orders</p> <ul style="list-style-type: none"> <li>Issued by judges requiring certain actions by taken by District</li> </ul>	2 years after exhaustion of all legal remedies
<p>Employee Assistance Program Documents</p> <ul style="list-style-type: none"> <li>Information about District's employee assistance program, including handouts and brochures</li> </ul>	3 years after superceded
<p>E-Rate</p> <ul style="list-style-type: none"> <li>technology plans, receipt and delivery records, pre-bidding, bidding, contract documents, application process, invoice documents, and all other such documents</li> </ul>	5 years after last date of service
<p>Federal Funding and Grants</p> <ul style="list-style-type: none"> <li>Records needed to support information provided on an application for federal funding (such as Impact Aid) or private grant</li> </ul>	3 years after fiscal year in which final payment received
<p>Financial Records</p> <ul style="list-style-type: none"> <li>All claims, warrants, contracts, purchase orders, invoices and other records</li> <li>Documents relating to school activity funds</li> <li>Records of bank activity</li> <li>Records relating to audits</li> </ul>	5 years
<p>Fleet Management</p> <ul style="list-style-type: none"> <li>Maintenance Record</li> </ul>	Until vehicle is sold or disposed of
<p>Grievances and Complaints</p> <ul style="list-style-type: none"> <li>Records relating to employee grievances or complaints</li> </ul>	2 years after resolution or conclusion of grievance proceedings
Job Descriptions	3 years after superceded

<p>Litigation Materials</p> <ul style="list-style-type: none"> <li>• Includes case file documents and all other records related to the subject of litigation</li> <li>• Includes Equal Employment Opportunity Commission inquiries and related records</li> </ul>	2 years after litigation has concluded or threat of litigation has passed
Maps of Real Property or District Boundaries	Permanent
Organizational Chart	Until superseded
Payroll records	5 years
<p>Personnel Files</p> <ul style="list-style-type: none"> <li>• Includes applications for employment, regardless of whether the applicant was employed</li> <li>• Includes calculations of accrued but unused sick leave or vacation time</li> </ul>	5 years after termination, resignation, or application; or 2 years after the conclusion of litigation, whichever is later
Policies and Handbooks	Permanent; archive out of date material
Press Releases	3 years
Real Property Records	5 years after the disposition of the property
<p>Safety Records</p> <ul style="list-style-type: none"> <li>• Records maintained pursuant to the Occupational Safety and Health Administration (“OSHA”) or Oklahoma Department of Labor Safety Division</li> </ul>	5 years after the conclusion of the year to which the records relate
<p>Student Records:</p> <ul style="list-style-type: none"> <li>• Transcripts and Scholastic Records<sup>1</sup></li> <li>• Special Education Records Related to Medicaid</li> <li>• Discipline Records</li> <li>• Other Records</li> </ul>	<p>Permanent</p> <p>6 years</p> <p>As needed</p> <p>5 years</p>
<p>Tax documents</p> <ul style="list-style-type: none"> <li>• Forms W-2, W-3, W-4, W-5, W-9</li> <li>• Forms 1099</li> <li>• Forms 941, 944, 945</li> <li>• Quarterly FICA statements</li> <li>• Filed Returns</li> <li>• Reports</li> </ul>	5 years

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<sup>1</sup>Schools must prepare duplicate copies of these records, which must be filed in a separate building from the original, or in a fireproof vault.

Telephone Logs or Message Slips	Only as long as they are needed
Time Sheets/ Time Cards • Includes documents maintained pursuant to Fair Labor Standards Act requirements	3 years after reports accepted or audit
Unemployment Claims • Records relating to unemployment claims	5 years after conclusion
Vacancy Announcements	3 years
Worker's Compensation • Includes summary of work-related injuries and records relating to individuals	5 years

**E-mail Archival And Retrieval:** The District will automatically archive all electronic mail transmissions sent or received from District e-mail addresses. The automatic archival of these e-mail transmissions is intended to assist the District in conducting its official business, investigations, and meeting its legal obligations under state and federal law.

**Access To E-mail Transmissions:** Access to archived e-mail communications shall be limited to authorized District personnel and limited in scope to that which is necessary to aid the District in its investigation or other school business. **Employees must be aware that there is no reasonable expectation of privacy to the contents of any e-mail transmissions sent or received from District e-mail addresses,** and that the contents of all such transmissions may be subject to disclosure pursuant to the Oklahoma Open Records Act, District policy on record retention, and state and federal law.

**Litigation Hold:** If the District becomes aware that litigation is pending or threatened, or if an investigation is being conducted into any student or personnel matter, all records relating to the subject of the litigation or investigation [including e-mails] must be maintained until the District Superintendent or Board of Education has deemed that the litigation or investigation has been resolved and the records are no longer necessary nor reasonably likely to become necessary.

**Open Records:** Materials to which to public has the right of access may be reproduced and provided to any citizen requesting such material in a matter consistent with the Oklahoma Open Records Act, 51 O.S. § 24A.1-29 *et seq.*