Schedule No. 19

Local Government County Superintendent of Schools Records Schedule

Adopted by the Local Government Records Committee, Oct. 2008 Revision 1 Adopted Oct. 2009

MONTANA LOCAL GOVERNMENT RETENTION SCHEDULE

DEPARTMENT: MACSS- Montana Association of County School Superintendents

ITEM RECORD TITLE AND DESCRIPTION

RETENTION TIME

COMMENTS

1.	ACCREDITATION REPORTS	2 years	
2.	CORRESPONDENCE a. Official b. Routine c. Transitory	a. 5 yearsb. 3 yearsc. Until no longer needed	Offer to Archives
3.	DISTRICT BOUNDARIES a. Abandonment/Consolidation Records b. District Boundary Records c. Territory Transfer Records	a. Permanent b. Permanent c. Permanent	See a. MCA 20-6-421 to 20-6-424 b. MCA 20-6-215 c. MCA 20-6-105
4.	ELECTIONS a. School Election Summaries/Returns b. Trustees Election/Appointment Certificates/Oaths c. Trustee/Board Reorganization	a. Permanentb. Permanentc. Permanent	See MCA 20-20-416 MCA 20-3-307
5.	 FINANCE a. Annual Published Report b. Audit Reports c. Budget Annual Report d. Claims e. County-wide Levy Distribution/ Annual equalization reports f. Medicaid records –Some special ed students g. Office Budget h. Office Receipts/P.O.s i. School Budgets j. School Budget Worksheets k. Trustee Financial Summary l. Warrants m. Warrants Register 	 a. 5 years b. 3 years ** (see last page) c. Permanent d. Audit + 7 years e. Permanent f. 8 years g. 1 year h. 1 year i. 8 years j. 8 years j. 8 years l. 7 years after audit m. 7 years after audit 	See a. MCA 20-3-205 (1)(x) c. & e. May microfilm and destroy. m. This is based on the requirements for school districts
6.	LEGAL CASE FILES a. Hearing Officer Cases	a. 10 years after resolution	See MCA 20-3-210
7.	MINUTES	Permanent	Offer copy to State archives
8.	PERSONNEL a. Annual Data Collection/ADC/Fall Report b. Applications (Teaching, Unsuccessful) c. Personnel Files d. Teacher Certification Lists/Cards e. Teacher Contracts	 a. 5 years b. 3 years c. 10 years after retirement or termination d. Permanent e. 7 years after expiration f. 5 years 	d. MCA 20-4-202

MACSS- Montana Association of County School Superintendents **DEPARTMENT**:

ITEM RECORD TITLE AND DESCRIPTION **RETENTION TIME**

COMMENTS

	f. Unit renewal report g. Grievance issues	g. See item 6 Legal Case Files	
9.	 PUPIL INFORMATION a. Attendance/Tuition Agreements b. Attendance Records c. School Census Data d. Home School Registration/Immunization e. Pupil Data & School Term Report f. Scholarship Record Class III g. Student Records h. Teachers' Registers of Students 	 a. 5 years b. Permanent c. Permanent (a pre-1974 record) d. Permanent* e. Permanent f. Permanent g. Permanent* h. Permanent 	c. no longer created e. no longer created g. MCA 20-1-212(2)
10.	TRANSPORTATION a. Bus Contracts b. Bus Driver List c. Bus Inspections, TR-13 d. Bus Registration, TR-1 e. Bus Reimbursement Claim, TR-6 f. Individual Transportation Claim, TR-5 g. Individual Transportation Contracts/Agreements, TR-4 h. Transportation Committee Minutes	 a. 8 years after expiration b. 2 years c. 5 years d. 5 years e. 5 years f. 5 years g. 8 years after expiration h. Permanent 	

The county superintendent should NOT have home school students' records. We are not their district for the purpose of * records maintenance and storage. The following items should be found in the permanent record held by the school district: Name and address of student Name and address of parent(s) or guardian

Date of birth

Academic work completed

Level of achievement (grades, standardized test score, grade level completed) Immunization record

Attendance data ARM 10.555.909

** Schedule #5 County Accounting/Financial

REV 1. 10-2009

Added: MCA in comments where applicable Item #3- changed MCA's Item #5 a) added (1)(x); and added "c. & e. May microfilm and destroy." 5b) removed "No longer in use" Item #6 added CASE FILES to title; a) changed "Records" to "Cases" Item #7 added "Offer copy to Archives" Item #8 c) changed retention time from 8 to 10 years after retirement or termination; g) Changed "see item 6" to See Item 6 Legal Case Files; Item #9 d) to Home School Registration/Immunization; f) deleted (storage files only);-

DEPARTMENT: MACSS- Montana Association of County School Superintendents

ITEM RECORD TITLE AND DESCRIPTION	RETENTION TIME	COMMENTS
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