

Accounting & Budget Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
	3	Accounts Payable Reconciliation	3 Years	4 Years	Fiscal Accountability	--	--
	3	Accounts Receivable Reconciliation	3 Years	4 Years	Fiscal Accountability	--	--
SACS (J-200/300) (J141)(J41)	1	Annual Financial and Budget Report	Permanent	Permanent		4 Years	Permanent
SACS (J-400/500)		County Superintendent of Schools					
SACS (J-600/700)	1	Annual Financial and Budget Report, Joint Powers Agencies	Permanent	Permanent		4 Years	Permanent
SACS (J-301-CE)	1	Annual Financial Report- Continuation Education Schools	Permanent	Permanent		4 Years	Permanent
	2	Annual IMF Statement, Optional Cash Request (Credit Districts)	4 Years	5 Years	Final Audit	--	--
	2	Annual Interest Accrued by Direct Order School Districts on K-8 Instructional Materials Fund	4 Years	5 Years	Final Audit	--	--
SACS (J-780)	1	Annual Program Cost Data Report, Joint Powers Agencies	Permanent	Permanent		4 Years	Permanent
SACS (J-380)	1	Annual Program Cost Data Report, Single District	Permanent	Permanent		4 Years	Permanent
C-1- A	1	Annual Report for Cal-SAFE Child Care Funding	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A)	1	Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A)	1	Annual Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
J-50-A	1	Annual Report for Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
SACS - SEA (J-201SEA)	1	Special Education Revenue Allocation	Permanent	Permanent		4 Years	Permanent
SACS (J-200/300) (J-44)	1	Annual Report of Abatements of Expenditures	Permanent	Permanent		4 Years	Permanent
(J-43-A)	1	Annual Report of Accounts Receivable	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19C-A) (1-19 A) Suppl (County)	1	Annual Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-18-A Supp)	1	Annual Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-19-A Supp)	1	Annual Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-19E-A)	1	Annual Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-18-A)	1	Annual Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-18-A Supp)	1	Annual Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A)	1	Annual Report of Attendance for Special Programs	Permanent	Permanent		4 Years	Permanent
B - A	1	Annual Report of Attendance for Students Enrolled in District Cal-SAFE Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A)	1	Annual Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
J-43	1	Annual Report of Current Liabilities	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Accounting & Budget Records... continued

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			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
St Software (J-18/19-A)	1	Annual Report of Attendance for Supplement Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J18/19CH-A)	1	Annual Report of Charter School ADA Funded Through Revenue Limits (E.C.42238)	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-C-A (J-18-A Supp))	1	Annual Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent
SACS -TRAN (J-141)	1	Annual Report of Pupil Transportation Expense	Permanent	Permanent		4 Years	Permanent
SACS-TRAN J-141ROC/P	1	Annual Report of ROC/P Transportation	Permanent	Permanent		4 Years	Permanent
SACS-TRAN (J-141-S)	1	Annual Report of Special Education Transportation Expense	Permanent	Permanent		4 Years	Permanent
	1	Annual School District Audit Reports	Permanent	Permanent		4 Years	Permanent
VE-1,SDE100 SDE-100A,B JTPA FORM, SDE-101A & SDE-103	2	Application for Allocated Federal Vocational Education Funds	5 Years	6 Years	(A)	--	--
J-22.4	1	Application for Allowance for the Cost of Educating Exceptional Children Away from the District of Residence	Permanent	Permanent		4 Years	Permanent
	3	Application for Approval of Elementary and High School Summer School	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-1703	2	Application for Capital Outlay Funds for Family Child Care Homes	4 Years	5 Years	Final Audit	--	--
J-16	1	Application for District Authority for Issuance of Warrants	Permanent	Permanent		4 Years	Permanent
I-111	1	Application for Exemption from the Classroom Teacher Salary Limitation	Permanent	Permanent		4 Years	Permanent
SDE-100	2	Application for Funding: Consolidated Categorical Aid Programs	4 Years	5 Years	Final Audit	--	--
CD-9725 CD-3704	2	Application for Funds to Provide Child Care and Development Services	4 Years	5 Years	Final Audit	--	--
CD-1706	2	Application for Revolving Loan Fund	4 Years	5 Years	Final Audit	--	--
J-PCP	1	Application for Special Allowance for Project-Connected Pupils	Permanent	Permanent		4 Years	Permanent
	3	Application for the 1999-2000 Jack O'Connell Beginning-Teacher Salary Incentive Program Education Code Section 45023.4	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Application for the 2000-2001 Beginning Teacher Minimum Salary Program Education Code Section 45023.1	3 Years	4 Years	Timing/Fiscal Year	--	--
2VEA-1	2	Application for VEA Funds - Basic Grant	5 Years	6 Years	(A)	--	--
SAVEA-1	2	Application for VEA Funds - Consumer and Homemaking Education - Basic Grant	5 Years	6 Years	(A)	--	--
SBVEA-1	2	Application for VEA Funds - Consumer and Homemaking Education - Economically Depressed Area Program/Services	5 Years	6 Years	(A)	--	-
3VEA-1	2	Application for VEA Funds - Program Improvement and Supportive Service	5 Years	6 Years	(A)	--	--
4VEA-1	2	Application for VEA Funds-Special Programs for the Disadvantaged	5 Years	6 Years	(A)	--	--
	3	Appropriation Ledger	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- - Feasibility to Microfilm at District Discretion

(A) - Final Audit - ref: Voc Ed Financial Report and Claim for Funds

Accounting & Budget Records... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CD-9502	1	Attendance and Fiscal Reports for Alternative Payment and Child Protective Services Program	Permanent	Permanent		4 Years	Permanent
CD-9501	1	Attendance and Fiscal Report for Child Care and Development Program	Permanent	Permanent		4 Years	Permanent
CD-9500	1	Attendance and Fiscal Report for Child Development Program	Permanent	Permanent		4 Years	Permanent
CD-9501	1	Attendance and Fiscal Report for County Welfare Departments	Permanent	Permanent		4 Years	Permanent
CD-9516	1	Attendance and Fiscal Reports for School-age Community Child Care Programs	Permanent	Permanent		4 Years	Permanent
CD-9517	1	Attendance and Fiscal Report for School-age Community Child Development Programs Alternative Payment	Permanent	Permanent		4 Years	Permanent
CD-6507	1	Attendance and Fiscal Reports for School-age Parenting and Infant Development Programs	Permanent	Permanent		4 Years	Permanent
CD-1400	1	Attendance and Fiscal Reports for Special Programs for the Severely Handicapped	Permanent	Permanent		4 Years	Permanent
CD-8501	1	Attendance and Fiscal Report for State Preschool Programs	Permanent	Permanent		4 Years	Permanent
J-73-A1	3	Audio-Visual Worksheet for the County School Service Fund	3 Years	4 Years	Fiscal Accountability	--	
	1	Auditor's Report	Permanent	Permanent		4 Years	Permanent
	1	Audits for Child Development Programs Administered by Private Non-Profit and Public Agencies	Permanent	Permanent		4 Years	Permanent
	(a)	Bank Deposit Slips	(a)	1 Year	Audit Purposes	--	--
	3	Bank Reconciliation and Canceled Checks	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-9725 CD-2405	3	Budget Worksheet	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Cash Collection Reports	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Census Reports	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Certification of FTE for School Site Employees Performance Bonus and Certification Staff Performance Incentive Act Awards	3 Years	4 Years	Timing/Fiscal Year	--	--
J-67	1	Certification of Total Income, Attendance and Transportation for Development Centers for Handicapped Pupils	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19CH/E)	1	Charter School Educationally Disadvantaged Pupil Data	Permanent	Permanent		4 Years	Permanent
J-4	1	Claim for Reimbursement for County School Service Fund	Permanent	Permanent		4 Years	Permanent
A-1, A-3, VE-5	1	Claim for Reimbursement of Federal Vocational Education Funds	Permanent	Permanent		4 Years	Permanent
J-51	1	Classes for Adults Cost Data Report	Permanent	Permanent		4 Years	Permanent
VEA-30	2	Combined Application for VEA Funds, TitleIIA, TitleIIB, Title III B; including Vocational Education Projected Program Inventory System	5 Years	6 Years	(A)	--	--
	1	Commercial Warrant Register	Permanent	Permanent		4 Years	Permanent
J-66	1	Cost Data Report for the Development Center for Handicapped Pupils Programs	Permanent	Permanent		4 Years	Permanent
	2	County AFDC Report	4 Years	4 Years	--	--	
J-73	1	County School Service Fund Financial Report Budget Preliminary Budget	Permanent	Permanent		4 Years	Permanent
		1. II. Final III.					

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

(A) - Final Audit - ref: Voc Ed Financial Report and Claim for Funds

Accounting & Budget Records... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-73-5	1	County School Service Fund Budget-Supplemental Schedule	Permanent	Permanent		4 Years	Permanent
J-73-C	1	County School Service Fund Financial Report Supplement Cost Data Report	Permanent	Permanent		4 Years	Permanent
J-73-P	1	County School Service Fund - Position Schedule	Permanent	Permanent		4 Years	Permanent
J-73-J	1	County School Service Fund - Project Expenditure Detail	Permanent	Permanent		4 Years	Permanent
J-73-A	1	County School Service Fund Supplemental Annual Financial Report	Permanent	Permanent		4 Years	Permanent
St Software (J-27/28-A) (J-27-A) (J-28-A)	1	County Superintendent's Report of Schools and Classes Maintained: Annual Report of Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-27/28-P1) (J-27-P1) (J-28-P1)	1	County Superintendents Report of Schools and Classes Maintained: First Period Report of Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-27-P2) (County)	1	County Superintendents Report of Schools and Classes Maintained on a County-wide Basis: Second Period Report for Elementary Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-27/28-P2) (J-27-P2) (J-28-P2)	1	County Superintendents Report of Schools and Classes Maintained: Second Period Report of Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
J-20	1	County Superintendents Report of Small Schools	Permanent	Permanent		4 Years	Permanent
St Software (J-27/28)	1	Days of Attendance and ADA (Report by Elementary and Secondary)	Permanent	Permanent		4 Years	Permanent
J-22.2-A	1	Driver Training Cost Data Report	Permanent	Permanent		4 Years	Permanent
R-2	1	Employee Ratio Summary Certification Document	Permanent	Permanent		4 Years	Permanent
	(a)	Encumbrance Detail Listing	(a)	1 Year	Fiscal Accountability	--	--
J-73.4	1	Expenditure of ECIA Funds	Permanent	Permanent		4 Years	Permanent
CD-2710	2	Expenditure Report for Start-up/Close-down Costs for F.Y.	4 Years	5 Years	Final Audit	--	--
CD-9725	3	Expenditures Worksheet	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-2600	3	Family Fee Schedule	3 Years	4 Years	Timing/Fiscal Year	--	--
SACS (J-200)	1	Final Annual Financial and Budget Report	Permanent	Permanent		4 Years	Permanent
794-017	1	Final Expenditure and Performance Report for P.L.94-142	Permanent	Permanent		4 Years	Permanent
	1	Final Financial Report. Demonstration Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-19-A)Aden	1	Final Report of Adult Education ADA	Permanent	Permanent		4 Years	Permanent
2VEA-,3VEA-3, 4VEA-3, SAVEA-3, VEA-4 & 5	2	Financial Report and Claim for Funds	5 Years	6 Years	(A)	-	-
	1	Financial Statements - All Funds	Permanent	Permanent		4 Years	Permanent
SACS (J-251)	1	First Interim Financial Report	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P1)	1	First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P1)	1	First Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

Accounting & Budget Records... continued

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			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-50-P1	1	First Period Report for Special Ed. Master Plan	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P1)	1	First Period Report for Special Programs	Permanent	Permanent		4 Years	Permanent
St Software (J18/19C-P1) (J-19-P1 Suppl)County	1	First Period Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-19-P1)	1	First Period Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19CH) P-1 ADA	1	First Period Report of Charter School Funded Through Revenue Limits (E.C.42238)	Permanent	Permanent		4 Years	Permanent
C-1- P1	1	First Period Report for Cal-SAFE Child Care Funding	Permanent	Permanent		4 Years	Permanent
B-P1	1	First Period Report of Attendance for Students Enrolled in District Cal-SAFE Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19/P1) (J-19-P1) Supplement	1	First Period Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-19E-P1)	1	First Period Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-18-P1)	1	First Period Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-18-P1) Supplement	1	First Period Report of Attendance for Kindergarten and Elementary Pupils Residing in the District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-18-P1)	1	First Period Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) Supplement	1	First Period Report of Attendance for Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J18/19C-P1) (J-18-P1) Suppl County	1	First Period Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
CD-9500	2	Fiscal Report for Child Development Program	4 Years	5 Years	Final Audit	--	--
CD-2507	1	Fiscal Report for Resource and Referral Programs	Permanent	Permanent		4 Years	Permanent
CD-8501	2	Fiscal Report for State Preschool Program Audit	4 Years	5 Years	Final State/Federal	--	--
K-12-A	3	Form and Schedule for the Computation of the Annual Principal Apportionment	3 Years	4 Years	Timing/Fiscal Year	--	--
K-12-P1	3	Form and Schedule for the Computation of the First Principal Apportionment	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Form and Schedule for the Computation of the First Principal Revenue Limit for School Districts	3 Years	4 Years	Timing/Fiscal Year	--	--
K-12-P2	3	Form and Schedule for the Computation of the Second Principal Apportionment	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Form for the Computation of the First Principal Revenue Limit for the County School Service Fund	3 Years	4 Years	Timing/Fiscal Year	-	-
	3	Fuel Tax - Claim for Refund	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	General Ledger	Permanent	Permanent		4 Years	Permanent
	3	Impact of Salary Settlement on the School District Budget	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

(A) - Final Audit - ref: Voc Ed Financial Report and Claim for Funds

Accounting & Budget Records... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-12	1	Instructional Television Program Cost Data Report	Permanent	Permanent		4 Years	Permanent
SACS (J-251)	1	Interim Financial Reports	Permanent	Permanent		4 Years	Permanent
	3	Investment Records	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Invoices, District - Outgoing	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Invoices, Vendor's	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Journals -All Funds	3 Years	4 Years	Fiscal Accountability	--	--
	3	Journal Vouchers	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Ledgers -All Funds	3 Years	Permanent	Fiscal Accountability	--	
	1	Mentor Teacher Financial Report	Permanent	Permanent		4 Years	Permanent
J-9 MH-A	1	Morgan-Hart Program to Reduce Class Size in Grade 9 Report of Enrollment	Permanent	Permanent		4 Years	Permanent
SACS (J-380/580)	1	National Public Education Financial Matrix Survey	Permanent	Permanent		4 Years	Permanent
J-31	1	Notification of Intent to Direct Order Instructional Materials Using State Instructional Materials Allowance	Permanent	Permanent		4 Years	Permanent
J-30	1	Notification of Intent to Utilize the State Credit System Instructional Materials Fund	Permanent	Permanent		4 Years	Permanent
	3	Petty Cash Payments Memo	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Preliminary Revenue Limit	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-2921	3	Preschool Incentive Grant Application	3 Years	4 Years	Timing/Fiscal Year	--	--
SACS-PCR (J-380)	1	Program Cost Report	Permanent	Permanent		4 Years	Permanent
SACS-PCRAF (J-380)	1	Program Cost Report - Allocation Factors	Permanent	Permanent		4 Years	Permanent
	2	Prior Year Conversion K-8 IMF Direct Order Districts	4 Years	5 Years	Final Audit	--	--
SACS (J-380)	1	Prior Year Expenditures by Object Matrix Within Program for General Fund	Permanent	Permanent		4 Years	Permanent
	1	Program Application and Financial Report (Mentor Teacher)	Permanent	Permanent		4 Years	Permanent
A-127-D	1	Program Financial Report (Staff Development Projects)	Permanent	Permanent		4 Years	Permanent
	3	Purchase Orders - Board Copy	3 Years	4 Years	Fiscal Accountability	--	--
	3	Receipts - District Collections	3 Years	4 Years	Timing/Fiscal Year	--	--
J-73.1	1	Report of Accounts Receivable	Permanent	Permanent		4 Years	Permanent
J-152	1	Report of Attendance and Cost of Educating Adults in County Correctional Facilities	Permanent	Permanent		4 Years	Permanent
J-65	1	Report of Attendance for Development Centers for the Handicapped	Permanent	Permanent		4 Years	Permanent
J-73.2	1	Report of Current Liabilities	Permanent	Permanent		4 Years	Permanent
J-22.2C	1	Report of Driver Training Vehicles or Simulators	Permanent	Permanent		4 Years	Permanent
J-111-A	1	Report of Individual Class Sessions as Required by Education Code Section 41374	Permanent	Permanent		4 Years	Permanent
	2	Report of Interest Earned on Instructional Materials (Direct Order Districts)	4 Years	5 Years	Final Audit	--	--
J-29.1	1	Report of "Miscellaneous" Funds	Permanent	Permanent		4 Years	Permanent
J-35	1	Report of Necessary Small High Schools	Permanent	Permanent		4 Years	Permanent
J-20-P1	1	Report of Necessary Small Schools	Permanent	Permanent		4 Years	Permanent
J-20-P2	1	Report of Necessary Small Schools	Permanent	Permanent		4 Years	Permanent
St Software (J-7)	1	Report of Regular Day Classes and Enrollment for Kindergarten and Elementary Grades	Permanent	Permanent		4 Years	Permanent
J-22.26	1	Report of Replaced Driver Training Vehicles or Simulators Used Exclusively for Driver Training	Permanent	Permanent		4 Years	Permanent

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Accounting & Budget Records... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
SACS-TRAN (J-142)	1	Report of Replaced School Buses	Permanent	Permanent		4 Years	Permanent
P-15	1	Report of Royalties Received for Copyrighted Work Developed with a State-Administered Federal Grant	Permanent	Permanent		4 Years	Permanent
SACS-TRAN (J-143)	1	Report of School Buses Purchased	Permanent	Permanent		4 Years	Permanent
J-18.1	1	Report of Small Elementary Schools	Permanent	Permanent		4 Years	Permanent
J-29-B	1	Report of the Amount of Taxes Annual Collected and Distributed for the Fiscal Year for School Districts	Permanent	Permanent		4 Years	Permanent
J-29-C	1	Report of the Amount of Taxes Annual Collected and Distributed to the County Superintendent of Schools	Permanent	Permanent		4 Years	Permanent
J-29-C	1	Report of the Estimated Amount of Taxes to be Collected for County Offices of Education	Permanent	Permanent		4 Years	Permanent
J-29-B	1	Report of the Estimated Amount of Taxes to be Collected for School Districts	Permanent	Permanent		4 Years	Permanent
J-13/ CD- 2707	1	Request for Allowance on Attendance because of Emergency Conditions	Permanent	Permanent		4 Years	Permanent
CD-2703/ CD-7801	2	Request for Approval of Instructional Equipment Expenditures	4 Years	5 Years	Final Audit	--	
	2	Request for Fast Growth Allowance Instructional Materials	4 Years	5 Years	Final Audit	--	
J-73-R	1	Request for Revision of County School Service Fund	Permanent	Permanent		4 Years	Permanent
CD-6506	2	Request for Revision of State Preschool Program Budget	4 Years	5 Years	Final State/Federal Audit	--	
	(a)	Requisitions	(a)	1 Year	Fiscal Accountability	--	--
J-90-F	1	Salary Data by Employee Classification	Permanent	Permanent		4 Years	Permanent
AIE-1	1	SB 2264 Final Expenditure Report	Permanent	Permanent		4 Years	Permanent
CD-6507	1	School Age Parenting and Infant Development Program Report of Attendance, Income and Expenditures	Permanent	Permanent		4 Years	Permanent
J-73-T	1	Second Period Attendance Reporting - Special Education	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2)	1	Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2)	1	Second Period Report for Handicapped Pupils Attending and ROC/P	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2)	1	Second Period Report for Special Programs	Permanent	Permanent		4 Years	Permanent
J-18/19-C-P2 (J-19-P2) Supplement (County)	1	Second Period Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-19-P2)	1	Second Period Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-19-P2) Supplement	1	Second Period Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-19E-P2)	1	Second Period Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent
SS-001	1	Summer School Report/Survey	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Accounting & Budget Records... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
St Software (J-18/19-P2) (J-18-P2)	1	Second Period Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-18-P2) Supplement	1	Second Period Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2)	1	Second Period Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) Supplement	1	Second Period Report of Attendance for Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-C-P2) (J-18-P2) Suppl (County)	1	Second Period Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
C-1- P2	1	Second Period Report for Cal-SAFE Child Care Funding	Permanent	Permanent		0 ears	Permanent
B - P2	1	Second Period Report of Attendance for Students Enrolled in District Cal-SAFE Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19CH) P2 ADA	1	Second Period Report of Charter School Funded Through Revenue Limits (E.C.42238)	Permanent	Permanent		4 Years	Permanent
	1	Second Period Report of School Attendance Days	Permanent	Permanent		4 Years	Permanent
J-50-P2	1	Second Period Report of Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-50	1	Second Principal Apportionment Series Special Education, Forms for School Districts, County Offices of Education, and Special Education Local Plan Areas	Permanent	Permanent		4 Years	Permanent
	3	Second Principal Revenue Limit Data Sheets and Schedules for School Districts	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Second Principal Revenue Limit Form and Schedules for the County School Service Fund	3 Years	4 Years	Timing/Fiscal Year	--	--
J-50	1	Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
BT-401-A	3	State, Local Sales and Use Tax Return	3 Years	4 Years	Timing/Fiscal Year	--	--
1099	1	Statement for Recipients of Miscellaneous Income	Permanent	Permanent		4 Years	Permanent
J-32	3	State School Register	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Stores Inventory Detail	3 Years	4 Years	Timing/Fiscal Year	--	--
	2	Supplemental Combined Application for Vocational Education Funds, Subparts 2,3,4,5	5 Years	6 Years	(A)	--	--
J-380 (J-41 A)	1	Supplemental Annual Financial Report	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A) Supplement	1	Supplement to Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P1) Supplement	1	Supplement to First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2) Supplement	1	Supplement to Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
SACS (J-200)	1	Tentative Annual Financial and Budget Report	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

(A) - Final Audit - ref: Voc Ed Financial Report and Claim for Funds

(A) - Final Audit - ref: Voc Ed Financial Report and Claim for Funds

Accounting & Budget Records... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
	3	Textbook Ordering Information: Submissions of Orders/Invoices Charged Against Instructional Materials Fund	3 Years	4 Years	Timing/Fiscal Year	--	--
SACS-TRAN (J-141-T)	1	Transfer of Transportation Services	Permanent	Permanent		4 Years	Permanent
	2	Transmittal of Quarterly Reports with Qualified or Negative Certifications (State Controller's Office)	4 Years	5 Years	Final Audit	--	--
BT-401-U	3	User Use Fuel Tax Report	3 Years	4 Years	Timing/Fiscal Year	--	--
BT-401 -V	3	Vendor Use Fuel Tax Return	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Warrant Cancellation Request to County	3 Years	4 Years	Timing/Fiscal Year	--	--
SACS-TRAN (J-141CW-2)	1	Worksheet for a Cooperative Pupil Transportation System	Permanent	Permanent	Only Report Filed	4 Years	Permanent
J-51-W	3	Worksheet for Classes for Adults Cost Data Report	3 Years	4 Years	Timing/Fiscal Year	--	--
SACS-TRAN (J-141-DEP)	3	Worksheet for Compiling Data for Computing Depreciation on District-Owned School Buses Used for Transportation Out-of-State or Community Recreation	3 Years	4 Years	Timing/Fiscal Year	--	--
SACS-TRAN (J-141CW-1)	3	Worksheet for Cost Data for a Cooperative Pupil Transportation System	3 Years	Permanent	Report is Class 1 (7 Yr. Statute of Limitations)	--	--
SACS-TRAN (J-141-W)	3	Worksheet for Cost Data Report for a Single District Pupil Transportation System	3 Year	Permanent	Report is Class 1 (7 Yr. Statute of Limitations)	--	--
J-73-CW	3	Worksheet for County School Service Fund Financial Report Supplemental Cost Data Report	3 Years	4 Years	Timing/Fiscal Year	--	--
J-22.2A-W	3	Worksheet for Driver Training Cost Data Report	3 Years	4 Years	Timing/Fiscal Year	--	--
J-66-W	3	Worksheet for the Cost Data Report for the Development Center for Handicapped Pupils Program	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

(A) - Final Audit - ref: Voc Ed Financial Report and Claim for Funds

(A) - Final Audit - ref: Voc Ed Financial Report and Claim for Funds

Administration/Board Minutes & Correspondence

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
	1	Boundary Change Documents	Permanent	Permanent		4 Years	Permanent
	1	Budgets	Permanent	Permanent		4 Years	Permanent
	1	California Assessment Program: Grades Two, Three and Six	Permanent	Permanent		4 Years	Permanent
CD-7504/ CD-2215	2	Certification of Compliance with Child Care Maintenance of Effort	4 Years	5 Years	Final Audit	--	--
	1	Controller's Reports	Permanent	Permanent		4 Years	Permanent
J-4-A	1	Cooperative County Publication Projects Approval of Meetings and Attendees	Permanent	Permanent		4 Years	Permanent
P-11	1	Copyright Authorization Agreement (Publisher Already Selected)	Permanent	Permanent	In Case of Dispute	4 Years	Permanent
P-12	1	Copyright Authorization Agreement (Publisher Not Yet Selected)	Permanent	Permanent	In Case of Dispute	4 Years	Permanent
P-10	2	Copyright Authorization Request Form	4 Years	4 Years	--	--	--
	3	Correspondence	3 Years	4 Years	Timing/Fiscal Year	--	--
R-5	1	County Report of School Bond, Loan, and Revenue Limit Election	Permanent	Permanent		4 Years	Permanent
	1	District Request for Authorization to Maintain School or Contract for the Education of Pupils Outside the District	Permanent	Permanent		4 Years	Permanent
	1	Election Calls	Permanent	Permanent		4 Years	Permanent
	(a)	Election Detail Documents (e.g. Ballots)	(a)	1 Year	As Long as Needed in Case of Dispute	--	--
	1	Election Returns and Reports	Permanent	Permanent		4 Years	Permanent
	1	Minutes - Board	Permanent	Permanent		4 Years	Permanent
	1	Minutes of Committees	Permanent	Permanent		4 Years	Permanent
	3	Notes, Transcripts, and Recordings Used in Taking Minutes	3 Years	4 Years	Keep Longer if Needed in Connection with Litigation	--	--
	2	Notification of Intent to Hold Elementary and High School Summer School Sessions	4 Years	5 Years	Final Audit	--	--
	2	Report of Copyright Work Developed with a State-Administered Federal Grant	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Report of Royalties Received for Copyrighted Work Developed with a State-Administered Federal Grant	4 Years	5 Years	Final State/ Federal Audit	--	--
	1	Request to Use Instructional Materials Fund Credit to Purchase Materials Not Adopted by the State Board of Education	Permanent	Permanent		4 Years	Permanent
	1	Results of Bond/Tax Elections	Permanent	Permanent		4 Years	Permanent
	1	Rules, Regulations, Policies Resolutions Referenced in Minutes	Permanent	Permanent		4 Years	Permanent
	2	Senate Bill 1882 Applications	4 Years	5 Years	Final Audit	--	--
DSCR-89	3	Standard School Crime Reporting Program, District Summary	3 Years	Permanent	Possible Litigation	--	--
DSCR-89	3	Statement of Economic Interest Program, District Summary	7 Years	7Years	Keep Until End of Term of Office	--	--
NCES-2407	1	1980 Census Data by School District	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion
(a) - No Legal Requirements

CBEDS (California Basic Education Data Systems)

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
		CBEDS Forms/Reports County/District Information			Maintain for Reference		
	(a)	Forms School Information Forms All Standard CBEDS Output Reports	(a)	4 Years	Purposes for Fiscal Accountability	--	--

Class 1 -Permanent Records
(a) - No Legal Requirements

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Certification Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-14.1	1	Affidavit of the Proper Certification for Work Performed by Certificated Employees	Permanent	Permanent		4 Years	Permanent
J-9-A	1	Annual Certification of the Application for Specialist Teachers in Reading	Permanent	Permanent		4 Years	Permanent
J-10	1	Certification of the Application for Allowance for Specialist Teachers in Reading	Permanent	Permanent		4 Years	Permanent
	(a)	Credential Application Record Card	(a)	1 Year	Hold Until Credential is Received	--	--
	1	Individual Referral Certification for Training	Permanent	Permanent		4 Years	Permanent
	1	Licenses	Permanent	Permanent		4 Years	Permanent
	1	Notice of Employment	Permanent	Permanent		4 Years	Permanent
	1	Personnel Action Forms	Permanent	Permanent		4 Years	Permanent
	1	Personnel Records: Employment and Assignment Records	Permanent	Permanent		4 Years	Permanent
	1	Personnel Records/Information	Permanent	Permanent		4 Years	Permanent
J-10-B	3	Preliminary Certification for the Application for Allowance for Specialist Teachers in Reading	3 Years	4 Years		Timing/Fiscal 1 Year	--
	1	Teaching Certificates	Permanent	Permanent		4 Years	Permanent
	1	Teaching Credentials	Permanent	Permanent		4 Years	Permanent
	1	Teaching Permits	Permanent	Permanent		4 Years	Permanent
	(a)	Temporary County Credential	(a)	1 Year	Hold Until Credential is Received	--	--
	1	Validation of Service Without Proper Credential	Permanent	Permanent		4 Years	Permanent
SBEW-2	3	Waiver Request	3 Years	3 Years	Waiver Effective Two Years after State Board acts on it	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

(a) - No Legal Requirements

Child Development - Child Care

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CD-2600-A	2	Admission Priorities	4 Years	5 Years	Final Audit	-	--
CD-8208-A	1	Alternative Child Care Program Employee Record Clearance	Permanent	Permanent		4 Years	Permanent
J-200/300 (J-41)	1	Annual Financial and Budget Report	Permanent	Permanent		4 Years	Permanent
CD-1703	2	Application for Capital Outlay Funds for Family Child Care Homes	4 Years	5 Years	Final Audit	--	--
CD-2209	1	Application for Child Development License	Permanent	Permanent		4 Years	Permanent
CD-9600	2	Application for Child Development Services and Certification of Eligibility	4 Years	5 Years	Final Audit	--	--
CD-9602	2	Application for Child Development Services - Migrant and Federal Base (English and Spanish)	4 Years	5 Years	Final State/Federal Audit	--	--
CD-2712	2	Application for Enrollment in State Preschool Program Audit	4 Years	5 Years	Final State/Federal	--	--
	2	Application for Funding	4 Years	5 Years	Final Audit	--	--
CD-9725 CD-3704	2	Application for Funds to Provide Child Care and Development Services	4 Years	5 Years	Final Audit	--	--
CD-1707	2	Application for Relocatable Child Care and Development Facility	4 Years	5 Years	Final Audit	--	--
CD-1706	2	Application for Revolving Loan Fund	4 Years	5 Years	Final Audit	--	--
CD-9502	1	Attendance and Fiscal Report for Alternative Payment and Child Protective Service Program	Permanent	Permanent		4 Years	Permanent
CD-9501	1	Attendance and Fiscal Report for Child Care and Development Program	Permanent	Permanent		4 Years	Permanent
CD-9500	1	Attendance and Fiscal Report for Child Development Programs	Permanent	Permanent		4 Years	Permanent
CD-9501	1	Attendance and Fiscal Report for County Welfare Departments	Permanent	Permanent		4 Years	Permanent
CD-9516	1	Attendance and Fiscal Report for School-age Community Child Care Services	Permanent	Permanent		4 Years	Permanent
CD-9517	1	Attendance and Fiscal Report for School-age Community Child Development Programs Alternative Payment	Permanent	Permanent		4 Years	Permanent
CD-6507	1	Attendance and Fiscal Report for School-age Parenting in Infant Development Program	Permanent	Permanent		4 Years	Permanent
CD-1400	1	Attendance and Fiscal Report for Special Programs for the Severely Handicapped	Permanent	Permanent		4 Years	Permanent
CD-8501	1	Attendance and Fiscal Report for State Preschool Programs	Permanent	Permanent		4 Years	Permanent
CD-2504	1	Attendance and Services Data Report for Resource and Referral Program	Permanent	Permanent		4 Years	Permanent
	1	Audits for Child Development Programs Administered by Private Non-Profit and Public Agencies	Permanent	Permanent		4 Years	Permanent
CD-9725 CD-2405	3	Budget Worksheet	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-9725	3	Calendar	3 Years	4 Years	Timing/Fiscal Year	-	--
CD-9212	2	Center Compliance Review Personal Certification	4 Years	5 Years	Final Audit	--	--
CD-7504/ CD-2215	2	Certificate of Compliance with Child Care Maintenance of Effort	4 Years	5 Years	Final Audit	--	--
CD-3704	2	Certification of Application Information	4 Years	5 Years	Final Audit	--	--
CD-3701 (CD-9725)	3	Certified Personnel Roster	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-7701	2	Child Care and Development Program Waiver Request	4 Years	5 Years	Final Audit	--	--
CD-7701 CD-3700	2	Child Development Waiver Requests	4 Years	5 Years	Final Audit	--	--

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

- - Feasibility to Microfilm at District Discretion

Child Development - Child Care ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CD-2406 CD-3705 (CD-9725)	2	Child Ratio Schedule	4 Years	5 Years	Final Audit	--	--
CD-9730	1	Days of Operation	Permanent	Permanent		4 Years	Permanent
CD-7414	2	Declaration of In-Kind Contributions for Campus Children's Centers	4 Years	5 Years	Final Audit	--	--
CD-9607	2	Emergency and Identification Information Cards (English and Spanish)	4 Years	5 Years	Final Audit	--	--
CD-9400	1	Enrollment and Attendance Register for Child Care and Development	Permanent	Permanent		4 Years	Permanent
CD-8200	1	Enrollment and Attendance Register for State Preschool Program	Permanent	Permanent		4 Years	Permanent
CD-2710	2	Expenditure Report for Start-up/Close-down Costs for F.Y.	4 Years	5 Years	Final Audit	--	
CD-9725	3	Expenditures Worksheet	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-9212 CD-3705	2	Facility Compliance Review - Personnel	4 Years	5 Years	Final Audit	--	--
CD-2600	3	Family Fee Schedule	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-9500	2	Fiscal Report for Child Development Programs	4 Years	5 Years	Final Audit	--	--
CD-2507	1	Fiscal Report for Resource and Referral Programs	Permanent	Permanent		4 Years	Permanent
CD-8501	2	Fiscal Report for State Preschool Program Audit	4 Years	5 Years	Final State/Federal	--	--
CD-2205	3	Injury Report	3 Years	Permanent	Possible Litigation	--	--
CD-9603	3	Instructions for CD-9602 (Application for Child Development Services - Migrant and Federal)	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-8403	2	Intent/Request to Provide or Expand Child Care and Development Services	4 Years	5 Years	Final Audit	--	
CD-8604	2	Inventory Register	4 Years	5 Years	Final Audit	--	--
CD-3702	3	Latchkey - Personnel Certification	3 Years	Permanent	Possible Litigation	--	--
CD-3700	3	Latchkey - Request for a Waiver of the State Participation Limit	3 Years	Permanent	Possible Litigation	--	--
CD-9500-A	1	Migrant Specialized Services - Attendance and Fiscal Report for Child Development Programs	Permanent	Permanent		4 Years	Permanent
CD-2210, 2211	2	Monthly Certification of Contract Compliances Child Development Services	4 Years	5 Years	Final Audit	--	--
CD-8806	3	Order Form	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-2206	1	Parents Report - Child's Preadmission Health History	Permanent	Permanent		4 Years	Permanent
CD-2207	1	Physician's Report -Child's Preadmission Health History	Permanent	Permanent		4 Years	Permanent
CD-2921 (CD-9710)	2	Preschool Incentive Grant Application	4 Years	5 Years	Final Audit	--	--
CD-1108	2	Proposal for One-Time Only Funds for Children with Special Needs	4 Years	5 Years	Final Audit	--	--
CD-1100	3	Rate Increase Request/Application	3 Years	4 Years	Fiscal Accountability	--	--
CD-9520	2	Report of Enrollment	4 Years	5 Years	Final Audit	--	--
CAL SAFE Form B	2	Report of Attendance for students enrolled in District Cal Safe Program	3 Years	4 Years	Final Audit		
CAL SAFE Form C-1	2	Report of Child Care Funding, School District and County Office of Education	3 Years	4 Years	Final Audit		
CD-2707/ J-13	1	Request for Allowance of Attendance Because of Emergency Conditions	Permanent	Permanent		4 Years	Permanent
CD-2703 (CD-7801)	3	Request for Approval of Equipment	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Request for Approval of Facility Renovation	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-2703/ CD-7801	2	Request for Approval of Instructional Equipment Expenditures	4 Years	5 Years	Final Audit	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

Child Development - Child Care ... continued

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
CD-2700	3	Request for Approval of Out-of-State Travel	3 Years	4 Years	Fiscal Accountability	--	--
CD-6506	2	Request for Revision of State Preschool Program Budget Audit	4 Years	5 Years	Final State/Federal	--	--
CD-6507	2	Attendance and Fiscal Report for School Age Parenting and Infant Development Program	4 Years	5 Years	Final Audit	--	--
CD-2504	3	Service Data Report for Resource and Referral Program	3 Years	4 Years	Fiscal Accountability	--	--
CD-9725	3	Staffing Worksheet	3 Years	4 Years	Fiscal Accountability	--	--
CD-9606	3	Statement of Incapacity (English and Spanish)	3 Years	4 Years	Possible Litigation	--	--
CD-9605	3	Training Verification (English and Spanish)	3 Years	Permanent	Possible Litigation	--	--
CD-1002A	3	Worksheet for rating the Program Quality Rev. (PQR) - Center Based Preschool Age Program	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-1002D	3	Worksheet for rating the PQR - Family Child Care	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-1002B	3	Worksheet for rating the PQR - Infant Toddler	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-1002E	3	Worksheet for rating the PQR - School Age Child Care Program	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-1002C	3	Worksheet for rating the PQR - School Age Parenting and Infant Development (SAPID)	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Child Welfare and Attendance

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
	1	Affidavit for Change of Name of Minor	Permanent	Permanent	With "Cum" File	4 Years	Permanent
	1	Affidavit for Proof of Age of Minor	Permanent	Permanent	With "Cum" File	4 Years	Permanent
	1	Amnesty Education Audit Report	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-22-A	1	Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-22-A	1	Annual Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-C-A (J-19-A) Supplement (County)	1	Annual Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-A (1-19-A)	1	Annual Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-A (J-19-A) Supplement	1	Annual Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-A (J-19E-A).	1	Annual Report of Attendance for Jr. High School Grades 7 and 8 only	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-A (J-18-A)	1	Annual Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-A (J-18-A) Supplement	1	Annual Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-22-A	1	Annual Report of Attendance for Special Programs	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-A	1	Annual Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE Annual, J-18/19-A Supplement	1	Annual Report of Attendance for Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
J-18/19-C-A (J-19-A) Supplement (County)	1	Annual Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent
CD-9502	1	Attendance and Fiscal Report for Alternative Payment and Child Protective Service Program	Permanent	Permanent		4 Years	Permanent
CD-9501	1	Attendance and Fiscal Report for Child Care and	Permanent	Permanent		4 Years	Permanent
CD-9500	1	Attendance and Fiscal Report for Child Development Program	Permanent	Permanent		4Year	Permanent
CD-9501	1	Attendance and Fiscal Report for County Welfare Departments	Permanent	Permanent		4 Years	Permanent
CD-9516	1	Attendance and Fiscal Report for School-age Community Child Care Program	Permanent	Permanent		4 Years	Permanent
CD-9507	1	Attendance and Fiscal Report for School-age Community Child Development Programs Alternative Payment	Permanent	Permanent		4 Years	Permanent
CD-6507	1	Attendance and Fiscal Report for School-age Parenting and Infant Development Program	Permanent	Permanent		4 Years	Permanent
CD-1400	1	Attendance and Fiscal Report for Special Programs for the Severely Handicapped	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

- - Feasibility to Microfilm at District Discretion

Child Welfare and Attendance ...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CD-8501	1	Attendance and Fiscal Reports for State Preschool Program	Permanent	Permanent		4 Years	Permanent
CD-2504	1	Attendance and Service Data Report for Resource and Referral Program	Permanent	Permanent		4 Years	Permanent
	(a)	CBEDS Forms/Reports • County/District Information Form • School Information Form • All Standard CBEDS Output Reports	(a)	1 Year	Maintain for Reference Purposes for Fiscal Accountability	--	--
J-67	1	Certification of Total Income, Attendance and Transportation for Development Centers for Handicapped Pupils	Permanent	Permanent		4 Years	Permanent
J-27/28-A (J-27-A) (J-28-A)	1	County Superintendent's Report of Schools and Classes Maintained: Annual Report for Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
CDE P1, J-27/28-P1 (J-27-P1) (J-28-P1)	1	County Superintendent's Report of Schools and Classes Maintained: First Period Report for Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
CDE P2, J-27- P2 (County)	1	County Superintendent's Report of Schools and Classes Maintained on a County-wide Basis: Second Period Report for Elementary School Attendance	Permanent	Permanent		4 Years	Permanent
CDE P2, J-27/28-P2 (J-27-P2) (J-28-P2)	1	County Superintendent's Report of Schools and Classes Maintained: Second Period Report for Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
CDE P1, J- 27/28	1	Days of Attendance and ADA (Report by Elementary and Secondary)	Permanent	Permanent		4 Years	Permanent
	(a)	Declaration of Residency and Responsibility	(a)	1 Year	Internal Working Papers	--	--
CD-9400	1	Enrollment and Attendance Register for Child Care and Development	Permanent	Permanent		4 Years	Permanent
CD-8200	1	Enrollment and Attendance Register for State Preschool Program	Permanent	Permanent		4 Years	Permanent
	3	Exemption from Compulsory Public School Attendance	3 Years	4 Years	Fiscal Accountability	--	--
J-18/19-A (1-19-A) Addendum	1	Final Report of Adult Education ADA	Permanent	Permanent		4 Years	Permanent
CDE P1, J-22- P1	1	First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
CDE P1, J-22- P1	1	First Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
CDE P1, J-22- P1	1	First Period Report for Special Programs	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-C-P1 (J-19-P1) Supplement (County)	1	First Period Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-P1 (J-19-P1)	1	First Period Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-P1 (J-19-P1) Supplement	1	First Period Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged.	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-P1 (J-19E-P1)	1	First Period Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Child Welfare and Attendance ...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CDE P1, J-18/19-P1 (J-18-P1)	1	First Period Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-P1 (J-18-P1) Supplement	1	First Period Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-P1	1	First Period Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-P1 Supplement	1	First Period Report of Attendance for Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
CDE P1, J-18/19-C-P7 (J-18-P1) Supplement (County)	1	First Period Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
	3	Input for Computer/Attendance Information	3 Years	4 Years	Fiscal Accountability	--	--
CD-9500-A	1	Migrant Specialized Services - Attendance and Fiscal Report for Child Development Program	Permanent	Permanent		4 Years	Permanent
	(a)	Mistreatment of Minor Report	(a)	1 Year	Information	--	--
	3	Notes from Parents (Including Absence Notices)	3 Years	4 Years	Fiscal Accountability	--	--
	3	Notice of Student Suspension	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Notice to Parent from SARB	Permanent	Permanent	With "Cum" File	4 Years	Permanent
	3	Notification to Parent Regarding Ed. Code 48200- Absence from School	3 Years	4 Years	Timing/Fiscal year	--	--
	(a)	Notification to Remove Pupil from School Premises During School Hours by Peace Officer	(a)	1 Year	Legal Purposes	--	--
B1-4	(a)	Permit to Employ and Work	(a)	(a)	Most Current	--	--
J-65	1	Report of Attendance for Development Centers for the Handicapped	Permanent	Permanent		4 Years	Permanent
J-35	1	Report of Necessary Small High School	Permanent	Permanent		4 Years	Permanent
J-20-P1	1	Report of Necessary Small Schools	Permanent	Permanent		4 Years	Permanent
J-20-P2	1	Report of Necessary Small Schools	Permanent	Permanent		4 Years	Permanent
J-7	1	Report of Regular Day Classes and Enrollment of Kindergarten and Elementary Grades	Permanent	Permanent		4 Years	Permanent
J-7CSR	1	Report of Enrollment For Kindergarten and Grades One through Three for School Districts and Charter Schools Participating in the K-3, Class Size Reduction Program	Permanent	Permanent		4 Years	Permanent
J-18.1	1	Report of Small Elementary Schools	Permanent	Permanent		4 Years	Permanent
CD-2707/J-13	1	Request for Allowance of Attendance Because of Emergency Conditions	Permanent	Permanent		4 Years	Permanent
	(a)	Request for Home Calls	(a)	1 Year	Fiscal Accountability	--	--
202-019	3	Request for Letter, Office Conference or Complaint in Cases Involving Violations of Specified Ed. Code Section	3 Years	4 Years	Timing/Fiscal Years	--	--
	1	Request for School Attendance	Permanent	Permanent		4 Years	Permanent
B1-1 CSDE	(a)	Request for Work Permit and Statement of intent to Employ Minor	(a)	(a)	Most Current	--	--
	1	SARB Information Form	Permanent	Permanent		4 Years	Permanent
	1	School ADA Report	Permanent	Permanent		4 Years	Permanent
CD-6507	1	School-age Parenting and Infant Development Program Report of Attendance, Income and Expenditures	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion
(a) - No Legal Requirements

Child Welfare and Attendance ...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CDE P2, J-73-T	1	Second Period Attendance Reporting - Special Education	Permanent	Permanent		4 Years	Permanent
CDE P2, J-22-P2	1	Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
CDE P2, J-22-P2	1	Second Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
CDE P2, J-22-P2	1	Second Period Report for Special Programs	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-C-P2 (J-19-P2) Supplement (County)	1	Second Period Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-P2 Supplement	1	Second Period Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-P2 Supplement	1	Second Period Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-P2 Supplement	1	Second Period Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-P2 (J-18-P2)	1	Second Period Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-P2 (J-18-P2) Supplement	1	Second Period Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-P2	1	Second Period Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-P2 Supplement	1	Second Period Report of Attendance for Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
CDE P2, J-18/19-C-P2 (J-18-P2) Supplement (County)	1	Second Period Report of Elementary Attendance for County Superintendent of Schools for Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
J-32	3	State School Register	3 Years	4 Years	riming/Fiscal Year	--	--
	3	Student Misconduct Statement	3 Years	4 Years	Fiscal Accountability	--	--
J-22-A Supplement	1	Supplement to Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
CDE P1, J-22-P1 Supplement	1	Supplement to First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
CDE P2, J-22-P2 Supplement	1	Supplement to Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
	2	Survey of Neglected and Delinquent Children	4 Years	4 Years		--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion
(a) - No Legal Requirements

Continuation Schools

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-301-CE (J-41-CE)	1	Annual Financial Report - Continuation Education School	Permanent	Permanent		4 Years	Permanent
	1	Board Adopted Criteria for Establishment of a Continuation High School	Permanent	Permanent	Board Minutes	4 Years	Permanent
CE-002 CE-001	3	Continuation Education Year-end Report	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

Contracts

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
	2	Bids - Educational and Data Processing, Insurance, Large (Dollar) Equipment Purchases, Security, Crossing Guards, Transportation, and Portable Buildings	5 Years	5 Years	(A)	--	-
	2	Contracts (All)	5 Years	5 Years	(A)	--	--
	3	Insurance Policies and Endorsements (Closed or Terminated)	3 Years	4 Years	Timing/Fiscal Year	--	--
	2	Vendor's Files	5 Years	5 Years	(A)	--	--
Class 1 -Permanent Records		Class 2 -Optional Records	Class 3 -Disposable Records	-- Feasibility to Microfilm at District Discretion			

Curriculum & Instruction

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
	2	Application for Continuation Demonstration Programs in Reading, and Mathematics	4 Years	5 Years	Final Audit	--	
	2	California Assessment Program: Grade 3 - Survey of Basic Skills	4 Years	5 Years	Final Audit	--	--
	2	California Assessment Program: Grade 6 - Survey of Basic Skills	4 Years	5 Years	Final Audit	--	--
	2	California Assessment Program: Grade 8 - Survey of Academic Skills	4 Years	5 Years	Final Audit	--	--
	2	California Learning Assessment System-(Grades 5, 7,10)	4 Years	5 Years	Final Audit	--	--
	2	Classroom Library Materials Act Expenditure Report	4 Years	5 Years	Final Audit	--	--
	1	Demonstration Programs in Reading and Mathematics: Preliminary Fiscal Report	Permanent	Permanent		4 Years	Permanent
	2	Demonstration Programs in Reading and Mathematics: Request for Amendment or Revision	4 Years	5 Years	Final Audit	--	--
	2	Individual Test of Academic Skills (Grades 2 -10)	4 Years	5 Years	Final Audit	--	--
R-30-LC	2	Language Census Report - School Data	4 Years	5 Years	Final Audit	--	--
	2	Mathematics Professional Development Grant (AB1331) Budget Line Item Detail Report	4 Years	5 Years	Final Audit	--	--
	2	Notification of Intent to Hold Elementary and High School Summer School Sessions	4 Years	5 Years	Final Audit	--	--
	2	Proficiency Assessment Report (Grades 6,9,11,12)	4 Years	5 Years	Final Audit	--	--
	2	School Library Act Expenditure Report	4 Years	5 Years	Final Audit	--	--
	3	Special Studies as Needed	3 Years	4 Years	Timing/Fiscal Year	--	--
	2	Staff Development Buy-Back: Application for Funding	4 Years	5 Years	Final Audit	--	--
	3	Survey of Academic Skills: Grade 12	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Textbook Ordering Information: Submission of Orders/Invoices Charged Against Instructional Materials Fund	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Child Nutrition and Food Distribution Division Office of Child Nutrition Services

Policy Memorandum No. 85-306, February 1990

Policy

Effective January 1, 1990, Child Nutrition Program shall be retained for a period of three years after the submission of the fiscal year's final Claim for Reimbursement. In cases where audit findings have not been resolved, records shall be retained beyond the three-year period until the audit issues are resolved. This policy also applies to adult day care food program sponsors.

Background

On July 21, 1989, Assembly Bill 1226 was signed into law as Chapter 194, Statutes of 1989, effective January 1, 1990. This legislation specifies that Child Nutrition Program records shall be retained in accordance with regulations adopted by the United States Department of Agriculture. The enactment of this legislation establishes consistency between state law and federal regulation with regards to the retention of child Nutrition Program records.

Food Services Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
	2	Accounts Payable Records	3 Years	4 Years	Audit Resolution	--	--
		Program Agreement: School Breakfast National School Lunch, Special Milk, State Meal Supplement	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Agreement for Child & Adult Care Food Program, CACFP	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/FNS	2	Program Site Application - CACFP	3 Years	4 Years	Audit Resolution	--	--
CA Dept of ED/FDP	2	Advance Orders for Flour and Direct Shipment to Processor Order Form	3 Years	4 Years	Audit Resolution	--	--
CA Dept of ED/FDP	2	Agreement and Food Offering for Summer Food Serve Programs for Children	3 Years	4 Years	Audit Resolution	--	--
CA Dept of ED/CNFD	2	Agreement for Distribution of Donated Food	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Annual Audit Status Certification	3 Years	4 Years	Audit Resolution	--	--
State Software	1	Annual Financial and Budget Report	Permanent	Permanent		4 Years	Permanent
CA Dept. of ED/NSD	2	Annual Participation Statement: School Breakfast, NSLP, Special Milk, State Meal, Supplement	3 Years	4 Years	Audit Resolution	--	--
CA Dept of ED/FDP	2	Annual Summer and Year-Round Offering - School	3 Years	4 Years	Audit Resolution	--	--
CA Dept of ED/FDP	2	Annual Summer Camp Offering	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Annual Summer Food Service Program for Children - Special Milk Program, State Meal and/or Meal Supplement Programs.	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Application for Funding - Breakfast, Lunch and Special Milk	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/FNS	2	Application for NSLP Breakfast, Milk, State Meal and Meal Supplement Programs	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Application for Seamless Summer Feeding Waiver (SSFW)	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/FNS	1	Audits for US Department of Agriculture	Permanent	Permanent		4 Years	Permanent
	2	Cafeteria Stores Invoices	3 Years	4 Years	Audit Resolution	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

NSD = Nutrition Services Division; FDP = Food Distribution Program; FNS = Food & Nutrition Services (USDA)

Food Services Records ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CA Dept. of ED/FNS	2	Certification of Continuance: Policy Statement for Free and Reduced Price Meals for Free Milk	3 Years	4 Years	Audit Resolution	--	--
	2	Checks and Bank Statements	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Claim for Reimbursement: CACFP, School Lunch and Breakfast, State meal Program, Summer Food Service Programs, Special Milk Program	3 Years	4 Years	Audit Resolution	--	--
	2	Coordinated Review Effort (CRE) Summation Report	3 Years	4 Years	Audit Resolution	--	--
	2	Daily Reports	3 Years	4 Years	Audit Resolution	--	--
	2	Deposit Slips	3 Years	4 Years	Audit Resolution	--	--
	1	Financial Statements	Permanent	Permanent		4 Years	Permanent
	1	Fixed Asset Records	Permanent	Permanent		4 Years	Permanent
CA Dept of ED/FDP	2	Food Offering Form for Warehouse Agencies	3 Years	4 Years	Audit Resolution	--	--
	2	Invoices - Outgoing	3 Years	4 Years	Audit Resolution	--	--
	2	Journal and Ledgers Statement	3 Years	4 Years	Audit Resolution	--	--
	2	Meal Tickets and Registers	3 Years	4 Years	Audit Resolution	--	--
	2	Milk Records	3 Years	4 Years	Audit Resolution	--	--
	2	National School Lunch and Milk Receipts	3 Years	4 Years	Audit Resolution	--	--
	2	Food Inventory	3 Years	4 Years	Audit Resolution	--	--
	2	NSLP Agreement: Production Worksheets (Dailies by Managers and Cooks)	3 Years	4 Years	Audit Resolution	--	--
	2	Payroll Records	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Policy Statement for: Free and Reduced Meals and Free Milk, Free Milk (Special Milk Program for Milk-only Schools, Addendum for Prov. 1,2,&3,	3 Years	4 Years	Audit Resolution	--	--
	2	Receipts from Collections	3 Years	4 Years	Audit Resolution	--	--
CA Dept of ED/FDP	2	Commodity Offering for State Warehouse Agencies	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	Reimbursement Claim: School Lunch, Breakfast and Special Milk Programs	3 Years	4 Years	Audit Resolution	--	--
	2	Requisitions	3 Years	4 Years	Audit Resolution	--	--
	2	Sales Tax Records	3 Years	4 Years	Audit Resolution	--	--
CA Dept. of ED/NSD	2	State Meal Programs: Annual Participation Statement	3 Years	4 Years	Audit Resolution	--	--
	2	Vouchers	3 Years	4 Years	Audit Resolution	--	--
	2	Workers Compensation Files	3 Years	4 Years	Audit Resolution	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

NSD = Nutrition Services Division; FDP = Food Distribution Program; FNS = Food & Nutrition Services (USDA)

Portions of the Food Service Records above were obtained from:

- CASBO, Southern Section, Accounting Research & Development Committee
- CASBO, Southern Section, Child Nutrition Research & Development Committee

NSD = Nutrition Services Division; FDP = Food Distribution Program; FNS = Food & Nutrition Services (USDA)

Garnishments

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
982.5 (1)	(a)	Application for Earnings Withholding Order	2 Years	2 Years	(A)	--	--
982.5 (5)	(a)	Claim of Exemption	2Years	2Years	(A)	--	--
982.5 (2)	(a)	Earnings Withholding Order	2 Years	2 Years	(A)	--	--
USM-296(98)	(b)	Earnings Withholding Order	2Years	2Years	(A)	--	--
982.5 (3)	(a)	Earnings Withholding Order for Support	2 Years	2 Years	(A)	--	--
BT-425-E	(c)	Earnings Withholding Order for Taxes	2Years	2Years	(A)	--	--
FTB2905-M	(d)	Earnings Withholding Order for Taxes	2Years	2Years	(A)	--	--
DE9400	(e)	Earnings With holding Order for Taxes	2Years	2Years	(A)	--	--
982.5 (4)	(a)	Employer's Return	2 Years	2 Years	(A)	-	-
BT-425-M	(c)	Modification of Order to Withhold Tax	2 Years	2 Years	(A)	--	--
982.5 (6)	(a)	Notice of Filing of Claim of Exemption	2 Years	2 Years	(A)	--	--
668-W	(f)	Notice of Levy on Wages, Salary, and Other Income	2 Years	2 Years	(A)	--	--
982.5 (7)	(a)	Notice of Opposition to Claim Exemption	2 Years	2 Years	(A)	--	--
982.5 (10)	(a)	Notice of Termination or Modification of Earnings Withholding Order	2Years	2Years	(A)	--	--
1285.7	(a)	Order Assigning Salary or Wages	2Years	2Years	(A)	--	--
982.5 (9)	(a)	Order Determining Claim of Exemption	2 Years	2 Years	(A)	--	--
B-2020	(g)	Order to Deliver Paychecks to Trustee	2 Years	2 Years	(A)	--	--
668-R	(f)	Release of Levy on Wages, Salary, and Other Income	2 Years	2Years	(A)	--	--
FTB2906-M	(d)	Termination of Order to Withhold Tax	2Years	2 Years	(A)	--	--
1807 (EorN) or 1829 (EorN)	(g)	Voluntary Petition - Chapter 7 Liquidation	2 Years	2 Years	(A)	--	--

(a) -Judicial Council of California

(b) - US Dept of Justice, US Marshals Service

(c) - State of California Board of Equalization

(d) - State of California Franchise Tax Board

(e) - State of California Employment Development Department

(f) - Department of the Treasury - IRS

(g) - United States Bankruptcy Court

(A) - Government Code 26202 (Nothing in Wage Garnishment Law - CCP)

-- Feasibility to Microfilm at District Discretion

Health Services Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
PM-100	3	Annual Report of Hearing Testing	3 Years	4 Years	Timing/Fiscal Year	--	--
PM-272	1	Annual School District and Private School Report of Screening Examinations and Waivers and Invoices: CHDP	Permanent	Permanent		4 Years	Permanent
PM-160	3	Billing/Screening-CHDP	3 Years	4 Years	Timing/Fiscal Year	--	
PM-286	1	California School Immunization Record	Permanent	Permanent		4 Years	Permanent
PM-171	3	Certificate of Physical to Enter First Grade	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Certificate of Waiver to Enter First Grade	3 Years	4 Years	Timing/Fiscal Year	--	--
	(a)	CHDP Appointment and Information	(a)	(a)	Retain until Appointment is made	--	--
	3	Consent for Physical	3 Years	4 Years.	Timing/Fiscal Year	--	--
	(a)	Consent to Administer Medication Administered	(a)	5 Years	Retain as long as	--	--
H519	3	Consent to Immunize	3 Years	4 Years	Timing/Fiscal Year	--	--
	(a)	Consent to Transport	(a)	1 Year	Retain During School Year	--	--
	(a)	Dental Referral/Parent Response	(a)	(a)	Most Current	--	--
	(a)	Doctors and Hospital Records	(a)	(a)	Most Current	--	--
	(a)	Health Information/Parent Questionnaire	(a)	(a)	Most Current	--	--
	1	Health Record Card (Student)	Permanent	Permanent	With "Cum" File	4 Years	Permanent
	1	Hearing Referral/Test Results (Fail Tests and Prescriptions)	Permanent	Permanent		4 Years	Permanent
	(a)	Immunization Notification/Requests	(a)	(a)	Most Current	--	
	1	Immunization Record (Student)	Permanent	Permanent	With "Cum" File	4 Years	Permanent
CD-2206	1	Parents Report - Child's Preadmission Health History	Permanent	Permanent		4 Years	Permanent
	1	Physical Performance Test Report Annual Report	Permanent	Permanent		4 Years	Permanent
CD-2207	1	Physician's Report - Child's Preadmission Health History	Permanent	Permanent		4 Years	Permanent
	(a)	Release of Health Information Authorization	(a)	(a)	Retain Until Information is Received	--	--
	(a)	Restricted Physical Education Activity Guide	(a)	(a)	Most Current	--	--
PM-236	1	School Immunization Survey Annual Report	3	4	--	--	
	(a)	Scoliosis Referral/Screen Results	(a)	(a)	Most Current	--	--
	3	Student Physical Evaluation	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Vision Referral/Test Results (Fail Tests and Prescriptions)	(a)	(a)	Until Graduation	4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

Insurance Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
	1	Accident or Injury Reports - Industrial Injury	Permanent	Permanent		4 Years	Permanent
	1	Accident or Injury Reports - Involving a Minor for Which a Claim For Damages has been Filed (all records including the insurance policy)	Permanent	Permanent	(A)	4 Years	Permanent
	3	Accident or Injury Reports - No Claim Filed	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Accident or Injury Reports - Other - After Litigation	3 Years	4 Years	Timing/Fiscal Year	--	--
CAL/OSHA No.200	2	Log and Summary of Occupational Injuries and Illness	5 Years	5 Years	Timing/Fiscal Year	--	--
	1	Policies - Involving a Minor for Which a Claim for Damages has been Filed	Permanent	Permanent	(A)	4 Years	Permanent
	3	Policies - Other - After Policy Period	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Reports - Insurance - Annual	Permanent	Permanent		4 Years	Permanent
DE-56 (DE-8112)	3	Unemployment Insurance, Local Experience Charges	3 Years	4 Years	Timing/Fiscal Year	--	--
J-3	1	Unemployment Insurance Report - K-12	Permanent	Permanent		4 Years	Permanent
	1	Unemployment Insurance Returns	Permanent	Permanent		4 Years	Permanent
	3	Workers' Compensation Insurance Letters from Vendors	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

(A) These records cease to be Class 1 - - Permanent records one year after the claim has been settled or the statute of limitations has run. Title 5,16023 (c) (2) (B)

J Forms/State Forms

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-3	1	Unemployment Insurance Reports K-12	Permanent	Permanent		4 Years	Permanent
J-4	1	Claim for Reimbursement for County School Service Fund	Permanent	Permanent		4 Years	Permanent
J-4-A	1	Cooperative County Publication Projects Approval of Meetings and Attendees	Permanent	Permanent		4 Years	Permanent
J-7	1	Report of Regular Day Classes and Enrollment for Kindergarten and Elementary Grades	Permanent	Permanent		4 Years	Permanent
J-7 CSR	1	Report of Enrollment for Kindergarten and Grade One through Three for School Districts and Charter Schools Participating in the K-3, Class Size Reduction Program	Permanent	Permanent		4 Years	Permanent
J-9 MH-A	1	Morgan-Hart Program to Reduce Class Size in Grade 9	Permanent	Permanent		4 Years	Permanent
J-9-A	1	Annual Certification of the Application for Specialist Teachers in Reading	Permanent	Permanent		4 Years	Permanent
J-10	1	Certification of the Application for Allowance for Specialist Teachers in Reading	Permanent	Permanent		4 Years	Permanent
I-10-B	3	Preliminary Certification for the Application for Allowance for Specialist Teachers in Reading	3 Years	4 Years	Timing/ Fiscal Year	--	
J-12	1	Instructional Television Program Cost Data Report	Permanent	Permanent		4 Years	Permanent
J-13	1	Request for Allowance on Attendance Because of Emergency Conditions	Permanent	Permanent		4 Years	Permanent
J-14.1	1	Affidavit of the Proper Certification for Work Performed by Certificated Employees	Permanent	Permanent		4 Years	Permanent
J-16	1	Application for District Authority for Issuance for Warrants	Permanent	Permanent		4 Years	Permanent
J-18.1	1	Report of Small Elementary Schools	Permanent	Permanent		4 Years	Permanent
St Software J-18/19-A) (J-19-A)	1	Annual Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19A) (J-19-ASuppl)	1	Annual Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-19E-A)	1	Annual Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-18-A)	1	Annual Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19A) (J-18-ASuppl)	1	Annual Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
(St Software (J-18/19-Suppl)	1	Annual Report of Attendance for Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-A) (J-19-A)	1	Final Report of Adult Education ADA	Permanent	Permanent		4 Years	Permanent
St Software (J18/19-C-A) (J-19-ASuppl) County	1	Annual Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent
St Software (J18/19-C-A) (J-18-ASuppl) County	1	Annual Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

J Forms/State Forms ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
St Software (J18/19-C-P1 (J-19-P1) Suppl (County)	1	First Period Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
St Software J-18/19-C-P2 (J-19-P2)	1	Second Period Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 years	Permanent
St Software (J18/19-C-P2 (J-19-P2) Suppl (County)	1	Second Period Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 years	Permanent
St Software (J-18/19 CH-P1)	1	Charter School ADA Funded Through Revenue Limits (E.C.42238) First Period Report of Attendance.	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19 CH-P2)	1	Charter School ADA Funded Through Revenue Limits (E.C.42238) Second Period Report of Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J18/19CH-A)	1	Charter School ADA Funded Through Revenue Limits (E.C.42238) Annual Report of Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19 CH/ BG/U-P1)	1	Charter School ADA Funded Through Block Grants (E.C.47633) First Period Report of Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19 CH/ BG/U-P2)	1	Charter School ADA Funded Through Block Grants (E.C.47633) Second Period Report of Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19 CH/BG/U-A)	1	Charter School ADA Funded Through Block Grants (E.C.47633) Annual Report of Attendance	Permanent	Permanent		4 Years	Permanent
J-18/19 CH/E	1	Charter School Educationally Disadvantaged Pupil Data	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-19-P1)	1	First Period Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-19-P1) Supplement	1	First Period Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-19E-P1)	1	First Period Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-18-P1)	1	First Period Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) (J-18-P1) Supplement	1	First Period Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-18-P2)	1	Second Period Report of Attendance for Kindergarten and Elementary Pupils Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-18-P2) Supplement	1	Second Period Report of Attendance for Kindergarten and Elementary Pupils Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

- - Feasibility to Microfilm at District Discretion

J Forms/State Forms ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
St Software (J-18/19-P1)	1	First Period Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P1) Supplement	1	First Period Report of Attendance for Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2)	1	Second Period Report of Attendance for Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) Supplement	1	Second Period Report of Attendance For Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-19-P2)	1	Second Period Report of Attendance for High School Students Residing in the District	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-19-P2 Supplement)	1	Second Period Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
St Software (J-18/19-P2) (J-19E-P2)	1	Second Period Report of Attendance for Jr. High School Grades 7 and 8 Only	Permanent	Permanent		4 Years	Permanent
J-20	1	County Superintendent's Report of Small Schools	Permanent	Permanent		4 Years	Permanent
J-20-P1	1	Report of Necessary Small Schools	Permanent	Permanent		4 Years	Permanent
J-20-P2	1	Report of Necessary Small Schools	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A)	1	Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A)	1	Annual Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A)	1	Annual Report of Attendance for Special Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-A Supplement)	1	Supplement to Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 years	Permanent
St Software (J-22-P1)	1	First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P1)	1	First Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P1)	1	First Period Report for Special Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P1 Supplement)	1	Supplement to First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2)	1	Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2)	1	Second Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2)	1	Second Period Report for Special Programs	Permanent	Permanent		4 Years	Permanent
St Software (J-22-P2 Supplement)	1	Supplement to Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
J-22.2A	1	Driver Training Cost Data Report	Permanent	Permanent		4 Years	Permanent
J-22.2A-W	3	Worksheet for Driver Training Cost Data Report	3 Years	4 Years	Timing/Fiscal Year	--	--
J-22.26	1	Report of Replaced Driver Training Vehicles and Simulators Used Exclusively for Driver Training	Permanent	Permanent		4 Years	Permanent
J 22.2C	1	Report of Driver Training Vehicles or Simulators	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

- - Feasibility to Microfilm at District Discretion

J Forms/State Forms ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-22.4	1	Application for Allowance for the Cost of Educating Exceptional Children Away from the District of Residence	Permanent	Permanent		4 Years	Permanent
St Software (J-27-P2) (County)	1	County Superintendent's Report of Schools and Classes Maintained on a County-wide Basis: Second Period Report for Elementary School Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-27/28)	1	Days of Attendance and ADA (Report by Elementary and Secondary)	Permanent	Permanent		4 Years	Permanent
	(a)	Declaration of Residency and Responsibility	No legal requirement	1 Year			-
St Software (J-27/28-A) (J-27-A) (J-28-A)	1	County Superintendent's Report of Schools and Classes Maintained: Annual Report of Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
St Software (J-27/28-P1) (J-27-P1) (J-28-P1)	1	County Superintendent's Report of Schools and Classes Maintained: First Period Report for Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
J-27/28-P2 (J-28-P2) (J-27-P2)	1	County Superintendent's Report of Schools and Classes Maintained: First Period Report for Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
J-29-B Annual	1	Report of the Amount of Taxes Collected and Distributed for the Fiscal Year for School Districts	Permanent	Permanent		4 Years	Permanent
J-29-B	1	Report of the Estimated Amount of Taxes to be Collected for School Districts	Permanent	Permanent		4 Years	Permanent
J-29-C Annual	1	Report of the Amount of Taxes Collected and Distributed to the County Superintendent of Schools	Permanent	Permanent		4 Years	Permanent
J-29-C	1	Report of the Estimated Amount of Taxes to be Collected for County Offices of Education	Permanent	Permanent		4 Years	Permanent
J-29.1	1	Report of "Miscellaneous" Funds	Permanent	Permanent		4 Years	Permanent
J-30	1	Notification of Intent to Utilize the State Credit System Instructional Materials Fund	Permanent	Permanent		4 Years	Permanent
(J-30) old	1	Application for Severance Allowance on Account of Property Acquired for State Highway Purposes	Permanent	Permanent		4 Years	Permanent
J-31	1	Notification of Intent to Direct Order Instructional Materials Using State Instructional Materials Allowance	Permanent	Permanent		4 Years	Permanent
(J-31) old	1	Report of Open Space Land Adjustment	Permanent	Permanent		4 Years	Permanent
J-32	3	State School Register	3 Years	4 Years	Timing/Fiscal Year	--	--
J-35	1	Report of Necessary Small High School (Not Required for Necessary Continuation Schools)	Permanent	Permanent		4 Years	Permanent
J-43	1	Annual Report of Current Liabilities	Permanent	Permanent		4 Years	Permanent
J-43-A	1	Annual Report of Accounts Receivable	Permanent	Permanent		4 Years	Permanent
J-50 Series	1	Second Principal Apportionment Special Education Forms for School Districts, County Offices of Education, and Special Education Local Plan Areas	Permanent	Permanent		4 Years	Permanent
J-50	1	Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-50-A	1	Annual Report for Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-50-P1	1	First Period Report for Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-50-P2	1	Second Period Report for Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-51	1	Classes for Adults Cost Data Report	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

J Forms/State Forms ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-51-W	3	Worksheet for Classes for Adults Cost Data Report	3 Years	4 Years	Timing/Fiscal Year	--	--
J-65	1	Report of Attendance for Development Centers for the Handicapped	Permanent	Permanent		4 Years	Permanent
J-66	1	Cost Data Report for the Development Center for Handicapped Pupils Programs	Permanent	Permanent		4 Years	Permanent
J-66-W	3	Worksheet for the Cost Data Report for the Development Center for Handicapped Pupils Program	3 Years	4 Years	Timing/	--	--
J-67	1	Certification of Total Income, Attendance and Transportation for Development Centers for Handicapped Pupils	Permanent	Permanent		4 Years	Permanent
J-73	1	County School Service Fund I. Financial Report II. Final Budget III. Preliminary Budget	Permanent	Permanent		4 Years	Permanent
J-73-A	1	County School Service Fund Supplemental Annual Financial Report	Permanent	Permanent		4 Years	Permanent
J-73-A1	3	Audio Visual Worksheet for the County School Service Fund	3 Years	4 Years	Fiscal	--	--
J-73-C	1	County School Service Fund Financial Report Supplement Cost Data Report	Permanent	Permanent		4 Years	Permanent
J-73-CW	3	Worksheet for County School Service Fund Financial Report Supplemental Cost Data Report	3 Years	4 Years	Timing/	--	--
J-73-J	1	County School Service Fund - Project Expenditure Detail	Permanent	Permanent		4 Years	Permanent
J-73-P	1	County School Service Fund - Position Schedule	Permanent	Permanent		4 Years	Permanent
J-73-R	1	Request for Revision of County School Service Fund	Permanent	Permanent		4 Years	Permanent
J-73-S	1	County School Service Fund Budget - Supplemental Schedule	Permanent	Permanent		4 Years	Permanent
J-73-T	1	Second Period Attendance Reporting Special Education	Permanent	Permanent		4 Years	Permanent
J-73.1	1	Report of Accounts Receivable	Permanent	Permanent		4 Years	Permanent
J-73.2	1	Report of Current Liabilities	Permanent	Permanent		4 Years	Permanent
J-73.4	1	Expenditure of ECIA Funds	Permanent	Permanent		4 Years	Permanent
J-90-B	1	Health and Welfare Benefits, Certificated Personnel in the Teacher Bargaining Unit	Permanent	Permanent		4 Years	Permanent
J-90-F	1	Salary Data by Employee Classification	Permanent	Permanent		4 Years	Permanent
J-90-S	1	Teacher Bargaining Unit Base Certificated Salary Schedule	Permanent	Permanent		4 Years	Permanent
J-111	1	Application for Exemption from the Classroom Teacher Salary Limitation	Permanent	Permanent		4 Years	Permanent
J-111-A	1	Report of Individual Class Sessions as Required by Education Code Section 41374	Permanent	Permanent		4 Years	Permanent
SACS-TRAN (J-141)	1	Annual Report of Pupil Transportation Expense	Permanent	Permanent		4 Years	Permanent
SACS-TRAN (J-141CW-1)	3	Worksheet for Cost Data for a Cooperative Pupil Transportation System	3 Years	Permanent	Report is Class 1 (7 Yr. Statute of Limitations)	--	
SACS-TRAN (J-141CW-2)	1	Worksheet for a Cooperative Pupil Transportation System	Permanent	Permanent	Only Report Filed	4 Years	Permanent
SACS-TRAN (J-141-DEP)	3	Worksheet for Compiling Data for Computing Depreciation on District-Owned School Buses Used for Transportation Out-of-State or Community Recreation	3 Year	Permanent	Timing/Fiscal Year	--	--
SACS-TRAN (J141ROC/P)	1	Annual Report of ROC/P Transportation	Permanent	Permanent		4 Years	Permanent
SACS-TRAN (J-141-S)	1	Annual Report of Special Education Transportation Expense	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

- - Feasibility to Microfilm at District Discretion

J Forms/State Forms ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
SACS-TRAN (J-141-SW)	3	Worksheet for Special Education Pupil Transportation Data Report	3 Years	4 Years	Report is Class 1 (7 Yr. Statute of Limitations)	--	--
SACS-TRAN (J-141-T)	1	Transfer of Transportation Services	Permanent	Permanent		4 Years	Permanent
SACS-TRAN (J-141-W)	3	Worksheet for Cost Data Report for a Single District Pupil Transportation System	3 Years	Permanent	Report is Class 1 (7 Yr Statute of Limitations)	--	
SACS-TRAN (J-142)	1	Report of Replaced School Buses	Permanent	Permanent		4 Years	Permanent
SACS-TRAN (J-143)	1	Report of School Buses Purchased	Permanent	Permanent		4 Years	Permanent
J-152	1	Report of Attendance and Cost of Educating Adults in County Correctional Facilities	Permanent	Permanent		4 Years	Permanent
SACS (J-200)	1	Final Annual Financial and Budget Report	Permanent	Permanent		4 Years	Permanent
SACS (J-200)	1	Tentative Annual Financial and Budget Report	Permanent	Permanent		4 Years	Permanent
SACS (J-200/300) (J-41)	1	Annual Financial and Budget Report	Permanent	Permanent-		4 Years	Permanent
SACS (J-200/300) (J-44)	1	Annual Report of Abatements of Expenditures	Permanent	Permanent		4 Years	Permanent
SACS (J-251)	1	First Interim Financial Report	Permanent	Permanent		4 Years	Permanent
SACS (J-251)	1	Interim Financial Reports	Permanent	Permanent		4 Years	Permanent
SACS (J-251)	1	Second Interim Financial Report	Permanent	Permanent		4 Years	Permanent
SACS (J-301-CE) (J-41-CE)	1	Annual Financial Report -Continuation Education Schools	Permanent	Permanent		4 Years	Permanent
SACS-PCR (J-380)	1	Annual Program Cost Data Report, Single District	Permanent	Permanent		4 Years	Permanent
SACS (J-380 Matrix)	1	Prior Year Expenditures by Object Within Program for General Fund	Permanent	Permanent		4 Years	Permanent
SACS (J-380) (141-A)	1	Supplemental Annual Financial Report	Permanent	Permanent		4 Years	Permanent
SACS (J-380/580 Matrix)	1	National Public Education Financial Survey	Permanent	Permanent		4 Years	Permanent
SACS -CEA (J-385)	1	Current Expense Formula/Minimum Classroom Comp	Permanent	Permanent		4 Years	Permanent
SACS -CAT (J-390)	1	Categoricals - Fed/St/Local Grant Awards, Rev & Exp	Permanent	Permanent		4 Years	Permanent
SACS (J-400/500)	1	Annual Financial and Budget Report, County Superintendent of Schools	Permanent	Permanent		4 Years	Permanent
SACS (J-600/700)	1	Annual Financial and Budget Report, Joint Powers Agencies	Permanent	Permanent		4 Years	Permanent
SACS (J-780)	1	Annual Program Cost Data Report, Joint Powers Agencies	Permanent	Permanent		4 Years	Permanent
J-PCP	1	Application for Special Allowance for Project-Connected Pupils	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

Legal Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
		Election Calls	Permanent	Permanent		4 Years	Permanent
	1	Election Returns	Permanent	Permanent		4 Years	Permanent
	2	Legal Opinions - County Counsel	4 Years	4 Years	Save until Superseded	--	--
	2	Litigation Documents (Including Subpoenas)	4 Years	Permanent	Save until 3 Years after Case has been Settled or Decided and all Rights of Appeal have Expired	--	--
	1	Reorganizational File	Permanent	Permanent	4 Years	4 Years	
	1	Territorial Transfers File	Permanent	Permanent	4 Years	4 Years	

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Maintenance & Operations Records

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
	3	Budget Justification Forms	4 Years	4 Years	Department Use	--	--
	2	Construction Files	5 Years	5 Years	(A)	--	--
	(a)	Correspondence - General	0 Years	1 Year	Reference Purposes	--	--
	3	Deferred Maintenance Certification	5 Years	8 Years	In case of audit	8 years	
SAB 40-1	3	Deferred Maintenance Five Year Plan	5 Years	8 Years	In case of audit	8 years	
	3	Emergency Orders (Original)	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Facilities Inventory	Permanent	Permanent		4 Years	Permanent
	3	Inspection Reports	3 Years	4 Years	Timing/Fiscal Year	--	--
	(a)	Job Requisitions	0 Years	1 Year	Reference Purposes	--	--
	3	Job Requisitions Log	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Memoranda - In and Out	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Preventive Maintenance Schedules	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Service Call Orders	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Time Reports	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Vandalism Inspection Reports	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Work Orders	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Work Reports	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

Payroll Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
DE43 DE7	1	Annual Reconciliation of California Personal Income Tax Withheld -EDD	Permanent	Permanent		4 Years	Permanent
	1	Deduction Register (Voluntary or Withholding)	Permanent	Permanent		4 Years	Permanent
W-2C	1	Corrected Wage and Tax Statement	Permanent	Permanent		4 Years	Permanent
DE9423	1	Contribution Return and Report of School Employees Wages Under the Unemployment Insurance Code	Permanent	Permanent		4 Years	Permanent
	1	Earnings Reports (Quarterly)	Permanent	Permanent		4 Years	Permanent
W-4	1	Employee's Withholding Allowance Certificate	Permanent	Permanent		4 Years	Permanent
	1	Federal Withholding Tax Reports	Permanent	Permanent		4 Years	Permanent
DE8112	1	Notice of Local Experience Charge for Calendar Quarter Ended	Permanent	Permanent		4 Years	Permanent
	1	Payroll Adjustment Orders	Permanent	Permanent		4 Years	Permanent
	3	Payroll ("A") Warrants	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Payroll ("A") Warrant Registers	Permanent	Permanent		4 Years	Permanent
	1	Payroll and Salary Records	Permanent	Permanent		4 Years	Permanent
	1	Payroll Office Records	Permanent	Permanent		4 Years	Permanent
DE9423	1	Quarterly Contribution Return and Report of School Employees Wages Under the Unemployment Insurance Code	Permanent	Permanent		4 Years	Permanent
DE8003 (DE938SEF)	1	Quarterly Contribution Return Under the Unemployment Insurance Code	Permanent	Permanent		4 Years	Permanent
DE938	1	Quarterly PIT Return Adjustment Form	Permanent	Permanent		4 Years	Permanent
DE6	1	Quarterly Wage and Withholding Report	Permanent	Permanent		4 Years	Permanent
941	1	Employer's Quarterly Federal Tax Return	Permanent	Permanent		4 Years	Permanent
941C	1	Supporting Statement to Correct Information	Permanent	Permanent		4 Years	Permanent
DE88		Report of PIT Contributions	Permanent	Permanent		4 Years	Permanent
DE34	3	Report New Employees	3 Years	4 Years	Timing/Fiscal Year		
DE542	3	Report of Independent Contractors	3 Years	4 Years	Timing/Fiscal Year		
J-90	1	Salary & Benefits Schedule for the Certificated Bargaining Unit	Permanent	Permanent		4 Years	Permanent
DE3DP (DE3B)	1	State EDD Quarterly Contribution Return	Permanent	Permanent		4 Years	Permanent
	1	Status Changes (Employee)	Permanent	Permanent		4 Years	Permanent
	1	Termination Records - Payroll	Permanent	Permanent		4 Years	Permanent
	1	Time Records (Accrued Vacations, Sick Leave, etc.)	Permanent	Permanent		4 Years	Permanent
	1	Time Reports (Payroll - Certificated and Classified)	Permanent	Permanent		4 Years	Permanent
	3	Time Sheets/Cards	3 Years	4 Years	Timing/Fiscal Year	--	--
J-3	1	Unemployment Insurance Report	Permanent	Permanent		4 Years	Permanent
W-2	1	Wage and Tax Statement	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Personnel Records

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
	(a)	CBEDS Forms/Reports • County/District Information Form • School Information Form • All Standard CBEDS Output Reports	(a)	4 Years	Maintain for Reference Purposes for Fiscal Accountability	--	--
R-2	1	Employee Ratio Summary Certification Document	Permanent	Permanent		4 Years	Permanent
	3	Employment Applications	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Employment Eligibility Lists	3 Years	4 Years	Timing/Fiscal Year	--	--
J-90-B	1	Health and Welfare Benefits, Certificated Personnel in the Teacher Bargaining Unit	Permanent	Permanent		4 Years	Permanent
	1	Personnel Files (Terminated)	Permanent	Permanent		4 Years	Permanent
	3	Recruitment Files	3 Years	4 Years	Timing/Fiscal Year		--
	3	Returned Letters - Inactive Recruitment	3 Years	4 Years	Timing/Fiscal Year		--
J-90-F	1	Salary Data by Employee Classification	Permanent	Permanent		4 Years	Permanent
J-90-S	1	Teacher Bargaining Unit Base Certificated Salary Schedule	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

Property Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-200/300 (J-41)	1	Annual Financial and Budget Report Bond Interest and Redemption Fund State School Building Fund State School Building Lease-Purchase Fund	Permanent	Permanent		4 Years	Permanent
	1	Application for Capital Outlay Funds for Family Child Care Homes	Permanent	Permanent		4 Years	Permanent
	1	Appraisals	Permanent	Permanent		4 Years	Permanent
	2	Architect Agreements Audit (A)	5 Years	5 Years	Or More for Final	--	--
	1	Bid Conditions (Advertised)	Permanent	Permanent		4 Years	Permanent
	3	Bid Envelopes	3-6 Years	3-6 Years	--	--	--
	1	Bids: Capital Outlay - Successful Bidder	Permanent	Permanent		4 Years	Permanent
	1	Building Fund Records	Permanent	Permanent		4 Years	Permanent
	1	Capital Assets Valuation Record	Permanent	Permanent		4 Years	Permanent
	1	Capital Inventory Record	Permanent	Permanent		4 Years	Permanent
	1	Capital Outlay and General Non-Salary Payment Files	Permanent	Permanent		4 Years	Permanent
	1	Capital Property Loss Report	Permanent	Permanent		4 Years	Permanent
	1	Capital Property -Retirement	Permanent	Permanent		4 Years	Permanent
	1	Certification of Completion of Contract	Permanent	Permanent	Board Minutes	4 Years	Permanent
	1	Change Order (Construction)	Permanent	Permanent		4 Years	Permanent
	2	Contract for Construction Audit (A)	5 Years	5 Years	Or More for Final	--	--
	2	Contractor Payment Requests Audit (A)	5 Years	5 Years	Or More for Final	--	--
	1	Escrow Materials	Permanent	Permanent		4 Years	Permanent
	1	Fixed Assets (Detail Records)	Permanent	Permanent		4 Years	Permanent
	1	Joint Use Agreements	Permanent	Permanent		4 Years	Permanent
	1	Lease Agreements	Permanent	Permanent		4 Years	Permanent
	3	Materials and Labor Bonds	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Performance Bonds	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Property Ledger	Permanent	Permanent		4 Years	Permanent
	1	Records of Fixed Assets: Land: Deeds, Title Insurance, other agency approvals Buildings and Site Improvements: Drawings, Specifications, Contracts, Certifications of Compliance, Inspector of Record Verified Reports	Permanent	Permanent		4 Years	Permanent
	2	Schedule of Building Fund Vouchers Audit (A)	4 Years	4 Years	Or More for Final	--	--
SAB 184 (OAL 184)	1	Summary of Expenditure and Construction Progress	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

Pupil Personnel Services Records

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
	1	Authorization for Release of Pupil Services Information	Permanent	Permanent	With "Cum" File	4 Years	Permanent
	(a)	Psychological Screening and Diagnosis	(a)	4 Years	Internal Working Papers	--	
	1	Request for Counseling Services	Permanent	Permanent	With "Cum" File	4 Years	Permanent
	(a)	Request for Psychological Evaluation	(a)	4 Years	Internal Working Papers	--	
	(a)	Request for Teaching Services	(a)	4 Years	Internal Working Papers	--	--

NOTE: Also refer to Special Education Records

Papers

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

(a) - No Legal Requirements

Pupil Records

A pupil's cumulative record is of a continuing nature as it is active and useful over a period of time, if not transferred, and is not classified until such usefulness has ceased or the pupil ceases to be enrolled in the district. (Title 5, Division 1, Chapter 16, sub-chapter 2, article 1, Section 16022 (b) for k-12 and Title 5, Division 6, Chapter 10, sub-chapter 2.5, article 1, Section 59022 (b) for C.C. of the California Code of Regulations)

For further information as to what records make up a pupil's/student's record, the reader should read Title II, Division 4, Part 27, Chapter 6.5 PUPIL RECORDS (K-12) or Title III, Division 7, Part 47, Chapter 1.5 STUDENT RECORDS (C.C.) in the California Education Code. Pertinent portions of the 2 chapters appear in the Legal Provisions section of this document.

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
	(a)	CBEDS Forms/Reports • County/District Information Form • School Information Form • All Standard CBEDS Output Reports	(a)	4 Years	Maintain for Reference Purposes for Fiscal Accountability	--	--
SCRP-01	3	Crime and Violence - Penal Code Sections 628,628.1 and 628.2	3 Years	Permanent	Possible Litigation	--	--
	3	Input for Computer/Attendance Information	3 Years	4 Years	Fiscal Accountability	--	--
	3	Notes from Parents	3 Years	4 Years	Fiscal Accountability	--	--
	1	Pupil Locator and History Card (To District office when pupil leaves)	Permanent	Permanent		4 Years	Permanent
	1	Pupils Cumulative Record	Permanent	Permanent		4 Years	Permanent
J-32	3	State School Register	<u>3 Years</u>	<u>4 Years</u>	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

(a) - No Legal Requirements

Purchasing Records

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
	3	Air Travel Reservations	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Purchase Orders (Numerical, Alpha, Blanket, Etc.)	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Purchasing Bids	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Requisitions	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Standard School Supplies Agreements	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Regional Occupation Centers/Programs

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J27/28	1	County Superintendent Report of Schools and Classes Maintained, Second Period Report of Elementary and High School Attendance	Permanent	Permanent		4 Years	Permanent
J27/28-A	1	County Administered ROC/P ADA Report	Permanent	Permanent		4 Years	Permanent
State Software (J18/19)	1	ROC/P JPA Participating Districts' Report of ROP Attendance	Permanent	Permanent		4 Years	Permanent
State Software (J22-A)	1	Annual Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
J-141-ROC/P	1	Annual Report of ROC/P Transportation Expense	Permanent	Permanent		4 Years	Permanent
VE-77		Application for ROC/ROP Course Approval	Permanent	Permanent	OBSOLETE	4 Years	Permanent
VE-77R		Course Revision Approval - ROC/ROP	Permanent	Permanent	OBSOLETE	4 Years	Permanent
State Software (J-22-P1)	1	First Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
State software (J-22-P2)	1	Second Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
Form R/Y (P1) & (A)	1	Form for Determination of the Revenue Limit	Permanent	Permanent		4 Years	Permanent
VE-73		Report of Revenues Earned by ROC/P Centers and Programs	Permanent	Permanent	OBSOLETE	4 Years	Permanent
VE-78	1	ROC/ROP Course Verification	Permanent	Permanent	Filed electronically- no form retained	4 Years	Permanent
VE-80-A		ROC/P Annual Staff Report	Permanent	Permanent	NO LONGER REQUIRED	4 Years	Permanent
VE-80-B /CDE 101E-1	1	ROC/P Annual Enrollment	Permanent	Permanent		4 Years	Permanent
VE-80-C /CDE101E-2	1	ROC/P Annual Follow-up of Programs Completers	Permanent	Permanent		4 Years	Permanent
Schedule A	1	Schedule to Determine the Data to Compute the Revenue Limit	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

Retirement Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
OASDI							
	1	OASDI Reports Permanent	Permanent	4 Years	Permanent		
	1	States Reports of Adjustments -OASDI	Permanent	Permanent		4 Years	Permanent
		---			-	-	-
PERS							
	3	Membership Data Forms - PERS	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Payroll Listing for PERS	Permanent	Permanent		4 Years	Permanent
	3	Request for Final Payroll Information - PERS	3 Years	4 Years	Timing/Fiscal Year	--	--
STRS							
	2	Certificate of Termination and Computation of Sick Leave - STRS	4 Years	5 Years	Final Audit	--	--
	3	Membership Data Forms - STRS	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Sick Leave Summary Transmittal - STRS	Permanent	Permanent		4 Years	Permanent
	3	STRS Approval of Disability Allowance	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	STRS - Contribution Transmittal Report	Permanent	Permanent		4 Years	Permanent
	1	STRS Report of Retirement Contributions (Monthly)	Permanent	Permanent		4 Years	Permanent
	3	STRS Verification of Services	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	STRS Verification (Part-time and Substitute)	3 Years	4 Years	Timing/Fiscal Year	--	--
OTHER							
	3	Authorization for Contribution and/or Rate Adjustment	3 Years	4 Years	Payment Period Plus 3 Years	--	--
	3	Report of Status Change or Separation	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Retirees Separation Listing	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

Special Education Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-22-A	1	Annual Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent		4 Years	Permanent
J-50-A	1	Annual Report for Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-18/19-C-A (J-1 9-A) Supplement (County)	1	Annual Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent
J-22-A	1	Annual Report of Attendance for Special Programs	Permanent	Permanent		4 Years	Permanent
J-18/19-C-A (J-18-A) Supplement (County)	1	Annual Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Master Plan for Special Education Programs	Permanent	Permanent		4 Years	Permanent
J-2728-A	1	Annual Report of Attendance for Students Residing in the District/County Superintendent Report of Schools and Classes Maintained	Permanent	Permanent		4 Years	Permanent
J-141-S /SACS TRAN	1	Annual Report of Special Education Transportation Expense	Permanent	Permanent		4 Years	Permanent
J-201-SEA	1	Special Education Revenue Allocation	Permanent	Permanent		4 Years	Permanent
	1	Application for Developing a Local Education Agency Plan for Special Education	Permanent	Permanent		4 Years	Permanent
SE-65	1	Application to Renew Program Approval for Program for Educationally Handicapped	Permanent	Permanent		4 Years	Permanent
	2	Assessment Plan/Reports	3 Years	Permanent	Possible Litigation	4 Years	Permanent
CD-1400	1	Attendance and Fiscal Report for Special Programs for the Severely Handicapped	Permanent	Permanent		4 Years	Permanent
J-67	1	Certification of Total Income, Attendance and Transportation for Development Centers for Handicapped Pupils	Permanent	Permanent		4 Years	Permanent
	1	Child-by-Child Plan: Basic Diagnostic Data	Permanent	Permanent		4 Years	Permanent
J-66	1	Cost Data Report for Development Center for the Handicapped Pupils Program	Permanent	Permanent		4 Years	Permanent
794-017	1	Final Expenditure and Performance Report for P.L.94-142	Permanent	Permanent		4 Years	Permanent
J-22-P1	1	First Period Report for Handicapped Pupils Attending ROC/P	Permanent	Permanent		4 Years	Permanent
J-50-P1	1	First Period Report for Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-22-P1	1	First Period Report for Special Programs	Permanent	Permanent		4 Years	Permanent
J-18/19-C-P1 (J-19-P1) Supplement (County)	1	First Period Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
J-18/19-C-P1 (J-18-P1) Supplement (County)	1	First Period Report of Elementary Attendance for County Superintendent of schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
J-2728-P1	1	First Period Report of Attendance for Students Residing in the District/County Superintendent Report of Schools and Classes Maintained	Permanent	Permanent		4 Years	Permanent
OE-9058	1	Handicapped Children Receiving Special Education and Related Services	Permanent	Permanent		4 Years	Permanent
	3	Individualized Education Program	3 Years	Permanent	Possible Litigation	-	--
0E-9055-1	1	Incentive Grant Application Under Part B of the Education of the Handicapped Act, as Amended by P.L.94-142	Permanent	Permanent		4 Years	Permanent

NOTE: Also refer to Pupil Personnel Services Records

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

- - Feasibility to Microfilm at District Discretion

Special Education Records ... continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
SED86-02	2	Interagency Implementation of Chapter 265 Government Code Data Report	4 Years	5 Years	Final Audit	--	--
	2	Licensed Children Institution Emergency Impaction Funds Request	4 Years	5 Years	Final Audit	--	--
	2	Low Incidence Directory (per E.C. Section 56137, collected every 2 years.)	4 Years	5 Years	Final Audit	--	--
	2	Parent Consent for Release of Information	3 Years	Permanent	Possible litigation	--	--
	2	Parent Notification of Meeting and Intent to Participate	3 Years	Permanent	Possible litigation	--	--
	2	Parent Rights and Procedure Safeguard	3 Years	Permanent	Possible Litigation	--	--
R-1	1	Private School Affidavit	Permanent	Permanent		4 Years	Permanent
	2	Record of Local Review and/or Referral	3 Years	Permanent	Possible Litigation	--	--
	2	Registration of Visually Handicapped Students	4 Years	4 Years	--	--	
J-65	1	Report of Attendance for Development Centers for the Handicapped	Permanent	Permanent		4 Years	Permanent
	1	Report of Special Education Due Process Hearings	Permanent	Permanent		4 Years	Permanent
J-22-P2	1	Second Period Report for Handicapped Pupils Attending an ROC/P	Permanent	Permanent	--	--	
J-50-P2	1	Second Period Report for Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
J-22-P2	1	Second Period Report for the Gifted Supplement and Talented Program	Permanent	Permanent		4 Years	Permanent
J-18/19-C-P2 (J-19-P2) Supplement (County)	1	Second Period Report of Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
J-18/19-C-P2 (J-18-P2) Supplement (County)	1	Second Period Report of Elementary Attendance for County Superintendent of Schools for Education of Students in County Operated Community Schools and Special Education Programs	Permanent	Permanent		4 Years	Permanent
J-27/28-P2	1	Second Period Report of Attendance for Students in the District/County Superintendents Report of Schools and classes maintained	Permanent	Permanent		4 Years	Permanent
J-50 Series	1	Second Principal Apportionment Special Education Forms for School Districts, County Offices of Education, and Special Education Local Plan Areas	Permanent	Permanent		4 Years	Permanent
	1	Selpa Special Education Funding Exhibit New Funding Model	Permanent	Permanent		4 Years	Permanent
SE 06-90	2	Special Education End-of-Year Report	4 Years	5 Years	Final Audit	--	--
	2	Special Education FRZ Forms	4 Years	5 Years	Final Audit	--	--
J-50	1	Special Education Master Plan	Permanent	Permanent		4 Years	Permanent
	2	Special Education Program Review Evaluation Report	4 Years	5 Years	Final Audit	--	--
R-30 SE	1	Special Education Pupil Count	Permanent	Permanent		4 Years	Permanent
776-001	3	Special Materials and Equipment Report (For Disabled Students)	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	Structured Interview Guide for Special Education Programs in California	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Survey of Special Education Programs	Permanent	Permanent		4 Years	Permanent
OSE-01	2	Waiver Request	4 Years	4 Years	--	--	
J-66-W	3	Worksheet for Cost Data Report for Development Centers for the Handicapped Pupils Program	3 Years	4 Years	Timing/Fiscal Year	--	--
J-141-SW /SACS TRAN	3	Worksheet for Special Education Pupil Transportation Data Report	3 Years	4 Years	Report is Class 1 (7 Yr. Statute of Limitations)	--	--

NOTE: Also refer to Pupil Personnel Services Records

Class 1 -Permanent Records

Class 2 -Optional Records

Class 3 -Disposable Records

-- Feasibility to Microfilm at District Discretion

Special Schools Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CAL-SAFE							
C-1 -A	1	Annual Report for Cal-SAFE Child Care Funding	Permanent	Permanent		4 Years	Permanent
B - A	1	Annual Report of Attendance for Students Enrolled in District Cal-SAFE Programs	Permanent	Permanent		4 Years	Permanent
C-1 - P1	1	First Period Report for Cal-SAFE Child Care Funding	Permanent	Permanent		4 Years	Permanent
B-P1	1	First Period Report of Attendance for Students Enrolled in District Cal-SAFE Programs	Permanent	Permanent		4 Years	Permanent
C-1- P2	1	Second Period Report for Cal-SAFE Child Care Funding	Permanent	Permanent		4 Years	Permanent
B - P2	1	Second Period Report of Attendance for Students Enrolled in District Cal-SAFE Programs	Permanent	Permanent		4 Years	Permanent
CHARTER SCHOOLS							
J-18/19CH -A	1	Annual Report of Charter School ADA Funded Through Revenue Limit (E.C.42238)	Permanent	Permanent		4 Years	Permanent
J-18/19CH/E	1	Charter School Educationally Disadvantaged Pupil Data	Permanent	Permanent		4 Years	Permanent
CHARTER SCHOOLS ...continued							
J-18/19CH-P1	1	First Period Report of Charter School ADA Funded Through Revenue Limits (E.C.42238)	Permanent	Permanent		4 Years	Permanent
J-18/19CH-P2	1	Second Period Report of Charter School ADA Funded Through Revenue Limits (E.C.42238)	Permanent	Permanent		4 Years	Permanent
JUVENILE COURT SCHOOLS							
A127D	2	Annual Expenditure Report, Part II. Part of Consolidated Application for Education Programs, ECIA Chapter I	4 Years	5 Years	Final State/Federal Audit	--	--
SDE-100	2	Application for Funding:Consolidated Categorical Aid Programs	4 Years	5 Years	Final Audit	--	--
	2	California State Department of Education Expenditure Report, PL 94-142	4 Years	5 Years	Final Audit	--	--
J-27/28	1	Monthly Report of Attendance in Classes for Special Schools	Permanent	Permanent		4 Years	Permanent
J-32	3	State Schools Registers - Centralized Attendance at Juvenile Halls	3 Years	4 Years	Timing/Fiscal Year	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

State & Federal Special Projects/Programs

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
ADULT EDUCATION							
	2	ABE Total Enrollment Report	4 Years	5 Years	Final State/Federal Audit	--	--
A-22	2	Adult Education Program Approval	4 Years	5 Years	Final State/Federal Audit	--	--
VE-81-B	2	Adult Education - Vocational Program Annual Enrollment Report Form	4 Years	5 Years	Final State/Federal Audit	--	-
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
A-22	2	Application for Federal Funding under PL 91-230, Section 306	4 Years	5 Years	Final State/Federal Audit	--	--
A-22	2	Application for Federal Funding Under PL 100-297, Section 321	4 Years	5 Years	Final State/Federal Audit	--	--
J-51	1	Classes for Adults Cost Data Report	Permanent	Permanent		4 Years	Permanent
J-18/19-A (J-19-A) Addendum	1	Final Report of Adult Education ADA	Permanent	Permanent		4 Years	Permanent
J-18/195-A	1	District Supplement - Annual Report of Attendance for High School Students Residing Outside the Reporting District if Tuition is Charged	Permanent	Permanent		4 Years	Permanent
J-152	1	Report of Attendance and Cost of Educating Adults in County Correctional Facilities	Permanent	Permanent		4 Years	Permanent
	3	Section 321 Letter of Intent	3 Years	4 Years	Timing/Fiscal Year	--	--
J-51-W	3	Worksheet for Classes for Adults Cost Data Report	3 Years	4 Years	Timing/Fiscal Year	--	--
BILINGUAL EDUCATION							
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Application for Subgrant Emergency Immigrant Education Assistance	4 Years	5 Years	Final State/Federal Audit	--	--
A127W-BT2	(a)	Bilingual Teacher Waiver Information	(a)	1 Year	Must Apply Annually	--	--
	2	Budget and Program Information: Emergency Immigrant Education Assistance Program	4 Years	5 Years	Final State/Federal Audit	--	--
A127W-BT3	(a)	Certificate of Partial Completion	(a)	1 Year	Must Apply Annually	--	--
A127W-BT1	(a)	Check List of Assurances	(a)	1 Year	Must Apply Annually	--	-
AO-400	1	Emergency Immigrant Education Program (EIEP) Grant Award	Permanent	Permanent		4 Years	Permanent
	2	Emergency Immigrant Education Program (EIEP) Proposed Budget & Activities	4 Years	5 Years	Final State/Federal Audit	--	--
	1	Final Expense Report Emergency Immigrant Education Assistance Program	Permanent	Permanent		4 Years	Permanent
	1	Final Fiscal & Performance Report: Emergency Immigrant Education Program	Permanent	Permanent		4 Years	Permanent
R-30-LC	1	Language Census Report - School Data	Permanent	Permanent		4 Years	Permanent
SDE-103	2	Program Information: Emergency Immigrant Education Assistance Program	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Refugee Student Report	4 Years	4 Years	--	--	--
	2	Test Results Reporting Form for Compensatory Education and State Bilingual Audit Education Programs	4 Years	5 Years	Final State/Federal Audit	--	--
ED-GCS007	1	U.S. Department of Education Grant Award Notification	Permanent	Permanent		4 Years	Permanent
A127W-BT CAL-SAFE	(a)	Waiver Request Bilingual Teacher	(a)	1 Year	Must Apply Annually	--	
Form A	1	County Cal-SAFE Programs Attendance Report	Permanent	Permanent		4 Years	Permanent
Form B	1	District Cal-SAFE Attendance Report	Permanent	Permanent		4 Years	Permanent

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion
(a) - No Legal Requirements

State & Federal Special Projects/Programs...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
BILINGUAL EDUCATION ...continued							
Form C-1	1	Cal-SAFE Child Care Funding for School Districts and County Offices of Education	Permanent	Permanent		4 Years	Permanent
Form C-2	1	Cal-SAFE Funding for County Offices of Education per E.C. 2551.3	Permanent	Permanent		4 Years	Permanent
Form C-2(a)	1	Cal-SAFE Funding for Students Attending Court Schools, Community Schools, and Community Day Schools	Permanent	Permanent		4 Years	Permanent
CLASS SIZE REDUCTION (CSR)							
Title VI Application	2	Federal CSR LEA (PL 105-277)	(a)	Annual Audit	--	--	--
Application	2	State Operations K-3 CSR Program	(a)	Annual Audit	--	--	--
Application	2	State Facilities K-3 CSR Program	(a)	Annual Audit	--	--	--
J-7CSR	2	State CSR Enrollment Report (P-2)	(a)	Annual Audit	Permanent	Permanent	--
J-9MH-A	2	Morgan-Hart Grade 9 CSR Enrollment Report	(a)	Annual Audit	--	--	--
C E T A (Replaced by JTPA)							
CETA VE-6a	2	Analytical statement of Project Cost Estimate	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-18	2	Authorized Signature Certification	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-13	1	CETA Purchased Property Inventory at Close of Project	Permanent	Permanent		4 Years	Permanent
CETA VE-19	2	Claim for Reimbursement for Individual Referral Training	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-10	2	Claim for Reimbursement for Projects	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-51	2	Class Size Program	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-17	2	Individual Referral Certification for Training	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-15	2	Intent to Provide Individual Referral Training	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-12	1	Inventory of Instructional Equipment	Permanent	Permanent		4 Years	Permanent
CETA VE-68	2	Major Equipment Request Lists	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-3	2	Non-Financial Agreement Programs Narrative	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-1	2	Non-Financial Agreement Signature Sheet	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-9	2	Notification: Start of Training	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-2	2	Program Planning and Budgeting Information Summaries Special Grant: Vocational Education	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-11	2	Project Agreement. Quarterly Progress Report	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-7	2	Project Application Operation Plan	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-4	2	Project Application to Provide Vocational Education Services (Financial Agreement)	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-16	2	Project Application to Provide Vocational Education Services for Individual Referrals	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-5	2	Project Application to Provide Vocational Education Services Plan of Services	4 Years	5 Years	Final State/Federal Audit	--	--
CONSOLIDATED APPLICATION							
CETA VE-14	2	Request of Inventory Adjustment	4 Years	5 Years	Final State/Federal Audit	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion
(a) - No Legal Requirements

State & Federal Special Projects/Programs...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
CONSOLIDATED APPLICATION ...continued							
CETA VE-53	2	Vocational Education Program Quality Review: Follow-up	4 Years	5 Years	Final State/Federal Audit	--	--
CETA VE-50	2	Vocational Education Program Quality Review Individual Referrals	4 Years	5 Years	Final State/Federal Audit	--	--
CFP-2 (CARM-15)	2	AFDC Report (School Level)	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Application for Exemplary Incentive Grant Funds: ECIA Chapter 2	4 Years	5 Years	Final State/Federal Audit	--	--
SDE-100	2	Application for Funding: Consolidated Categorical Aid Programs	4 Years	5 Years	Final State/Federal Audit	--	--
EIS-106	2	Budget Transfer Request ECIA Chapter 2	4 Years	5 Years	Final State/Federal Audit	--	--
EIS-105	2	Claim for Reimbursement ECIA Chapter 2	4 Years	5 Years	Final State/Federal Audit	--	--
SDE 100	2	Consolidated Application for (A-127D) Funds for Educational Programs	4 Years	5 Years	Final State/Federal Audit	--	--
A-127P,	2	Consolidated Evaluation Report. N & D Neglected and Delinquent Youth Programs	4 Years	5 Years	Final State/Federal Audit	--	--
R-30CP	2	Consolidated Program Participation Report -School Plan	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Distribution of AFDC Children by School District	4 Years	5 Years	Final State/Federal Audit	--	--
	2	District Master Plan for School Improvement (including school plans)	4 Years	5 Years	Final State/Federal Audit	--	--
	2	ECIA Chapter 1 Exemplary/Incentive Projects: Progress Report	4 Years	5 Years	Final State/Federal Audit	--	--
CARM-11/ dss-11	2	Equipment Removal Form	4 Years	5 Years	Final State/Federal Audit	--	--
EIS-104	2	Expenditure Report ECIA Chapter 2	4 Years	5 Years	Final State/Federal Audit	--	--
RSF-3	2	Report for Determining Final Payment Pursuant to Chapter 1 of PL 81-874	4 Years	5 Years	Final State/Federal Audit	--	--
4-001 thru 4-004	2	School Plan for Consolidated Programs	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Special Studies of the School Improvement Program	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Survey of Local Evaluation Reports for School Improvement Schools	4 Years	5 Years	Final State/Federal Audit	--	--
A-127W	2	Waiver Request	4 Years	5 Years	Final State/Federal Audit	--	--
DEMONSTRATION PROGRAMS							
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
	1	Final Financial Report	Permanent	Permanent		4 Years	Permanent
	2	Preliminary Fiscal Reports	4 Years	5 Years	Final State/Federal Audit	--	-
	2	Request for Amendment or Revision	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit		
DRIVER TRAINING							
J-22.2A	1	Driver Training Cost Data Report	Permanent	Permanent		4 Years	Permanent
J-22.2C	1	Report of Driver Training Vehicles or Simulators	Permanent	Permanent		4 Years	Permanent
J-22.2AW	3	Worksheet for Driver Training Cost Data Report	3 Years	4 Years	Fiscal Accountability	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion
(a) - No Legal Requirements

State & Federal Special Projects/Programs...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
DRIVER TRAINING ...continued							
J-22.28	1	Report of Replaced Driver Training Vehicles or Simulators Used Exclusively for Driver Training	Permanent	Permanent		4 Years	Permanent
GIFTED AND TALENTED PUPILS							
State Software (J-22-A)	1	Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Application for Gate Funding	4 Years	5 Years	Final State/Federal Audit	--	--
State Software (J-22-P1)	1	First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
	2	Program Participation Application for Gifted and Talented Pupils	4 Years	5 Years	Final State/Federal Audit	--	--
State Software (J-22-P2)	1	Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
State Software (J-22-A Supplement)	1	Supplement to Annual Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
State Software (J-22-P1 Supplement)	1	Supplement to First Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
State Software (J-22-P2)	1	Supplement to Second Period Report for Gifted and Talented Programs	Permanent	Permanent		4 Years	Permanent
HEAD START/STATE PRESCHOOL							
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
CD-8501	1	Attendance and Fiscal Report for State Preschool Program	Permanent	Permanent		4 Years	Permanent
	2	Budget Adjustment Request	4 Years	5 Years	Final State/Federal Audit	--	--
	2	District Invoice for Reimbursement (monthly)	4 Years	5 Years	Final State/Federal Audit	--	--
	2	District Invoice for Reimbursement (quarterly)	4 Years	5 Years	Final State/Federal Audit	--	--
CD-8200	1	Enrollment and Attendance Register for State Preschool Program	Permanent	Permanent		4 Years	Permanent
CD-8501	2	Fiscal Report for State Preschool Program	4 Years	5 Years	Final State/Federal Audit	--	--
CD-2921	2	Preschool Incentive Grant Application	4 Years	4 Years	--	--	--
	2	Refunding Application	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Request for Advance Approval	4 Years	5 Years	Final State/Federal Audit	-	-
CD-6506	2	Request for Revision of State Preschool Program Budget	4 Years	5 Years	Final State/Federal Audit	--	--
INDIAN EDUCATION							
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
	3	California Indian Education Center Evaluation	3 Years	4 Years	Timing/Fiscal Year	--	--
	2	Application for Allocated Federal Vocational Education F	4 Years	5 Years	Final State/Federal Audit	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

(a) - No Legal Requirements

State & Federal Special Projects/Programs...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
INDIAN EDUCATION ...continued							
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Capital Outlay Records	4 Years	5 Years	Final State/Federal Audit	--	--
AIE-1	1	SB2264 Final Expenditure Report	Permanent	Permanent		4 Years	Permanent
JOB TRAINING AND PARTNERSHIP ACT - JTPA							
	2	Claims/Invoices	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Compensation Records	4 Years	5 Years	Final State/Federal Audit	--	--
	2	JTPA Agreement/Signature Sheet	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Monthly Report of Matching and Inkind Contributions	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Payroll Records	4 Years	5 Years	Final State/Federal Audit	--	--
MIGRANT EDUCATION							
	2	Agreement to Provide Migrant Education Services	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Any Narrative Summaries	4 Years	5 Years	Final State/Federal Audit	--	--
CD-9602	2	Application for Child Development Services - Migrant and Federal Base - (English and Spanish)	4 Years	5 Years	Final State/Federal Audit	--	--
CD-9502	1	Attendance and Fiscal Report for Alternative Payment and Child Protective Service Program	Permanent	Permanent		4 Years	Permanent
CD-9500	1	Attendance and Fiscal Report for Child Development Programs	Permanent	Permanent		4 Years	Permanent
CD-9501	1	Attendance and Fiscal Report for County Welfare Departments	Permanent	Permanent		4 Years	Permanent
	2	Independent Evaluation of the Migrant Education Program	4 Years	5 Years	Final State/Federal Audit	--	--
CD-9603	3	Instructions for CD-9602	3 Years	4 Years	Timing/Fiscal Year	--	--
CD-9500-A	1	Migrant Specialized Services - Attendance and Fiscal Report for Child Development Programs	Permanent	Permanent		4 Years	Permanent
	2	Monthly Reports	4 Years	5 Years	Final State/Federal Audit	--	--
	2	Operating Agency Application	4 Years	5 Years	Final State/Federal Audit	--	--
MISCELLANEOUS							
PL 874	2	Application for School Assistance in Federally Affected Areas	4 Years	5 Years	Final State/Federal Audit	--	-
	2	Mentor Teacher Application	4 Years	5 Years	Final State/Federal Audit	--	--
	1	Mentor Teacher Program Financial Report	Permanent	Permanent		4 Years	Permanent
	1	Miscellaneous "One-Time-Only" Special Projects Report	Permanent	Permanent		4 Years	Permanent
	1	Program Application and Financial Report (Mentor Teacher)	Permanent	Permanent		4 Years	Permanent
A-127-D	1	Program Financial Report (Staff Development Projects)	Permanent	Permanent		4 Years	Permanent
VE-81 B	2	Adult Education Vocational Program Annual Enrollment Report Form	5 Years	6 Years	(A)	--	--
	2	Annual Accountability Report	5 Years	6 Years	(A)	--	--
J-141-ROC/P	1	Annual Report of ROC/P Transportation	Permanent	Permanent		4 Years	Permanent
VE-1,SDE-100, SDE-100A&B, SDE-101 A&B, SDE-103	2	Application for Allocated Federal Vocational Education Fund	5 Years	6 Years	(A)	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion

State & Federal Special Projects/Programs...continued

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
MISCELLANEOUS ...continued							
	2	Any Narrative Summaries	5 Years	6 Years	(A)	--	--
VE-50	2	Application of Annual Approval of Vocational Education Contracts	5 Years	6 Years	(A)	--	--
VE-74	2	Application for Approval to Establish and Operate Business, Commercial, Manufacturing or Construction Activities	5 Years	6 Years	(A)	--	--
VE-77	2	Application for ROC/ROP Course Approval	5 Years	6 Years	(A)	--	--
5VEA-1	2	Application for VEA Funds - Consumer and Homemaking Education - Basic Grant	5 Years	6 Years	(A)		--
5VEA-1	2	Application for VEA Funds -Consumer and Homemaking Education - Economically Depressed Area Program/Services	5 Years	6 Years	(A)	--	--
2VEA-1	2	Application for VEA Funds - Basic Grant	5 Years	6 Years	(A)	--	--
3VEA-1	2	Application for VEA Funds - Program	5 Years	6 Years	(A)	--	--
4VEA-1	2	Application for VEA Funds - Special Programs for the Disadvantaged	5 Years	6 Years	(A)	--	--
A1, A3, VE5	1	Claim for Reimbursement of Federal Vocational Education Funds	Permanent	Permanent		4 Years	Permanent
VEA-30	2	Combined Application for VEA Funds, Title IIA, Title IIB, Title IIIB; including Vocational Education Projected Program Inventory System	5 Years	6 Years	(A)	--	--
VE-77R	2	Course Revision Approval ROC/ROP	5 Years	6 Years	(A)	--	--
VE-45A	2	Enrollment in Vocational Education Programs, by Ethnic Classification	5 Years	6 Years	(A)	--	--
2VEA-3	2	Financial Report and Claim For Funds	5 Years	6 Years	(A)	--	--
3VEA-3	2	Financial Report and Claim For Funds	5 Years	6 Years	(A)	--	--
4VEA-3	2	Financial Report and Claim for Funds	5 Years	6 Years	(A)	--	--
5AVEA-3	2	Financial Report and Claim for Funds	5 Years	6 Years	(A)	--	--
5BVEA-3	2	Financial Report and Claim for Funds	5 Years	6 Years	(A)	--	--
VEA-4	2	Financial Report and Claim for Funds	5 Years	6 Years	(A)	--	--
VE-5	2	Claim Document	5 Years	6 Years	(A)	--	--
VE-45	2	Placement of Program Completion/ Leavers in Vocational Education Program	5 Years	6 Years	(A)	--	--
VE 56	2	Program Self-Assessment Questionnaire	5 Years	6 Years	(A)	--	--
VE-73	2	Report of Revenues Earned by Regional Occupation Centers and Programs	5 Years	6 Years	(A)	-	--
VOCATIONAL EDUCATION							
VE-80-B	2	ROC/P Annual Enrollment	5 Years	6 Years	(A)	--	--
	2	ROC/P Annual Follow-up of Program Completers	5 Years	6 Years	(A)	--	--
VE-80-A	2	ROC/P Annual Staff Report	5 Years	6 Years	(A)	--	--
VE-78	2	ROC/ROP Course Verification	5 Years	6 Years	(A)	--	--
	2	Student Data Forms for Vocational Education Follow-up of Programs, Completers/Leavers and Employers	5 Years	6 Years	(A)	--	--
	2	Supplemental Combined Application for Vocational Education Funds, Subparts 2,3,4,5	5 Years	6 Years	(A)	--	--
VEA-30	2	Vocational Education Projected Program Inventory System	5 Years	6 Years	(A)	--	--
VEA/SPEC-81	2	Vocational Education/Special Programs, Enrollment Collection	5 Years	6 Years	(A)	--	--
	1	Agenda/Minutes - Student Council Meetings	Permanent	Permanent		4 Years	Permanent
	1	Annual Financial Reports	Permanent	Permanent		4 Years	Permanent
	3	Bank Statements	3 Years	7 Years	For Audit Purposes	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records - - Feasibility to Microfilm at District Discretion

(a) - No Legal Requirements

Student Body Records

Form No. (If Any)	Class	Record Title	Required		Reason For Recommended Period	**If Imaged**	
			Hard Copy Retention	Recommended Retention		Hard Copy Retention	Media Retention
	1	Agenda/Minutes-Student Council Meetings	Permanent	Permanent		4 Years	Permanent
	1	Annual Financial Reports	Permanent	Permanent		4 Years	Permanent
	2	Bank Deposit Slips	4 Years	7 Years	For Audit Purposes	--	--
	3	Bank Statements	3 years	7 years	For Audit Purposes	--	--
	3	Cash Collection Reports	3 years	4 Years	Timing/Fiscal Year	--	--
	3	Cash Receipts/Disbursements Journals	3 years	Permanent	Fiscal Accountability	4 years	Permanent
	3	Canceled Checks & Bank Reconciliation	3 years	7 years	For Audit Purposes	--	--
	3	Corresponding Ledgers (i.e. General Ledgers)	3 years	Permanent	Fiscal Accountability	4 Years	Permanent
	3	Invoices from Vendors	3 years	4 years	Timing/Fiscal Year	--	--
	3	Purchase Orders	3 years	4 years	Timing/Fiscal Year	--	--
	3	Receipts	3 years	7 years	For Audit Purposes	--	--
	3	State, Local Sales & Use Tax Return	3 years	4 years	Timing/Fiscal Year	--	--
	3	Stores Inventory Listing	3 years	4 Years	Timing/Fiscal Year	--	--
Class 1 -Permanent Records			Class 2 -Optional Records		Class 3 -Disposable Records		-- Feasibility to Microfilm at District Discretion

Transportation Records

Form No. (If Any)	Class	Record Title	Required			**If Imaged**	
			Hard Copy Retention	Recommended Retention	Reason For Recommended Period	Hard Copy Retention	Media Retention
J-141	1	Annual Report of Pupil Transportation Expenses	Permanent	Permanent		4 Years	Permanent
J-141-ROC/P	1	Annual Report of ROC/P Transportation	Permanent	Permanent		4 Years	Permanent
	3	Bus Drivers Daily Report	3 Years	4 Years	Timing/Fiscal Year	--	--
	2	Bus Drivers Training Records	4 Years	4 Years	--	--	--
DL 170	1	Certificate of Driving Experience/Training (DMV Form)	Permanent	Permanent	--	4 Years	Permanent
J-67	1	Certification of Total Income, Attendance, and Transportation for Development Centers for Handicapped Pupils	Permanent	Permanent		4 Years	Permanent
	3	Daily Fuel and Oil Report	3 Years	3 Years	--	--	--
	(a)	Daily Vehicle Inspection Report (Bus Drivers)	1 Month	1 Month	--	--	--
	(b)	Inspection, Maintenance, Lubrication and Repair Records	1 Year	1 Year	--	--	--
DL51	(a)	Medical Examination Report (DMV Report) (Bus Drivers)	1 Year	4 Years	Driver's License 4 Year Life	--	--
	3	Monthly Record of Bus Days	3 Years	4 Years	Timing/Fiscal Year	--	--
	1	Motor Vehicle Accident Report	Permanent	Permanent		4 Years	Permanent
	(a)	Preventive Maintenance Report	1 Year	1 Year	--	--	--
J-142	1	Report of Replaced School Busses	Permanent	Permanent		4 Years	Permanent
J-143	1	Report of School Buses Purchased	Permanent	Permanent		4 Years	Permanent
	(c)	Request For Special Trips Reports	0 Years	3 Years	Back-up-Amended	--	--
	(c)	Routing Schedules	0 Years	1 Year	Routing History	--	--
	3	School Bus Pupil Count (Quarterly)	3 Years	4 Years	Timing/Fiscal Year	--	--
	3	School Bus Schedule and Load Report	3 Years	4 Years	Timing/Fiscal Year	--	--
J-141-S	1	Special Education Transportation Data Report	Permanent	Permanent		4 Years	Permanent
J-141-T	1	Transfer of Transportation Services	Permanent	Permanent		4 Years	Permanent
J-141-CW-2	1	Worksheet for a Cooperative Pupil Transportation System	Permanent	Permanent	Only Report Filed	4 Years	Permanent
J-141-DEP	3	Worksheet for Compiling Data for Computing Depredation on District-Owned School Buses Used for Transportation Out-of-State or Community Recreation	3 Years	Permanent	Report is Class 1 (7 Yr. Statute of Limitations)	--	--
J-141-CW-1	3	Worksheet for Cost Data for a Cooperative Pupil Transportation System	3 Years	Permanent	Report is Class 1 (7 Yr. Statute of Limitations)	--	--
J-1414	3	Worksheet for Cost Data Report for a Single District Pupil Transportation System	3 Years	Permanent	Report is Class 1 (7 Yr. Statute of Limitations)	--	--
J-141-SW	3	Worksheet for Special Education Pupil Transportation Data Report	3 Years	Permanent	Report is Class 1 (7 Yr. Statute of Limitations)	--	--

Class 1 -Permanent Records Class 2 -Optional Records Class 3 -Disposable Records -- Feasibility to Microfilm at District Discretion
 (a) - Highway Patrol Handbook
 (b) - Administration of Public School Transportation -1972
 (c) - Internal Working Papers