

## RECORD MANAGEMENT

### **Classification of Records:**

(California Code of Regulations - Title 5, Sections 16020-16030):

- Class 1 - Permanent Records (as listed in Section 16023): The original, or one exact copy, unless microfilmed, shall be retained indefinitely.
- Class 2 - Optional Records: Not required by law to be retained permanently but Deemed worthy of further preservation as specified in Section 16024.
- Class 3 - Disposable Records: required retention periods and procedures for Destruction or transfer of records as specified in Section 16025.

### **California Code of Regulations - Title 5, Sections 16025**

*All records not classified as Class 1 -Permanent or Class 2 -Optional shall be classified as Class 3 -Disposable, including but not limited to detail records relating to:*

*(a) Records Basic to Audit, including those relating to attendance, average daily attendance, or a business or financial transaction (purchase orders, invoices, warrants, ledger sheets, cancelled checks and stubs, student body and cafeteria fund records, etc.), and detail records used in the preparation of any other report. Teachers' registers may be classified as Class 3 -Disposable only if all information required in Section 432 is retained in other records or if the General Record pages are removed from the register and are classified as Class 1 - Permanent.*

*(b) Periodic Reports, including daily, weekly, and monthly reports, bulletins and instructions.*

### **HISTORY**

*1. Repealer of subsection (c) filed 2-18-71; effective thirtieth day thereafter (Register 71, No. 8).*

*2. Amendment filed 9-27-76; effective thirtieth day thereafter (Register 76, No. 40).*

*This database is current through 8/16/19 Register 2019, No. 33*

*5 CCR § 16025, 5 CA ADC § 16025*

### **Destruction of Records:**

All Class 3 records which have been held for the required retention periods and any permanent records which have been classified as Class 3 after having been duly microfilmed and held for the required retention periods may be destroyed as per Title 5, Sections 16026-16027 of the California Code of Regulations.

The governing board should be notified of pending action to dispose of records, and such notification should be recorded in the board minutes. Notification should also be given to the governing board attesting to the fact that the documents have been properly destroyed. Disposal of records should be accomplished by burning, shredding, pulping or other means to assure complete destruction and to prevent any reconstruction of the records to any degree.

### **Class 3**

The documents on the attached list have been previously classified as Class 3 records. These records have been retained for the legal period of time as per Article 2, Sections 16023-16028 of Title 5, California Code of Regulations. There is no further need to retain these records for use in the SCCOE. The superintendent requests permission to destroy the documents listed above.

**Section 16026. Retention Period**

A Class 3 -Disposable record shall not be destroyed until after the third July 1 succeeding the completion of the audit required by Education Code Section 41020 or of any other legally required audit, or after the ending date of any retention period required by any agency other than the State of California, whichever date is later. A continuing record shall not be destroyed until the fourth year after it has been classified as Class 3 - Disposable.

<b>PURCHASING RECORD RETENTION:</b>					
<b>Retention Code</b>	<b>Area of Responsibility</b>	<b>Title</b>	<b>Classification</b>	<b>Retention Period</b>	<b>Does SCCOE Maintain Documents</b>
CASBO-PUR001	Purchasing	Air Travel Reservations	3	4 Years	These are kept in Accounting
CASBO-PUR002	Purchasing	Purchase Orders (Numerical, Alpha, Blanket, Etc.)	3	4 Years	Yes, in Laserfiche
CASBO-PUR003	Purchasing	Purchasing Bids	3	4 Years	Yes, as hard copies in Purchasing Dept.
CASBO-PUR004	Purchasing	Requisitions	3	4 Years	Yes, in QCC
CASBO-PUR005	Purchasing	Standard School Supplies Agreements	3	4 Years	Yes, in Laserfiche by Risk Management

**Section 16027. Destruction of Records**

Unless otherwise specified in this chapter, all Class 3 -Disposable records shall be destroyed during the third school year after the school year in which they originated (e.g., 1976-77 records may be destroyed after July 1, 198Q).