

RECORDS RETENTION

Chapters 119 and 257, F.S., provide that no public official may mutilate, destroy, sell, loan or otherwise dispose of any public record unless under the consent of the records and information management program of the Division of Library and Information Services of the Department of State. Provided applicable audits have been released, records may be disposed of in accordance with procedures established by the records and information management program. Examples of such records for internal funds include check requisitions and documentation, canceled checks, recap of collections, journals, ledgers, financial reports, purchase orders and serialized forms.

Disposal of Records

Upon receipt of the records after audit by the internal or external auditors, audit record containers are to be marked denoting the fiscal period involved. The basic retention time period for such records are:

Canceled checks are to be retained for five (5) years or until the final audit report has been issued, whichever is greater.

All other records are to be retained for three (3) years or until the final audit report has been issued, whichever is greater.

It is recommended that a file be maintained by the Principal/Director for published audits for at least five (5) years.

Records Management Program

Objective

The main objective of our Records Management Program is to establish a uniform District-wide system. In compliance with this responsibility, Records Retention Schedules have been established determining the length of time each records series is to be kept in accordance with state law. These retention schedules are established by the Department of State. They are updated in the General Records Schedule for Florida School Districts and the contents are included in the Records Retention Manual.

A record series is a group of identical or related records which are normally used and filed as a unit and are destroyed as a unit in accordance with a retention schedule. A retention schedule is a list of such records for a department, area, office or school specifying the length of time records are to be kept and when such records may be destroyed.

Please note: A RETENTION SCHEDULE DOES NOT AUTHORIZE THE DESTRUCTION OF ANY RECORDS. Destruction may not occur until a Records Destruction Request has been submitted by the Records Management Center to the state Division of Library and Information Services and approval has been received.

When a school or department has records it wishes to destroy, a Records Disposition Document form should be completed and forwarded to Records Management via Fax, email, or Inter-Office mail. The Records Disposition form can be found in the forms library on the Leon County Schools website.

The person initiating the Records Disposition Document should ensure that the form is completed in its entirety prior to forwarding to Records Management for approval. The Records Retention Manual should be referenced to ensure that records are being destroyed in accordance with the specified timeframe. Sections a. (schedule number); b. (Item number) and d. (retention period) of the Records Disposition document should be completed using the appropriate information found in the Records Retention Manual.

After approval has been received from Records Management, section g. of the Records Disposition Document should be updated to include the disposition action and date. The document should then be certified for destruction (section 7), signed by a witness and filed as a part of the schools internal accounts records. A copy of the certified form should also be forwarded to Records Management. The school or department should contract with the vendor of their choice to destroy the records.

Once materials containing personally identifiable information have been approved for destruction, the original materials should be shredded as the means of destruction.

NOTE: It is the responsibility of the principal or other administrator to assure that records destroyed are those which have been approved for destruction.

Any request for assistance in the maintenance and disposition of records should be made to:

RECORDS MANAGEMENT CENTER
520 SOUTH APPELYARD DRIVE
TALLAHASSEE, FL 32304
(904) 487-7530