

School District/Department Records Retention

revised 2011

Secretary of the Commonwealth/Supervisor of Public Records/Records Management Section/Records Retention Schedule

Series name	Years To Keep	Disposition period	hard copy?	Series number	Legal citation
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ADMINISTRATION

Annual Notice to Public	1	After use.	No	20.001	c.98 s.41
Annual Report of School Committee	100	Permanent (one mint copy).	Yes	20.11	c.72 s.2
Annual Report of School Condition	7	7 years	No	20.12	C.72 s.4
Annual Report of School Returns	100	Permanent (one mint copy).	No	20.13	c.72 s.3
Annual Report of Superintendent of Schools	100	Permanent (one mint copy).	Yes	20.14	c.72 s.2(A)
Correspondence	3	3 years if no informational or evidential value.	No	20.20	
Extended School Year Plan Records	3	3 years.	No	20.40	c.71 s.1, 603 CMR 16.00
Insurance Policies	7	7 years after expiration.	No	20.50	
Minutes of School Committee Meetings	100	Permanent.	Yes	20.60	
Open Meeting Law - Agendas	1	After use.	Yes	1.073	c.30A s.18-25
Open Meeting Law - Meeting Notices	1	After use.	Yes	1.075	c.30A s.18-25
Open Meeting Law - Notice to Individual	6	After use.	Yes	1.076	c.30A s.18-25
Open Meeting Law - Complaints	3	After use.	Yes	1.078	c.30A s.18-25
Printing Request Form	2	After completion of satisfactory audit.	No	20.9	
Regional District Planning Board Agreements	100	Permanent (one mint copy).	Yes	20.10	C.71S.2
Teaching Credentials Evidence	5	5 years after termination of employment.	No	20.30	603 CMR 7.00
Teaching Schedules	2	After use.	No	20.15	

FISCAL

Accounts Payable	2	After completion of satisfactory audit.	No	20.16	
Accounts Receivable	2	After completion of satisfactory audit.	No	20.17	
Annual Audit of Accounts	7	7 years.	No	20.18	c.71 S.16E
Bank Statements	2	After completion of satisfactory audit. (BHRSD maintain	No	20.19	
Bid Specifications and Responses	2	File with Contract Files, see 20.30 for retention period.	No	20.20	C.30B, c.260 s.2
Bills Outstanding, Statements of	2	After completion of satisfactory audit and settlement of l	No	20.21	C.41 s.58
Bond Coupon Statements	2	After completion of satisfactory audit.	No	20.23	
Bond Coupons	7	7 years after cancellation, provided a satisfactory audit ha	No	20.22	
Budget Estimates	2	After use.	No	20.24	
Bus Contracts	2	File with Contract Files, see 20.30 for retention period.	No	20.25	C.30B
Bus Transportation Requests	2	After completion of satisfactory audit.	No	20.26	
Bus Vouchers	7	7 years provided a satisfactory audit has been completed.	No	20.27	
Check Register	2	After completion of satisfactory audit. (BHRSD maintai	No	20.29	
Checks, Accounts Payable, Cancelled	7	7 years, provided a satisfactory audit	No	20.28	c.41 s.35

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Contracts	7	7 years after termination except contracts under seal, then 21 years following termination; unless retained by central purchasing officer, then after termination of contract.	No	20.30	C.30B, c.260 ss.1, 2
Educational Television Program Fund	2	After completion of satisfactory audit.	No	20.31	C.71 S.13(H)
Equipment Inventory Form	5	5 years after retirement of equipment.	No	20.32	
Federal Projects (Title 1, 11, III, IV-B, etc.)	5	5 years provided a satisfactory audit has been completed. (BHRSD maintains 7 years.)	No	20.33	
Invoices	7	7 years after completion of satisfactory audit. 1 year if record copy is kept centrally; e.g., by municipal accountant/auditor.	No	20.35	
Ledger, Agency and Trust Accounts	100	Permanent.	No	20.37	
Purchase Orders	7	File With Contract Files, see. 20.30 for retention period.	No	20.40	C.30B
Purchase Requisitions	4	4 years. If record copy is kept centrally e.g. by Purchasing Dept, Accountant/Auditor, etc., after use.	No	20.41	
Receipts, Daily	2	After completion of satisfactory audit.	No	20.42	c.41 s.35
Receipts, Schedule of	2	After completion of satisfactory audit.	No	20.43	c.41 SS.35, 50
Reimbursement Claims	7	7 years, provided a satisfactory audit has been completed	No	20.44	
School Aid Records	2	After completion of satisfactory audit.	No	20.45	603 CMR 10.03-10.19
Supporting Cost, Allocation and Computation	2	After completion of satisfactory audit,	No	20.46	
Warrants Invoices	2	After completion of satisfactory audit.	No	20.36	

FOOD SERVICE

Breakfast Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34A	603 CMR 32.05(12)
Commodity Distribution Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34B	603 CMR 31.06(13)
Free and Reduced Lunch Eligibility Determination	3	3 years.	No	20.34C	603 CMR 34.07(l(k))
Lunch Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34	603 CMR 29.05(17)

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Milk Program Records	3	3 years after the end of the fiscal year to which they pertain, provided a satisfactory audit has been completed.	No	20.34E	603 CMR 30.13(2)

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Paid Invoices	7	7 years, provided a satisfactory audit has been completed	No	20.34F	
Policies and Memoranda	3	3 years if no informational or evidential value.	No	20.34G	
Reimbursement Claims	7	7 years, provided a satisfactory audit has been completed	No	20.34H	

PAYROLL

Attendance Report - Personnel	2	After completion of satisfactory audit	No	20.50	
Attendance Reports; Substitute Teacher	2	After completion of satisfactory audit.	No	20.55	
Blue Cross, Reports to	2	2 years.	No	20.47	
Checks, Payroll, Cancelled	7	7 years after completion of satisfactory audit.	No	20.48	
Deduction Reports	2	After completion of satisfactory audit.	No	20.49	
Payroll Registers	2	After audit, provided information recorded and kept permanently in Payroll Quarterly Report.	No	20.52	
Payroll Weekly, Biweekly or Monthly	2	After completion of satisfactory audit, arovided recorded elsewhere in a summary record.	No	20.59	
Quarterly Reports	100	Permanent.	No	20.51	
Retirement Board, Reports to	2	After use. (BHRSD maintains 7 years.)	No	20.53	C.32 s.23
Retirement Ledgers	100	Permanent.	No	20.54	C.32 s.20
Tax Exemption Certificate	4	4 years or after use, whichever is later.	No	20.56	
Tax Withholding Statements	4	4 years or after completion of satisfactory audit, whichever is later. (BHRSD maintains 7 years.)	No	20.57	
Vacation Report	3		No	1.09	c.41 s. 111A; C.48, s57
Warrants	2	After completion of satisfactory audit.	No	20.58	c.41 s. 52, 56
Work Sheets	2	After completion of satisfactory audit.	No	20.60	

PERSONNEL

Accident Report Forms	7	7 years, provided no litigation is pending.	No	20.61	
Authorized Leave Report	3		No	1.09	
Employment Applications (Hired)	100	Permanent.	No	20.62A	
Employment Applications (Unhired)	2	2 years.	No	20.62B	
Personnel Files Other than Earning Records	20	20 years after termination of employment.	No	20.62C	
Employment Applications; Substitute Teacher	2	2 years after termination of employment.	No	20.63	
Tuberculosis; Report of School Personnel	3	3 years upon reverification.	No	20.64	c.71 s.55B
Vacancy Postings; Teaching	3	3 years.	No	20.65	

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PHYSICAL PLANT

Building Plans	100	If kept by Building Dept., until sold or demolished. Otherwise, permanent.	No	20.10	
Maintenance Posting Schedule	2	After completion of satisfactory audit.	No	20.80	
Maintenance Work Request Form	2	After completion of satisfactory audit.	No	20.70	

STUDENTS

Academic Program Administration Records	3		No	n/a	
Class Schedule Records	100		Yes	n/a	Permanent
Commencement and Awards Records	100		Yes	n/a	Permanent
Library Borrowers Records	1		No	n/a	
Student Admissions/Registration Records	3		No	n/a	
Student Athletic Participation Records	6		No	n/a	
Student Clubs and Associations Records	6		No	n/a	
Student Counseling Records	6		No	n/a	
Student Disability Records	5		No	n/a	
Student Discipline Records; Expulsion	25		No	n/a	
Student Discipline Records; Routine	3		No	n/a	
Student Graduation Records	100		Yes	n/a	Permanent
Student Health Clinic Records	10		No	n/a	105 CMR 220 MGL 70 34D
Student Immunization Records	10		No	n/a	105 CMR 220 MGL 70 34D
Student Newspaper	100		Yes	n/a	Permanent
Student Record Transcript Requests	1		No	n/a	
Student Scholarships, Fellowships, and Awards	5		No	n/a	
Student Support Services Records	3		No	n/a	
Student Tests and Examinations	1		No	n/a	
Teacher Certification Records	6	6 years after expiration	No	n/a	71 MGL 38G
Tenure and Promotion Records	6		No	n/a	