

# General Records Retention Schedule

## Office of Catholic Schools

### Diocese of Madison

<u>Type of Record</u>	<u>Length of retention</u>
Attendance Records	Keep for one year after attendance has been recorded in the cumulative record or an annual attendance report has been saved in the SIS (TeacherEase).
Court Orders*	<p>Permanent - These must be kept at all times. Old orders may be destroyed <b>ONLY</b> when new court orders replacing them are received.</p> <ul style="list-style-type: none"><li>• These records should include the student's name, contact - All court orders must be followed explicitly. Parents and/or guardians <b>MUST</b> give explicit written permission to change a provision of a court order (i.e. if a child is ordered to go home only with the mother, the mother would need to give the school written permission if she wanted the father to transport the child.) This written permission <b>MUST</b> be kept in the child's cumulative file.</li><li>• <b>ALL</b> official school communications (newsletters, report cards, progress reports etc.) <b>MUST</b> be sent to <b>ALL</b> of a child's custodial parents and/or legal guardians. This may be done electronically or through traditional mail.</li></ul>
Directory Data	This is recorded on the cumulative file or transcript. The cumulative file and transcript must be kept indefinitely. Once the student graduates or leaves however, all directory data in <u>any other location</u> (beside the cumulative file/transcript) may be destroyed.
Discipline Records	Keep for <u>one year</u> after a student has withdrawn or graduated. These <u>must</u> be destroyed one year after the student has left <u>unless...</u> <ul style="list-style-type: none"><li>- the parent(s) gave written permission to retain the file.</li><li>- the files are germane to a court case or lawsuit.</li><li>- the court has ordered the school to retain the files.</li></ul>
Field-Trip Forms	These may be destroyed after the field-trip has been completed.
Fire Drill Records (school)	Keep for seven (7) years, then destroy/shred.
Health/Medication Records	Keep for one (1) year after the student leaves, then destroy/shred.
Immunization cards*	Keep for seven (7) years after the student leaves, then destroy/shred.

## **Type of Record**

## **Length of retention**

Lead screening records*	Keep for seven (7) years after the student leaves, then shred.
Personnel E-mails*	Keep for seven (7) years after a person has left the employ of the parish. These accumulate during the entire tenure of a person's employment and are not deleted until 7 years after the employee is no longer employed.
Personnel Records*	<p>Permanent – Employee's name, title/job description, and dates of employment</p> <p>All other personnel records should be kept for seven (7) years after a person has left the employ of the parish. This includes:</p> <ul style="list-style-type: none"><li>• Job application</li><li>• Resume and references or letters of recommendation</li><li>• Background checks</li><li>• Immunization and medical records (proof of physical)</li><li>• VIRTUS training records</li><li>• Copies of teaching licenses</li><li>• Catechetical Certification records (SOWDI)</li><li>• Teacher evaluations by the principal</li><li>• Teacher professional development activities</li><li>• Letters of commendation or reprimand</li></ul> <p>All job applications for open positions should be kept for <u>one year</u> after the posting. When you hire someone, their job application becomes part of their personnel file and is kept longer. All other job applications should be kept for one year and then shredded.</p>
Progress Reports	Keep for one (1) year or after grades are recorded on the student's report card, cumulative record, or transcript, then destroy/shred.
Report Cards /Transcript*	<p>Permanent – These should be kept indefinitely.</p> <ul style="list-style-type: none"><li>• These should include the student's name, contact information, grade levels completed, date of entry, and date of withdrawal or graduation. They may also contain attendance information.</li></ul>
Standardized Test Scores	These are classified as "behavior records" and should be destroyed/shredded one (1) year after a student graduates or withdraws. These should NOT be recorded on the student transcript or cumulative record.
Teacher Grade Books	Keep for one (1) year or after grades are recorded on the student's report card, cumulative record, or transcript, then destroy/shred.
Teacher Lesson Plans	Keep for at least seven (7) years.

# Types of Student Records

## **1. Directory Data**

- Name, address, telephone #, date & place of birth, participation in officially recognized activities (sports etc.), weight and height of members of athletic teams, dates of attendance, photographs, degrees and awards received and the name of the school
- May be accessed by anyone, provided that the parents are given official notice that such information will be made available. Parent **MUST** have 14 days from the time of such notice, in which to reply, in writing, should they wish the school not to release the directory data in whole or in part.

## **2. Progress Records**

- Includes grades (transcript or grade card), academic test results, progress reports, report cards, promotion or retention records, attendance record, immunization records and a record of extracurricular activities
- May be accessed by school personnel who work with the pupil, the pupil's parents or guardian, others **WITH** written permission of the parent/guardian.
- These are kept either in an electronic SIS, or in the student's cumulative file. If a school keeps paper copies of students' cumulative files, these should be kept in a locked file cabinet or safe in the school office or principal's office.

## **3. Pupil Physical Health Records**

- *Basic* health information about a child including, immunizations, emergency medical card, athletic permit, lead screening records, screening for vision, hearing or scoliosis, log of medications etc.
- May be accessed by school personnel who work with the pupil, the pupil's parents or guardian, others **WITH** written permission of the parent/guardian.
- All of these records may be kept either in an electronic SIS or in the students' cumulative files.
- Some schools may wish to keep health records apart from cumulative files where they will be more readily accessible to school health care personnel, such as a school nurse. This is permissible as long as the records are kept in a locked file cabinet or safe in a secure location in order to protect confidentiality.

## **4. Behavioral Records**

- Any records relating to pupil behavior (e-mails, phone notes, notes of conversations, etc.), psychological tests, personality tests, law enforcement records.
- These records may be stored in an electronic SIS.
- If a school is storing these records on paper, they may **NOT** be kept in the students' cumulative files. They must be kept in a locked, secure location that is separate from the cumulative files.