

County/Local Retention Schedule Instructions

Indiana Archives and Records Administration (IARA) – County/Local Records Management

These instructions apply to all approved County/Local Records Retention Schedules.

- 1) **Officials should first reference their office-specific Retention Schedule.** If no listed Record Series covers the record's subject matter, then refer to the County/Local General Retention Schedule (GEN). If you are still unsure, contact County Records Management at cty@iara.in.gov for assistance.
- 2) **Copy of Record vs. Duplicate:**
 - a) A **Copy of Record** is the copy (or in special circumstances, *copies*) of a record that your agency has chosen to officially fulfill all Records Retention Schedule requirements and any other state or federal rules that affect the record.
 - b) A **Duplicate** is any other version of the record that contains the same information, but is *not* being used to fulfill records retention requirements. Unless the appropriate Record Series specifically states otherwise, Duplicates are considered non-record material and may be destroyed at any time. No permission from IARA or your County Commission of Public Records is required, and no forms need be submitted.
- 3) **Record Series listed on a retention schedule but NOT designated as PERMANENT or CRITICAL :**
 - a) **Any records may be digitized** according to OCPR Policies 20-01 and 20-02 and IARA's Electronic Records Guidelines. Once the electronic records have been verified for completeness and legibility, they can be used as a **Copy of Record** (see Item 2 above), with all records retention schedule instructions applying to them, while the original version becomes a **Duplicate** (see Item 2 above).
 - b) The Copy of Record for these records may be destroyed **ONLY** after they have reached the end of their designated retention period **AND** you have filled out a [Notice of Destruction of County/Local Government Records in Accordance with an Approved Retention Schedule](#) (SF 44905).
 - c) **After destruction**, submit a copy of the completed form to the Secretary of your county Commission of Public Records.
 - d) **If your office would prefer to donate the records to an interested historical entity instead of destroying them**, a SF 57236 must be submitted to IARA and to the county Commission of Public Records, and approval must be received from both parties.
- 4) **Record Series designated as PERMANENT or PERMANENT and CRITICAL** must be preserved permanently, but there are several options for fulfilling this requirement:
 - a) **PERMANENT vs CRITICAL Records**
 - i) **PERMANENT records** are those with long-term or permanent historical value, and must always have at least ONE Copy of Record in existence, in one or more of the locations listed below in item 4c.
 - ii) **CRITICAL records** are those without which the State of Indiana could not properly provide services or document identity and ownership of property. CRITICAL records must always have at least TWO Copies of Record, preferably in two different locations.
 - b) **FORMATS for PERMANENT and CRITICAL RECORDS**
 - i) **The Copy or Copies of Record may remain in the format of creation**, whether that is hard-copy or electronic.
 - ii) **Any records, whether hard copy or electronic, may be microfilmed** according to 60 IAC 2. Once the microfilm has been verified for completeness and legibility, it can be used as a **Copy of Record** (see Item 2 above), with all records retention schedule instructions applying to it, while the original version becomes a **Duplicate** (see Item 2 above).
 - iii) **Any records, whether hard copy or microfilm, may be digitized** according to OCPR Policies 20-01 and 20-02 and IARA's Electronic Records Guidelines. Once the electronic records have been verified for completeness and legibility, they can be used as a **Copy of Record** (see Item 2 above), with all records retention schedule instructions applying to them, while the original version becomes a **Duplicate** (see Item 2 above).
 - iv) IARA's recommended best practice is that one Copy of Record should be physical: either microfilm or paper.

c) **LOCATIONS for PERMANENT and CRITICAL RECORDS**

- i) A Copy of Record may be **maintained permanently in the office of origin.**
- ii) A Copy of Record may be **maintained by a trusted commercial or government records storage provider.**
 - (1) **Records uploaded to a state or federal database cannot be an office's Copy of Record**, unless: the State or Federal entity has volunteered their system as an official repository for such records, the system fulfills the standards of OCPD Policies 20-01 and 20-02 and IARA's Electronic Records Guidelines, AND the county/local office has permanent access to the records if needed.
 - (2) Information typed directly into a state or federal database with no original document on the county/local office's side does not constitute a record for the office.
- iii) **A request to transfer a Copy of Record to the Indiana State Archives** (SF 48883), whether hard copy, microfilmed, or electronic, may be **submitted to IARA** if storage space or ability does not allow for safely maintaining a Copy of Record elsewhere.
 - (1) However, such requests will be approved **only at the discretion of the Indiana Archives**. Title to any record transferred to the Archives transfers along with the record, per Indiana Code 5-15-5.1-11.
 - (2) If, after reviewing the SF 48883, the Indiana Archives cannot or does not wish to collect the records, Indiana Archives staff will advise the office of origin on whether the entire record must be maintained permanently by the office, or if the records may be weeded according to criteria which the Indiana Archives will provide.

5) **Records whose subject matter is not covered by ANY Record Series** on an approved retention schedule may be:

- a) **DESTROYED ONLY** after a [Request for Permission to Destroy Certain Public Records \(PR-1A\)](#) (SF 30505) has been submitted to IARA and to the county Commission of Public Records, and approval has been received from both parties.
 - b) **TRANSFERRED** to the Indiana Archives OR to a local historical entity ONLY after a [Request for Permission to Transfer Certain Public Records \(PR-1B\)](#) (SF 57236) has been submitted to IARA and to the county Commission of Public Records, and approval has been received from both parties.
 - c) **MICROFILMED and/or DIGITIZED: any record maybe microfilmed** according to the standards outlined in 60 IAC 2/Indiana Rules of Court Administrative Rule 6 **or digitized** according to OCPD Policies 20-01 and 20-02, and IARA's Electronic Records Guidelines. Once either format has been verified for completeness and legibility, it can be used as a **Copy of Record (see Item 2 above)**, with all records retention schedule instructions applying to it, while the original version becomes a **Duplicate (see Item 2 above)**.
- 6) **ELECTRONIC RECORDS ASSISTANCE: For any records whose original version is electronic**, or for offices wishing to duplicate records electronically, please **contact IARA's Electronic Records Program** (erecords@iara.in.gov) for additional advice and instructions on preservation.
- 7) **Litigation Holds:** No record may be destroyed or transferred to another entity if any litigation, claim, negotiation, audit, public information request, administrative review, or other action involving the record is initiated or anticipated, even if the record would otherwise be eligible for destruction or transfer. Destruction or transfer may only proceed after the completion of the action and the resolution of all issues that arise from it.
- 8) **ADDITIONAL GUIDELINES**
- a) Any record or file whose contents **fall under more than one Record Series** must be maintained for the **longest applicable retention period**.
 - b) With the exception of RS GEN 10-16 and RS GEN 10-24, **specific forms or reports listed in the description of any Record Series are provided as examples**, not an exclusive or exhaustive list. If a Record Series describes the subject matter of your record, then the Record Series likely covers your record.
 - c) If you are **unsure about whether your records are covered by an existing Record Series**, please contact IARA's County/Local Records Management team (cty@iara.in.gov/317-232-3380) for advice *before* listing the record on a PR-1B (SF 57236).
 - d) **Item Numbers** on this Schedule are used for reading convenience only; **they are not a permanent part of the Record Series**. Copies of this Retention Schedule printed from the IARA website may list the Record Series in a different order due to automated sorting.

Please see IARA's [County/Local Records Custodian Handbook](#) for complete information on proper destruction procedures for eligible records.



TRANSMITTAL OF PROPOSED / APPROVED RECORDS RETENTION AND DISPOSITION SCHEDULE

State Form 39443 (R8 / 9-21)

Agency County/Local Government	Issued by: The Indiana Archives and Records Administration Records Management Division 402 West Washington Street, Room W472 Indianapolis, IN 46204 rmd@iara.in.gov
Division <i>(If left blank, retention schedule applies to entire agency.)</i> Educational Institutions	
Date sent <i>(mm/dd/yyyy)</i> N/A	

SECTION I	PROPOSED RECORDS RETENTION AND DISPOSITION SCHEDULES
Please have your Appointing Authority (agency head) sign this sheet <u>electronically</u> in the blank provided under Section III, to acknowledge approval of the proposed amendments. Then, return the electronic file to IARA's Records Management Division. You will be sent a copy of the final version of the schedule after it has been approved by the Oversight Committee on Public Records.	

SECTION II	GENERAL INFORMATION
An approved Records Retention and Disposition Schedule grants your agency the authority to transfer or destroy records on a continuing basis. Please consult the Records Coordinator and Records Center handbooks for transfer and destruction information, or contact the Indiana Archives or Records Center staff directly for guidance on their specific procedures.	
Any questions concerning how to interpret the instructions in your approved retention schedule should be directed to the Records Management Division at rmd@iara.in.gov.	
A retention schedule must be current to be effective. The Records Management Division will contact your Agency Records Coordinator for periodic reviews to ensure that both language and content are up to date. If your agency needs to change the schedule between those review periods, just contact the Records Management Division, and a new update project will be initiated immediately.	

SECTION III	AGENCY APPROVAL
Agency Head e-signature	Not applicable; IARA acts as agency head.

SECTION IV	APPROVED RECORDS RETENTION AND DISPOSITION SCHEDULES
The Oversight Committee on Public Records, at its meeting held on <u>4/26/2023</u> , approved this Records Retention and Disposition Schedule for your agency.	
The finalized schedule is enclosed. The Records Coordinator should retain the original and forward copies to agency staff as needed.	
Indiana Archives and Records Administration e-signature of final approval	<i>S. Charles Lighty</i>

References: An overview of all updates made in 2023 is provided in Appendix A. A copy of the previous retention schedule is provided in Appendix B -- for reference only. All institutions should use the current edition.

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
ADMINISTRATION			
1	ED 16-017	BUILD - EPA ASBESTOS ABATEMENT RECORDS	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.
2	ED 16-018	BUILD - EPA ASBESTOS INSPECTIONS REPORTS	DESTROY three (3) years after the next re-inspection as required by 40 CFR 763.94.
3	ED 16-019	BUILD - IDEM MONTHLY TREATMENT PLAN LAB REPORTS Sewage treatment.	DESTROY after three (3) years.
4	ED 16-020	BUILD - STATE FIRE MARSHAL ANNUAL SITE INSPECTION REPORTS	DESTROY after three (3) years.
5	ED 16-025	TRANS - BUS SAFETY INSPECTION REPORT (INDIANA STATE POLICE)	DESTROY after three (3) years.
6	ED 16-034	INST - ACHIEVEMENT TEST SCORE SHEET/SCORE BOOKLET Disclosure of these records may be affected by 34 CFR 99.30 through 99.37.	DESTROY after five (5) years.
7	ED 16-047	INST - TITLE I DISTRICT PLAN	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.
8	ED 16-053	COMMUNITY EDUCATION - COURSE DESCRIPTIONS	DESTROY three (3) years after the course is no longer offered.
9	ED 16-054	COMMUNITY EDUCATION – CLASS RECORDS Enrollment forms, evaluations, and other records related to a particular instance (class) of an offered course.	DESTROY after three (3) years.
10	ED 16-056	LISTINGS OF CLASSES	DESTROY when no longer useful.
11	ED 16-057	CURRICULUM - ADOPTED TEXTBOOK LIST	RETAIN through two adoption cycles.
12	ED 16-059	GUIDANCE ACTIVITIES, DECISIONS, AND IN-SERVICE RECORD	DESTROY after FOUR (4) years.
13	ED 16-060	SCHOOL TESTING RESULTS RECORDS	DESTROY after FOUR (4) years.
14	ED 16-061	ACCIDENT REPORT, ANNUAL SUMMARY	DESTROY after five (5) years.
15	ED 16-064	HEARING REPORT (STATE FORM 39986)	DESTROY after five (5) years.
16	ED 16-065	INDIVIDUAL STUDENT CUMULATIVE FILE Records created throughout the lifetime of the student's education; may span from pre-kindergarten through high school graduation or withdrawal, including adult education from approved dual credit courses. May include but is not limited to: testing results, special education, disability plans and services, placement records, record release letters, attendance, extra-curricular activity-related documents, disciplinary records, team and teacher evaluations, and entry/exit interview records. May also include record of student home visits and Preliminary Report of Alleged Child Abuse or Neglect (SF 114). Disclosure of these records may be affected by 34 CFR 99.30 through 99.37. Retention partially based on 34 CFR 300.573.	DESTROY upon the sooner of five (5) years after the provision of educational services to the student, or when services are no longer being provided and destruction is requested by parents or a student over the age of eighteen (18) years old.



EDUCATIONAL INSTITUTIONS RETENTION SCHEDULE (ED)
 INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
17	ED 16-066	<p>INDIVIDUAL STUDENT MEDICAL FILE</p> <p>Medical records created throughout the lifetime of the student's education; may span from kindergarten through high school graduation or withdrawal. Records may include but are not limited to: student alcohol/narcotic screening reports, immunization record and status, list of medications given to student at school, student health screening results, tests, and referrals, record of student insurance coverage, medical examination records, statements of physicians, X-Ray lab reports, request for psychological services and release letter from psychologist.</p> <p>Disclosure of these records may be affected by 34 CFR 99.30 through 99.37, and 45 CFR 160 and 164. Retention partially based on 34 CFR 300.573.</p>	DESTROY upon the sooner of five (5) years after the provision of educational services to the student, or when services are no longer being provided and destruction is requested by parents or a student over the age of eighteen (18) years old.
18	ED 16-080	STUDENT SUMMER SCHOOL REGISTRATION	DESTROY after one (1) year.
SCHOOLS			
19	ED 16-001	ACCIDENT REPORTS	DESTROY after three (3) years.
20	ED 23-001	<p>ATTENDANCE RECORDS</p> <p>School attendance registers, daily slips, summary sheets and other attendance records not specific to an individual student.</p>	DESTROY after three (3) years.
21	ED 16-011	EPA ASBESTOS MANAGEMENT PLAN	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.
22	ED 16-012	SCHOOL SAFETY PLAN	DESTROY when superseded.
23	ED 23-002	<p>SCHOOL EMERGENCY INCIDENTS</p> <p>Records of school actions in emergency situations, as well as reports on whether current safety plans (RS ED-16-012) were or were not followed, or were not applicable in practice. Should include a copy of the current safety plan at the time of the incident.</p>	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.
24	ED 23-003	<p>STUDENT GRADE MANAGEMENT</p> <p>Student grades, whether managed electronically or in a hard copy system. Disclosure of these records may be affected by 34 CFR 99.30 through 99.37.</p>	DESTROY or DELETE information after five (5) years and after final grades are reflected in student's permanent transcript (RS ED-16-028).
25	ED 16-023	<p>PERMANENT RECORD CARDS, GRADUATED AND WITHDRAWN STUDENTS</p> <p>Confidential.</p>	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.
26	ED 16-027	RECORD OF ATHLETIC AWARDS	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.



EDUCATIONAL INSTITUTIONS RETENTION SCHEDULE (ED)
INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
27	ED 16-028	<p>PERMANENT ACADEMIC TRANSCRIPT</p> <p>The official academic record of the courses, credits, and programs completed by a high school student, through graduation or withdrawal from high school.</p> <p>Per IC 20-33-2-13, an official transcript must also include (but is not limited to) credits from any approved dual-credit courses taken at a post-secondary institution; attendance records; immunization information; latest statewide assessment program results; any secondary or postsecondary certificates of achievement earned.</p> <p>Disclosure of these records may be affected by 34 CFR 99.30 through 99.37.</p>	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.
28	ED 16-030	SENIOR AWARDS	PERMANENT. See Retention Schedule Instructions for microfilming and transfer options.
29	ED 16-032	TESTING RESULTS, CLASSROOM AND BUILDING	DESTROY after five (5) years.
30	ED 16-033	STUDENT EMAIL ACCOUNT CONTENTS	DESTROY SIX (6) months after the close of the academic year during which the email was sent or received.
31	ED 16-036	LIB - CIRCULATION RECORDS AND FINE SLIPS	RETAIN until returned or resolved.
32	ED 16-039	LIB - PATRON FILES	DESTROY three (3) years after account becomes inactive.

APPENDIX 1: Record Series Update Overview

THIS IS NOT PART OF THE APPROVED RECORDS RETENTION SCHEDULE. It is only a detachable overview of the updates that were made to the County/Local Educational Institutions Retention Schedule in 2023.

SHADING KEY
This Record Series has a new RS Number on the right, but no other changes.
This Record Series has amendments in addition to the RS Number updates.
This Record Series is deactivated; use the record series on the right instead.
This is a brand new Record Series.

About the new Record Series Numbers: all series remaining on the retention schedule have a new RS Number. The change is only to the alphabetical prefix, which has been simplified from 3 letters (such as EDA, EDC, EDS) to the same 2- letter prefix (ED) for all, to reduce confusion and match the numbering style of all other county/local retention schedules.

No new RS Number ended up being duplicated. For every matching pair that used to exist (such as EDA-16-001 and EDS-16-001), one or both of them was already on the deactivation list or combined into another Record Series.

The guide below lists every "old" RS Number from the previous revision of this schedule, and the updated RS Number to use in the future.

A full copy of the previous retention schedule is also attached after this guide (Appendix 2). That schedule is no longer approved to use, but is provided here for your reference, so that you can review the full descriptions and retention instructions when deciding which updated Record Series applies to your records.

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
EDA-16-001	GEN 23-05
EDA-16-002	GEN 23-06
EDA-16-003	GEN 10-04
EDA-16-004	GEN 10-03 for policy. GEN 10-04 for general files.
EDA-16-005	GEN 10-03
EDA-16-006	GEN 10-27
EDA-16-007	GEN 10-25
EDA-16-008	GEN 10-04
EDA-16-009	GEN 10-03
EDA-16-010	GEN 10-11
EDA-16-011	GEN 20-03
EDA-16-012	GEN 20-04
EDA-16-013	GEN 10-25
EDA-16-014	GEN 10-25
EDA-16-015	GEN 10-25
EDA-16-016	GEN 23-06
EDA-16-017	ED 16-017
EDA-16-018	ED 16-018
EDA-16-019	ED 16-019
EDA-16-020	ED 16-020
EDA-16-021	GEN 10-04
EDA-16-022	GEN 10-04
EDA-16-023	GEN 10-25
EDA-16-024	Nothing; these records are no longer created.
EDA-16-025	ED 16-025
EDA-16-026	Nothing; these records are no longer created.
EDA-16-027	Nothing; these records are no longer created.
EDA-16-028	Nothing; these records are no longer created.
EDA-16-029	GEN 10-05
EDA-16-030	GEN 10-11
EDA-16-031	Nothing; these records are no longer created.
EDA-16-032	ED 16-065
EDA-16-033	GEN 10-03
EDA-16-034	ED 16-034
EDA-16-035	GEN 10-25
EDA-16-036	GEN 10-25
EDA-16-037	GEN 10-25
EDA-16-038	ED 16-065

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
EDA-16-039	ED 16-065
EDA-16-040	GEN 10-25
EDA-16-041	GEN 10-25
EDA-16-042	GEN 20-03
EDA-16-043	GEN 10-27 (individual employees) or GEN 23-05 (general information)
EDA-16-044	GEN 10-25
EDA-16-045	GEN 10-25
EDA-16-046	GEN 10-25
EDA-16-047	ED 16-047
EDA-16-048	GEN 10-25
EDA-16-049	GEN 10-04
EDA-16-050	GEN 10-25
EDA-16-051	GEN 10-25
EDA-16-052	GEN 10-25
EDA-16-053	ED 16-053
EDA-16-054	ED 16-054
EDA-16-055	ED 16-054
EDA-16-056	ED 16-056
EDA-16-057	ED 16-057
EDA-16-058	GEN 20-03
EDA-16-059	ED 16-059
EDA-16-060	ED 16-060
EDA-16-061	ED 16-061
EDA-16-062	GEN 23-05
EDA-16-063	GEN 20-03
EDA-16-064	ED 16-064
EDA-16-065	ED 16-065
EDA-16-066	ED 16-066
EDA-16-067	GEN 23-05
EDA-16-068	GEN 10-27
EDA-16-069	GEN 20-04
EDA-16-070	GEN 10-25
EDA-16-071	GEN 10-25
EDA-16-072	GEN 10-25
EDA-16-073	GEN 10-10
EDA-16-074	GEN 10-04
EDA-16-075	ED 16-065
EDA-16-076	GEN 20-04
EDA-16-077	GEN 20-04
EDA-16-078	Nothing; these records are no longer created.
EDA-16-079	ED 16-028
EDA-16-080	ED 16-080
EDA-16-081	GEN 20-04
EDA-16-082	GEN 10-04
EDS-16-001	ED 16-001
EDS-16-002	ED 23-001
EDS-16-003	ED 23-001
EDS-16-004	ED 23-001
EDS-16-005	GEN 20-03
EDS-16-006	GEN 10-25
EDS-16-007	GEN 20-03
EDS-16-008	GEN 10-04
EDS-16-009	GEN 20-03
EDS-16-010	GEN 10-11
EDS-16-011	ED 16-011
EDS-16-012	ED 16-012
EDS-16-013	GEN 10-04
EDS-16-014	GEN 10-11
EDS-16-015	GEN 10-04
EDS-16-016	GEN 10-11

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
EDS-16-017	GEN 10-11
EDS-16-018	ED 23-003
EDS-16-019	ED 23-003
EDS-16-020	ED 23-003
EDS-16-021	ED 16-065
EDS-16-022	ED 16-065
EDS-16-023	ED 16-023
EDS-16-024	ED 16-065
EDS-16-025	ED 16-066
EDS-16-026	ED 16-066
EDS-16-027	ED 16-027
EDS-16-028	ED 16-028
EDS-16-029	GEN 20-03
EDS-16-030	ED 16-030
EDS-16-031	ED 16-065
EDS-16-032	ED 16-032
EDS-16-033	ED 16-033
EDS-16-034	ED 16-066
EDS-16-035	ED 16-066
EDS-16-036	ED 16-036
EDS-16-037	ED 16-036
EDS-16-038	GEN 10-11
EDS-16-039	ED 16-039
EDS-16-040	GEN 10-25
EDS-16-041	GEN 10-25
EDS-16-042	GEN 10-43
EDS-16-043	GEN 10-04
EDS-16-044	GEN 10-04
EDS 16-045	GEN 10-27
EDC-16-001	GEN 10-03
EDC-16-002	GEN 10-11
EDC-16-003	GEN 10-03

NEW RECORD SERIES	CREATED FOR...
ED 23-001	Attendance Records
ED 23-002	School Emergency Incidents
ED 23-003	Student Grade Management


SUMMARY
<p>Only RS# changed: EDA-16-018, EDA-16-019, EDA-16-020, EDA-16-025, EDA-16-056, EDA-16-057, EDA-16-059, EDA-16-060, EDA-16-064, EDS-16-001, EDS-16-012, EDS-16-033.</p> <p>Amended in addition to RS#: EDA-16-017, EDA-16-034, EDA-16-047, EDA-16-053, EDA-16-054, EDA-16-061, EDA-16-065, EDA-16-066, EDA-16-080, EDS-16-011, EDS-16-023, EDS-16-027, EDS-16-028, EDS-16-030, EDS-16-032, EDS-16-036, EDS-16-039.</p> <p>Deactivated: EDA-16-001, EDA-16-002, EDA-16-003, EDA-16-004, EDA-16-005, EDA-16-006, EDA-16-007, EDA-16-008, EDA-16-009, EDA-16-010, EDA-16-011, EDA-16-012, EDA-16-013, EDA-16-014, EDA-16-015, EDA-16-016, EDA-16-021, EDA-16-022, EDA-16-023, EDA-16-024, EDA-16-026, EDA-16-027, EDA-16-028, EDA-16-029, EDA-16-030, EDA-16-031, EDA-16-032, EDA-16-033, EDA-16-035, EDA-16-036, EDA-16-037, EDA-16-038, EDA-16-039, EDA-16-040, EDA-16-041, EDA-16-042, EDA-16-043, EDA-16-044, EDA-16-045, EDA-16-046, EDA-16-048, EDA-16-049, EDA-16-050, EDA-16-051, EDA-16-052, EDA-16-055, EDA-16-058, EDA-16-062, EDA-16-063, EDA-16-067, EDA-16-068, EDA-16-069, EDA-16-070, EDA-16-071, EDA-16-072, EDA-16-073, EDA-16-074, EDA-16-075, EDA-16-076, EDA-16-077, EDA-16-078, EDA-16-079, EDA-16-081, EDA-16-082, EDC-16-001, EDC-16-002, EDC-16-003, EDS-16-002, EDS-16-003, EDS-16-004, EDS-16-005, EDS-16-006, EDS-16-007, EDS-16-008, EDS-16-009, EDS-16-010, EDS-16-013, EDS-16-014, EDS-16-015, EDS-16-016, EDS-16-017, EDS-16-018, EDS-16-019, EDS-16-020, EDS-16-021, EDS-16-022, EDS-16-024, EDS-16-025, EDS-16-026, EDS-16-029, EDS-16-031, EDS-16-034, EDS-16-035, EDS-16-037, EDS-16-038, EDS-16-040, EDS-16-041, EDS-16-042, EDS-16-043, EDS-16-044, EDS 16-045</p> <p>Brand New: ED 23-001, ED 23-002, ED 23-003</p>

If you have questions about this overview or about the County/Local General Retention Schedule, please contact IARA's County Records Management section at 317-232-3380 or cty@iara.in.gov.

APPENDIX 2: 2016 EDITION – NO LONGER APPROVED – FOR REFERENCE ONLY

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
ADMINISTRATION		
EDA-16-001	ADMIN - ABSENCE RECORD, DAILY	DESTROY after one (1) year.
EDA-16-002	ADMIN - ABSTRACTS/DEEDS/ TITLE PAPERS/MORTGAGES	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-003	ADMIN - CALENDAR, FOR STAFF AND CURRICULUM	DESTROY after three (3) years or STATE BOARD OF ACCOUNTS Audit, whichever is later.
EDA-16-004	ADMIN CORRESPONDENCE Includes email. Principals, counselors, non-teaching administrative staff.	Except where otherwise provided in the general retention schedule or this schedule (see: Record Series EDA 16-004), DESTROY after five (5) years.
EDA-16-005	SUPERINTENDENT CORRESPONDENCE Documents major functions, activities, programs, decision and policy making, important events in school district's history. Confidential.	PERMANENT. Transfer electronically to the INDIANA ARCHIVES AND RECORDS ADMINISTRATION or MICROFILM according to 60 IAC 2 STANDARDS or retain Original in office, or transfer to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-006	ADMIN - EVALUATIONS OF ADMINISTRATORS	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the Indiana ARCHIVES AND RECORDS ADMINISTRATION after microfilming.
EDA-16-007	ADMIN - GRANT APPLICATIONS, APPROVED	DESTROY three (3) years after the end of the grant period or STATE BOARD OF ACCOUNTS audit, whichever is later.
EDA-16-008	ADMIN - GRANT APPLICATIONS, NOT APPROVED	DESTROY after three (3) years.
EDA-16-009	ADMIN - POLICY BOOK	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the Indiana ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-010	ADMIN - PROOF OF PUBLICATION FILES	DESTROY after three (3) years or STATE BOARD OF ACCOUNTS audit, whichever is later.
EDA-16-011	ADMIN - PUBLICATIONS ISSUED BY CORPORATION	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
EDA-16-012	ADMIN - SCHOOL REPORT CARD, ANNUAL PERFORMANCE REPORT; ANNUAL FINANCIAL REPORT; GATEWAY FINANCIAL REPORT	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-013	BUILD - CONTRACTED WORK ORDERS	DESTROY three (3) years after completion of construction project.
EDA-16-014	BUILD - CORRESPONDENCE, CONSTRUCTION PROJECTS	DESTROY three (3) years after completion of construction project.
EDA-16-015	BUILD- DRAWINGS, BLUEPRINTS, SPECIFICATIONS Planned design drawings.	DESTROY when no longer useful.
EDA-16-016	BUILD - DRAWINGS, BLUEPRINTS, SPECIFICATIONS As built drawings	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-017	BUILD - EPA ASBESTOS ABATEMENT RECORDS	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-018	BUILD - EPA ASBESTOS INSPECTIONS REPORTS	DESTROY three (3) years after the next re-inspection as required by 40 CFR 763.94.
EDA-16-019	BUILD - IDEM MONTHLY TREATMENT PLAN LAB REPORTS Sewage treatment.	DESTROY after three (3) years.
EDA-16-020	BUILD - STATE FIRE MARSHAL ANNUAL SITE INSPECTION REPORTS	DESTROY after three (3) years.
EDA-16-021	FOOD - FOOD SERVICES GUIDELINES	DESTROY when superseded.
EDA-16-022	FOOD - MENUS/DAILY PRODUCTION SHEETS	DESTROY after five (5) years.
EDA-16-023	FOOD - MILK AND BREAD BIDS	DESTROY after five (5) years or STATE BOARD OF ACCOUNTS Audit, whichever is later.
EDA-16-024	TRANS - BUS CONDUCT REPORT	DESTROY after one (1) year.
EDA-16-025	TRANS - BUS SAFETY INSPECTION REPORT (INDIANA STATE POLICE)	DESTROY after three (3) years.
EDA-16-026	TRANS - FIELD TRIP REPORTS	DESTROY after three (3) years.
EDA-16-027	TRANS - FORM DOE-TN Indiana, replaces EIR-5 form.	DESTROY after five (5) years.
EDA-16-028	TRANS - FORM 32-9 (IN)	DESTROY after five (5) years.
EDA-16-029	STU - CORRESPONDENCE, LITIGATION, STUDENT	RETAIN until final disposition of all litigation and appeals.
EDA-16-030	STU - ENROLLMENT REPORT (SIX WEEKS)	DESTROY after five (5) years.
EDA-16-031	STU - ENUMERATION FOR SCHOOL PURPOSES	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.


EDUCATIONAL INSTITUTIONS RETENTION SCHEDULE (ED)
INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
EDA-16-032	STU - STUDENT DUE PROCESS FILES (EXPULSION RECORD) Confidential.	DESTROY after five (5) years.
EDA-16-033	STU - STUDENT HANDBOOKS	DESTROY after seven (7) years.
EDA-16-034	INST - ACHIEVEMENT TEST SCORE SHEET/SCORE BOOKLET Confidential.	DESTROY after five (5) years.
EDA-16-035	INST - CHAPTER I OR TITLE I GRANT AGREEMENT LETTER	RETAIN as required by grant agreement or DESTROY ten (10) years after the conclusion of the grant, whichever is longer.
EDA-16-036	INST - ANNUAL PROJECT EVALUATION (END GRANT CYCLE)	DESTROY ten (10) years after the conclusion of the grant.
EDA-16-037	INST - COMPARABILITY REPORT	DESTROY after five (5) years.
EDA-16-038	INST - COORDINATION RECORD, STUDENT Confidential.	DESTROY after five (5) years.
EDA-16-039	INST - HOME VISIT DOCUMENTATION	DESTROY after five (5) years
EDA-16-040	INST - LOSS AND GAIN FORM Achievement Data. Confidential.	DESTROY after five (5) years.
EDA-16-041	INST - NEEDS ASSESSMENT RANKING REPORT	DESTROY after five (5) years.
EDA-16-042	INST - NEWSLETTER, ALL FORMATS INCLUDING WRITTEN AND ELECTRONIC Includes official announcements made on a social media platform. (District/Schoolwide).	PERMANENT. May MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-043	INST - PROFESSIONAL DEVELOPMENT INFORMATION	DESTROY after three (3) years or STATE BOARD OF ACCOUNTS Audit, whichever is later. Records noting individual staff training should be transferred to the individual's permanent record.
EDA-16-044	INST - PROJECT\PROGRAM APPLICATION AND AMENDMENTS	DESTROY after five (5) years.
EDA-16-045	INST - QUARTERLY MONITORING REPORT	DESTROY after five (5) years.
EDA-16-046	INST - TARGET AREA SELECTION REPORT	DESTROY after five (5) years.
EDA-16-047	INST - TITLE I DISTRICT PLAN	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-048	INST - TITLE I BUILDING LEVEL PLAN	DESTROY after five (5) years.
EDA-16-049	INST - WEEKLY WORK SCHEDULE	DESTROY after five (5) years.
EDA-16-050	TITLE 6- APPLICATION FOR FUNDS FOR EDUCATIONAL PROGRAMS UNDER P.L.97-35 (PROGRAM PLAN)	DESTROY after five (5) years.
EDA-16-051	TITLE 6 - CHAPTER 2 BUDGET AND EXPENDITURE REPORT	DESTROY after five (5) years or STATE BOARD OF ACCOUNTS Audit, whichever is later.
EDA-16-052	TITLE 6 - EVALUATION REPORT FOR CHAPTER 2 PROGRAMS	DESTROY after five (5) years.
EDA-16-053	COMM ED - COURSE DESCRIPTIONS	DESTROY three (3) years after the course is no longer offered.
EDA-16-054	COMM ED - ENROLLMENT FORMS	DESTROY after one (1) year.
EDA-16-055	COMM ED - EVALUATION OF CLASS	DESTROY after three (3) years.
EDA-16-056	LISTINGS OF CLASSES	DESTROY when no longer useful.

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
EDA-16-057	CURRICULUM - ADOPTED TEXTBOOK LIST	RETAIN through two adoption cycles.
EDA-16-058	CURRICULUM- HIGH SCHOOL COURSE DESCRIPTION BOOKLETS	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-059	GUIDANCE ACTIVITIES, DECISIONS, AND IN-SERVICE RECORD	DESTROY after FOUR (4) years.
EDA-16-060	SCHOOL TESTING RESULTS RECORDS	DESTROY after FOUR (4) years.
EDA-16-061	ACCIDENT REPORT, ANNUAL SUMMARY	DESTROY after three (3) years.
EDA-16-062	FACULTY/STAFF HEALTH TRAINING - SIGN IN SHEET	DESTROY after three (3) years.
EDA-16-063	INST- SCHOOL NEWSPAPER	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-064	HEARING REPORT (STATE FORM 39986)	DESTROY after five (5) years.
EDA-16-065	<p>INDIVIDUAL STUDENT FILE</p> <p>Includes but not limited to: Testing Results Records (ISTEP, CAT, SAT, ACT, EPSF), Multidisciplinary Team Evaluation Reports, Case Conference Committee Summaries, Individualized Education Plans, Transition Plans, Correspondence, Pertinent information regarding the student's educational placement, release letters for outside agencies to view student records, test protocol on student, documentation of student program and attendance record, student exit/drop-out interview, student selection form (includes test scores, teacher referrals), teacher's evaluation of student/comments record, record of student home visits, and Report of Alleged Child Abuse or Neglect (State Form 114R2). Confidential. Includes Adult Education records.</p>	Records are maintained 5 years beyond the provision of educational services to the student OR until the student reaches 21 years of age, whichever is less, if the parents have not requested destruction of the records. 34 CFR 300.573 permits parents to request the destruction of personally identifiable information on their child. The parent must be informed of the destruction option (generally at graduation.) If parents request the information destroyed, the agency may retain a permanent record of a student's name, address, phone #, his or her grades, attendance record, classes attended, grade level and year completed.
EDA-16-066	<p>INDIVIDUAL STUDENT MEDICAL FILE</p> <p>Includes but not limited to: student alcohol/narcotic screening reports, immunization record and status (includes State Form 22363-Kindergarten and State Form 2263NE), list of medications given to student at school, student health screening results, tests, and referrals, record of student insurance coverage, medical examination records, statements of physicians, X-Ray Lab reports, request for psychological services and release letter from psychologist. Confidential.</p>	Records are maintained 5 years beyond the provision of educational services to the student OR until the student reaches 21 years of age, whichever is less, if the parents have not requested destruction of the records. 34 CFR 300.573 permits parents to request the destruction of personally identifiable information on their child. The parent must be informed of the destruction option (generally at graduation.) If parents request the information destroyed, the agency may retain a permanent record of a student's name, address, phone #, his or her grades, attendance record, classes attended, grade level and year completed.
EDA-16-067	UNIVERSAL PRECAUTIONS TRAINING FOR EMPLOYEES, SIGN-IN SHEET	DESTROY after three (3) years.

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
EDA-16-068	AGREEMENT TO SAFEGUARD INFORMATION	MAINTAIN copy in staff member's personnel file after staff member leaves program or school district employment.
EDA-16-069	ANNUAL DATA REPORT - EDUCATION OF THE HANDICAPPED	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-070	APPLICATION FOR FEDERAL ASSISTANCE FOR THE EDUCATION OF HANDICAPPED	DESTROY after five (5) years.
EDA-16-071	APPLICATION FOR TENTATIVE APPROVAL FOR ANNUAL CLASSROOM UNITS FOR EXCEPTIONAL CHILDREN	DESTROY after five (5) years.
EDA-16-072	QUARTERLY SUMMARY REPORT-EDUCATION OF THE HANDICAPPED	DESTROY after five (5) years and STATE BOARD OF ACCOUNTS audit.
EDA-16-073	APPLICATION FOR SUMMER SCHOOL (STATE REPORT)	DESTROY after three (3) years and STATE BOARD OF ACCOUNTS audit.
EDA-16-074	SUMMER - APPROVAL LETTER	DESTROY after three (3) years and STATE BOARD OF ACCOUNTS audit.
EDA-16-075	SUMMER - ATTENDANCE RECORDS	DESTROY after information is transferred to student's record.
EDA-16-076	SUMMER - CORPORATION ISTEP RE-MEDIATION AND RETENTION SUMMARY	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-077	SUMMER- ISTEP FINAL REPORTING FORM	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-078	SUMMER - ISTEP PRELIMINARY REPORTING FORM	DESTROY after three (3) years.
EDA-16-079	SUMMER - STUDENT GRADE REPORT Confidential.	DESTROY after grades are transferred to student's permanent record.
EDA-16-080	STUDENT SUMMER SCHOOL REGISTRATION	DESTROY after one (1) year.
EDA-16-081	SUMMER SCHOOL FINAL REPORT	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDA-16-082	SUMMER SCHOOL INFORMATION SHEET (LETTER TO PARENT)	DESTROY after one (1) year.

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
SCHOOLS		
EDS-16-001	ACCIDENT REPORTS	DESTROY after three (3) years.
EDS-16-002	ATTENDANCE REGISTERS	DESTROY after three (3) years.
EDS-16-003	ATTENDANCE SLIPS, DAILY	DESTROY after three (3) years.
EDS-16-004	ATTENDANCE SUMMARY SHEETS, DAILY	DESTROY after three (3) years.
EDS-16-005	COMMENCEMENT PROGRAMS	TRANSFER one copy to the INDIANA ARCHIVES AND RECORDS ADMINISTRATION after three YEARS and completion of STATE BOARD OF ACCOUNTS Audit. DESTROY any remaining copies.
EDS-16-006	ENROLLMENT REPORTS	DESTROY after three (3) years.
EDS-16-007	NEWSPAPERS/NEWSLETTERS, ALL FORMATS INCLUDING WRITTEN AND ELECTRONIC Includes official announcements made on a social media platform. (Includes team newsletters to parents).	PERMANENT. May MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-008	SUBJECT FILES	DESTROY after three (3) years.
EDS-16-009	YEARBOOKS	PERMANENT. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-010	BOOK AND EQUIPMENT INVENTORY	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-011	EPA ASBESTOS MANAGEMENT PLAN	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-012	SCHOOL SAFETY PLAN	DESTROY when superseded.
EDS-16-013	USE OF BUILDING FORMS	DESTROY after three (3) years.
EDS-16-014	DAILY SCHOOL LUNCH REPORTS	DESTROY after five (5) years.
EDS-16-015	NOTIFICATION LETTERS FOR SCHOOL MEALS	DESTROY after three (3) years and completion of STATE BOARD OF ACCOUNTS audit.
EDS-16-016	RECORD OF CHARGED LUNCHES	DESTROY after five (5) years.
EDS-16-017	WEEKLY SCHOOL LUNCH REPORT	DESTROY after five (5) years.
EDS-16-018	GRADE BOOKS Confidential.	DESTROY after five (5) years.
EDS-16-019	GRADE SHEETS, CUMULATIVE BY SEMESTER Confidential.	DESTROY after three (3) years.
EDS-16-020	GRADE SHEETS, SIX WEEK Confidential.	DESTROY after three (3) years.



EDUCATIONAL INSTITUTIONS RETENTION SCHEDULE (ED)
 INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
EDS-16-021	LETTER OF ABSENCE RECORD TO PARENTS Confidential.	DESTROY after three (3) years.
EDS-16-022	NOTICE OF SUSPENSION Confidential.	DESTROY three (3) years after student is no longer enrolled.
EDS-16-023	PERMANENT RECORD CARDS, GRADUATED AND WITHDRAWN STUDENTS Confidential.	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-024	ATHLETIC ELIGIBILITY CERTIFICATES May be confidential.	DESTROY after three (3) years.
EDS-16-025	ATHLETIC INSURANCE RECORDS May be confidential.	DESTROY after SEVEN (7) years.
EDS-16-026	ATHLETIC - PARENT-PHYSICIAN CERTIFICATION May be confidential.	DESTROY after five (5) years.
EDS-16-027	RECORD OF ATHLETIC AWARDS	PERMANENT. May MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-028	CUMULATIVE RECORD/PERMANENT RECORD Confidential. Includes Adult Education records.	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-029	ANNUAL LIST OF GRADUATE AND WITHDRAWN STUDENTS Confidential.	PERMANENT. MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-030	SENIOR AWARDS	PERMANENT. May MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDS-16-031	STUDENT ACTIVITY SHEETS	RETAIN for 5 years after student leaves the school system.
EDS-16-032	TESTING RESULTS RECORDS, CLASSROOM AND BUILDING ISTEP, CAT, SAT, ACT, EPSF.	DESTROY after five (5) years.
EDS-16-033	STUDENT EMAIL ACCOUNT CONTENTS	DESTROY SIX (6) months after the close of the academic year during which the email was sent or received.



EDUCATIONAL INSTITUTIONS RETENTION SCHEDULE (ED)
 INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
EDS-16-034	PARENT REQUEST AND PERMISSION TO ADMINISTER MEDICATION, INCLUDING PARENT NOTES Confidential.	DESTROY after three (3) years.
EDS-16-035	PSYCHOLOGICAL REPORTS INCLUDING FOLLOW-UP REPORTS Confidential.	DESTROY after three (3) years.
EDS-16-036	LIB - CIRCULATION RECORDS	RETAIN until returned.
EDS-16-037	LIB - FINE SLIPS	RETAIN until resolved.
EDS-16-038	LIB - MATERIALS INVENTORY	DESTROY after five (5) years or STATE BOARD OF ACCOUNTS Audit, whichever is later.
EDS-16-039	LIB - PATRON FILES	RETAIN until replaced or inactive.
EDS-16-040	LIB - TITLE II APPLICATION	DESTROY after FOUR (4) years.
EDS-16-041	LIB - TITLE II INVENTORY & EVALUATION	DESTROY after FOUR (4) years
EDS-16-042	SCHOOL PREMISES, BUS, OR SCHOOL-OWNED PROPERTY VIDEO SURVEILLANCE	DESTROY after 30 days.
EDS-16-043	FACULTY/STAFF CORRESPONDENCE	DESTROY after three (3) years.
EDS-16-044	FACULTY/STAFF EMAIL	Except where otherwise provided in the general retention schedule or this schedule, DESTROY after three (3) years.
EDS-16-045	LESSON PLANS	DESTROY 6 months after conclusion of academic year or when no longer useful, whichever is later.
CHARTER SCHOOLS		
EDC-16-001	CHARTER AGREEMENT	PERMANENT. May MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.
EDC-16-002	FINANCIAL REPORTING REQUIREMENTS Includes tax forms, required reports to agencies, includes state and federal requirements.	Except where otherwise provided in the general retention schedule or this schedule, DESTROY after SIX (6) years.
EDC-16-003	GOVERNING DOCUMENTS AS REQUIRED BY IC § 20-24-3-3	PERMANENT. May MICROFILM according to 60 IAC 2 STANDARDS. Original may be retained in office, transferred to the County Archives or destroyed upon receipt of written approval from the INDIANA ARCHIVES AND RECORDS ADMINISTRATION.