

FILE: DIE

RECORDS RETENTION

The Jefferson Davis Parish School Board shall exercise diligence and care in preserving all records used or retained for use in the operation and management of the school district, including, but not limited to, financial records, supporting documents, statistical records and all other records pertinent to accounting and reporting for sources and uses of funds. Records shall be retained in accordance with a *Records Retention Schedule* developed by the Superintendent or his/her designee and approved by the State Archivist.

RECORDS RETENTION SCHEDULE	3 Years	6 Years	Permanent
Accounts payable and receivable		U	
Annual budget reports		U	
Auto/mileage reports/Travel expense		U	
Bank statements/Cancelled checks		U	
Correspondence (regular and e-mail):			
<i>general or routine</i>	U		
<i>legal and important matters</i>			U
Deeds, mortgages, and bills of sale			U
Deposit receipts		U	
Financial audit reports		U	
Financial statements		U	
Fixed assets/Inventory records		U	
Insurance policies (expired)	U		
Insurance policies (current)			U
Patient records		U	
Payroll records and summaries		U	
Personnel files (after separation)		U	
Property records			U
Purchase orders		U	
State/Local contracts		U	

Tax returns and related documents			U
Time sheets	U		

Other time restrictions may apply to certain records.

A microphotographic process or other legal form of archival recordkeeping may be utilized and the resulting microform retained for storage in lieu of the original itself unless specifically prohibited by law.

Records should not be destroyed when there is pending litigation or until the appropriate state or federal audits have been conducted. The disposal of public records in any school shall be supervised by the principal and a record made of the disposal, including the disposal date and names of those observing the disposal.

Any off-site storage of records or official documentation shall be properly labeled for easy reference, and protected for security.

New policy: June 15, 2017

Ref: La. Rev. Stat. Ann. §§[17:196](#), [39:1597](#), [39:1598](#), [39:1626](#), [39:1627](#), [44:36](#), [44:411](#)  
Board minutes, [6-15-17](#)

Jefferson Davis Parish School Board