

RECORDS INVENTORY AND RETENTION SCHEDULE

Department	Item	Office Responsible	Recommended Retention Period
<i>Department of Curriculum and Instruction</i>	Report of Local Expenditures Public Schools (LDS Form 284 10-01/73, DLDS P1)	Fiscal Officer, Div. Of Curriculum & instruction	5 yrs. and until all audit requirements are met
<i>Department of Curriculum and Instruction</i>	NDEA Title III Records - Financial Status Reports, - Fiscal Reports	Fiscal Officer, Office of Assistant Superintendent of Curriculum and Instruction	Permanent or as prescribed by specific regulations
<i>Department of Curriculum and Instruction</i>	Committee Studies, Minutes, and Reports	Assistant Superintendent of Curriculum and Instruction	3 yrs. and until all audit requirements are met
<i>Department of Curriculum and Instruction</i>	Correspondence File	Assistant Superintendent of Curriculum and Instruction	3 yrs. and until all audit requirements are met
<i>Department of Curriculum and Instruction</i>	Instructional Budget Proposals	Assistant Superintendent of Curriculum and Instruction	3 yrs. and until all audit requirements are met
<i>Department of Curriculum and Instruction</i>	Minutes of Advisory and Other Curriculum Committees	Assistant Superintendent of Curriculum and Instruction	3 yrs. and until all audit requirements are met
Department of Curriculum and Instruction	E-mail Correspondence	All Offices	1 year plus current year. Delete electronic version every 90-days as per BCPS protocol.

Revised: 02/18/09

Revised: 08/25/10

Revised: 01/26/12

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Department of Curriculum and Instruction	Reports and Presentations	All Offices	Hard copies for 3 years. Electronic versions automatically deleted every 90-days.
Department of Curriculum and Instruction	Calendars	All Offices	Hard copies for 2 years. Electronic versions deleted as part of year-end procedures.
Department of Curriculum and Instruction	Correspondence File	All Offices	Hard copies for 5 years. Electronic versions deleted as part of year-end procedures.
Department of Curriculum and Instruction	Voicemail	All Offices	Maintain until intended purpose has been served, then delete.
Department of Curriculum and Instruction	Payroll + Notification of Absence Cards	All Offices	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Fiscal records (i.e.. Check requests, pos, + correspondence)	All Offices	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Operating- and Grant-related Fiscal Records Procurement Records (VISA Statements + Supporting Documentation)	All Offices	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Procurement Records (VISA Statements + Supporting Documentation)	All Offices	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Electronic Documents (Misc. Archive)	All Offices	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Field Trip Proposals	All Offices	2 yrs. and until all audit requirements are met.

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Department of Curriculum and Instruction	Charter School Applications	Office of Fine Arts and Social Services	7 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	E-mail Correspondence	All Offices	1 year plus current year. Delete electronic version every 90-days as per BCPS protocol.
Department of Curriculum and Instruction	Reports and Presentations	All Offices	Hard copies for 3 years. Electronic versions automatically deleted every 90-days.
Department of Curriculum and Instruction	Calendars	All Offices	Hard copies for 2 years. Electronic versions deleted as part of year-end procedures.
Department of Curriculum and Instruction	Correspondence File	All Offices	Hard copies for 5 years. Electronic versions deleted as part of year-end procedures.
Department of Curriculum and Instruction	Voicemail	All Offices	Maintain until intended purpose has been served, then delete.
Department of Curriculum and Instruction	MSDE Grant Reports, Notification of Grant Award Letters	Office of Special Education	5 yrs. or until audited.
Department of Curriculum and Instruction	Annual Financial Report of Expenditures	Office of Special Education	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Annual Financial Report of Expenditures	Office of Student Support Services	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Regulations, Guidelines, and Procedures for Supported Programs	Office of Title I	3 yrs. Until superseded
Department of Curriculum and Instruction	Project Financial Status Report-ESEA Title I)CUSP Form 353 04-01/73)	Office of Title I	Permanent or as prescribed by specific regulations.
Department of Curriculum and Instruction	Listing of Identified Children in ESEA Title I Program	Office of Title I	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Application LSCA-Title I-Project VIII (LDS Form 283 14-01/73)	Office of Title I	Permanent or as prescribed by specific regulations.

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Department of Curriculum and Instruction	Application for Federal Library Services & Construction Act Funds-Title I-Services (LDS Form 283 15-08/74)	Office of Title I	Permanent or as prescribed by specific regulations.
Department of Curriculum and Instruction	ESEA Title I School Comparability Report (CUSP Form 353 01-01/73)	Office of Title I	3 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Title I Participation Report	Office of Title I	4 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Title I Comparability Report	Office of Title I	3 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Notification of Grant Award, ESEA Title I	Office of Title I	Permanent or as prescribed by specific regulations.
Department of Curriculum and Instruction	Notification of Grant Award, ESEA, Title I School Improvement	Office of Title I	Permanent or as prescribed by specific regulations.
Department of Curriculum and Instruction	Guidance Counselor Professional Files	Office School Counseling	3 yrs. and until all audit requirements are met.

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Department of Curriculum and Instruction	Referral Forms for Pupil Personnel Services (including Correspondence Relative to Referral, Home Visit Reports, Social Histories, Reports to Community Agencies, Petitions, Reports to District Court, Appeals, Kinships, Hardships, and Interstate Compacts).	Office of Pupil Personnel	Duration of activity + 3yrs
Department of Curriculum and Instruction	Non-Resident Pupil File (including Enrollment Application, Decision Regarding Application)	Office of Pupil Personnel	Duration of activity + 3yrs.
Department of Curriculum and Instruction	Sending Units Report on Tuition (Intercounty Transfers-Report of Tuition) (A&F Form 015 25-01/73)	Office of Pupil Personnel	3 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Receiving Units Report on Tuition (Intercounty Transfers)	Office of Pupil Personnel	3 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Pupil Services Policies and Directives	Office of Pupil Personnel	Permanent
Department of Curriculum and Instruction	Office of Pupil Personnel, Pupil Personnel Work Case Folder File	Office of Pupil Personnel	3 yrs. and until all audit requirements are met.

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Department of Curriculum and Instruction	Assessment Reports	Office of Psychology	Maintain in the Office of Psychological Services for students who have been assessed until age 21; Maintain in storage in the BCPS Warehouse for students who have been assessed through age 25; Shred in BCPS Warehouse for students who have been assessed after age 25.
Department of Curriculum and Instruction	Annual Certification-School Health Services Standards	Office of Health Services	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Budget, Collection Development purchases, Projection Reports, Statements (Hardcopy and ODL server)	Office Digital Learning	7 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Certificates of Completion (Bullying, & Crowd Management) - Hardcopy only	Office Digital Learning	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Liaison Program Files, Presentations and PowerPoints (ODL server only)	Office Digital Learning	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Liaison Meeting Notes (ODL Web site)	Office Digital Learning	5 yrs. and until all audit requirements are met.

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Department of Curriculum and Instruction	Continuing Professional Development Courses (CPD) - CPD materials are found on course specific wikis or Web sites. Basic materials are located on the ODL Wiki	Office Digital Learning	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Library Materials - Library Professional Development Materials are located on the BCPS Librarians Resource-(PD Wiki, some on ODL server)	Office Digital Learning	5 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Confidential Records for Students Documents are in hardcopy form. Report is hardcopy and digital on Assistive Technology server.	Office Assistive Technology	7 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Inventory of Equipment purchased for a student to use. This inventory is digital in the HT Tracker Plus Program.	Office Assistive Technology	7 yrs. and until all audit requirements are met.
Department of Curriculum and Instruction	Resources for teachers to use - visual displays, presentations, and strategies. Documents are digital on Assistive Technology server.	Office Assistive Technology	7 yrs. and until all audit requirements are met.

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