



Atlanta Public Schools Records Retention Schedule

The Atlanta Public Schools Retention Schedule provides descriptions of all APS records and the legal retention requirement associated with each record. All retention schedules stated in this schedule are legally required retention periods for which the records shall be maintained under normal business conditions by the Atlanta Public Schools.

Atlanta Public Schools Retention Schedule

ACCOUNTING

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Accounts Payable Files	Records documenting payments made by agency for services rendered or items purchased	5 years	O.C.G.A. 11-2-725; 36-11-1	Temporary - Short Term	Vital Record - duplicate and store offsite
Accounts Receivable Files	Records documenting monies owed to and collected by the agency	5 years	O.C.G.A. 11-2-725	Temporary - Short Term	Vital Record - duplicate and store offsite
Annual Financial Statements	Annual reports of the accounts, income and liabilities of an agency	Permanent		Permanent	Vital Record - duplicate and store offsite
Bank Loan Records	Include outstanding financial obligations incurred by an agency in the form of bank loans	5 years after settlement of loan		Temporary - Short Term	
Bank Statements	Periodic computations of deposits and credits to a bank account	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	Vital Record - duplicate and store offsite
Bids and Competitive Selection Records	Records documenting quotes by vendors to supply products or services to an agency	Capital Improvement Projects: 11 years All Other Records: 7 years	O.C.G.A. 9-3-24; 9-3-51; 11-2-725	Temporary - Short Term	
Cancelled Checks, Vouchers, and EFTs	Copies (or originals) of paid warrants	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	
Capital Improvement Bonds, Retired	Document the repayment of funds raised through bond issues	5 years		Temporary - Short Term	
Cash Balances and Reconciliations	Records documenting cash balances, receipts and disbursements completed during the day	5 years		Temporary - Short Term	

ACCOUNTING

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Collection Records	Records documenting an agency's efforts to collect unpaid accounts. Includes Lawson collection reports	5 years after account paid in full or deemed uncollectible	O.C.G.A. 9-3-25	Temporary - Short Term	Vital Record - duplicate and store offsite
Contracts and Agreements	Records documenting services and products provided to an agency for a specified cost and period of time	Capital Improvement Projects: 10 years after expiration. Other Contracts: 7 years after expiration	O.C.G.A. 9-3-24; 9-3-26	Temporary - Short Term	Vital Record - duplicate and store offsite
Contracts, Employee	Service contracts between an individual and government agency	7 years after expiration		Temporary - Short Term	Vital Record - duplicate and store offsite
Cost Accounting Reports	Financial reports by cost center of all expenditures	3 years		Temporary - Short Term	
Credit Card Administration Records	Records documenting administration of credit cards issued to individual staff or offices	7 years	O.C.G.A. 9-3-25	Temporary - Short Term	
Deposit Slips and Reconciliations	Documents recording transaction in a bank account	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	
Federal and State Grant Project Files - Non-Education Agencies	Records document federally and state funded projects	3 years after submission of final financial report	Uniform Administrative Requirements for Grants and Cooperative Agreements Between State and Local Governments (Common Rule)	Temporary - Short Term	
Federal and State Grant Project Files, Education Agencies	Records documenting grants to school systems from federal and state agencies	3 years after submission of final report or denial of application	34 CFR 74.53(b)	Temporary - Short Term	
Federal Revenue Sharing Records	Records documenting federal, state, county and municipal revenue-sharing; includes summaries, expenditures, and investments	5 years after submission of final report		Temporary - Short Term	

ACCOUNTING

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Franchise Records	Records documenting franchises granted to utility companies or other organizations allowing them to provide services to local residents	Permanent		Permanent	
General Ledger and Trial Balances	Record of final entry for all financial transactions	7 years	O.C.G.A. 9-3-25	Temporary - Short Term	Vital Record - duplicate and store offsite
Investment Records	Records documenting the savings and investments of funds by an agency	7 years		Temporary - Short Term	
Invoices	Records requesting payment for goods and services provided to an agency	5 years	O.C.G.A. 11-2-725	Temporary - Short Term	
Journal Entries (Journal Vouchers)	Adjustments to financial accounts	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	Vital Record - duplicate and store offsite
Journals and Registers	Financial logs recording detailed transactions, encumbrances, and obligations of an agency	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	
Moving Expenses	Records documenting a new employee's moving and travel expenses paid by the agency	5 years	O.C.G.A. 9-3-26	Temporary - Short Term	
Official Bonds and Oaths	Bonds required of local officials and custodians of funds	6 years after date of action	O.C.G.A. 45-8-9	Temporary - Short Term	Vital Record - duplicate and store offsite
Outstanding Obligations	Documents the unpaid accounts of an agency	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	Vital Record - duplicate and store offsite
Payment Schedules	Schedules of the deferred payment of goods, equipment and services	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	Vital Record - duplicate and store offsite
Professional Membership Records	Records documenting agency-paid individual memberships and activities in professional organizations	5 years	O.C.G.A. 9-3-26	Temporary - Short Term	
Receipts	Documentation of monies collected	5 years	O.C.G.A. 11-2-201; 11-2-725	Temporary - Short Term	Vital Record - duplicate and store offsite

ACCOUNTING

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Reconciliations	Periodic reconciliations of accounts within operating and general ledgers	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	
Refund/Disbursement Requests	Records documenting requests and disbursements made for overpayment of funds	4 years	O.C.G.A. 9-3-25; 11-2-725	Temporary - Short Term	Vital Record - duplicate and store offsite
Returned Checks	Records documenting attempts to collect monies for non-negotiable (usually insufficient funds) checks received for payment to agency accounts	5 years	O.C.G.A. 11-2-725	Temporary - Short Term	
Signature Authorizations	Records documenting the certification of employees who are authorized to sign fiscal and contractual documents	7 years after authorization expires	O.C.G.A. 9-3-24	Temporary - Short Term	Vital Record - duplicate and store offsite
Travel - Registration Fee Payments	Records documenting payment of registration fees which are not considered travel expenses	4 years		Temporary - Short Term	
Travel Authorization and Reimbursement Records	Records documenting requests for authorization from supervisors to travel on official business and related material, such as reimbursement of expenses and itineraries	3 years		Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

TEMPORARY-SHORT TERM Information that needs to be retained less than fifteen years.

TEMPORARY-LONG TERM Information that needs to be retained for fifteen years or longer, but which does not need to be retained permanently.

PERMANENT Information that for legal, historical, fiscal, or administrative reasons needs to be retained forever.

Atlanta Public Schools Retention Schedule

ADMINISTRATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Accident Reports	Reports of accidents involving district-owned vehicles	7 years	O.C.G.A. 9-3-33	Temporary - Short Term	
Annexations	Records documenting the approved additions of property to the city boundaries	Permanent	O.C.G.A. 36-36-3 (e)	Permanent	Vital Record - duplicate and store offsite
Annual and Ad Hoc Narrative Reports	Annual and ad hoc narrative reports that describe agency functions and activities	Permanent. Retain 1 copy. Destroy all others when no longer useful.		Permanent	
District Charter	Includes the constitution and by-laws of an incorporated city	Permanent		Permanent	Vital Record - duplicate and store offsite
Code Violations	Any violations of the Code of Ordinances pertaining to property	3 years		Temporary - Short Term	
Correspondence, Fiscal	Records documenting purchases, issuance of fiscal policy, or obligations and revenues	5 years	O.C.G.A. 9-3-25; 11-2-725	Temporary - Short Term	
Correspondence, General	Correspondence related to day-to-day operations of the office	5 years	O.C.G.A. 9-3-25	Temporary - Short Term	
Crisis or Disaster Records	Records documenting events and damages to agency property due to storms, riots, fires, drought, floods, and other acts affecting the citizens or agency facilities; may include photos, logs, reports, notes, and correspondence	5 years	O.C.G.A. 9-3-32	Temporary - Short Term	
Daily Broadcast Logs	Records documenting agency daily broadcast activities via radio or television	2 years	47 CFR 73.1840	Temporary - Short Term	
Daily/Monthly Activity Reports	Record of daily/monthly activities	2 years		Temporary - Short Term	

ADMINISTRATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
DCA Mandated Surveys	Surveys required by the Department of Community Affairs; includes, but is not limited to: Solid Waste Management Survey and Full Cost Report, Report of Local Government Finances, Independent Authority Bonded Indebtedness Form, Wage and Salary Survey, and Government Management Indicators Survey	5 years		Temporary - Short	
Deeds and Condo Plats	Records documenting individual ownership or property that are filed with the local government	Permanent		Permanent	Vital Record - duplicate and store offsite
Deeds, Right-of-Way	Records authorizing use of land for road widening or public works	Permanent		Permanent	Vital Record - duplicate and store offsite
Deeds, Security	Deeds to properties on which an agency holds the second mortgage	5 years after final payment		Temporary - Long Term	Vital Record - duplicate and store offsite
Easements	Records documenting the granting of access by a property owner to a local government to run wiring, water or sewage pipes, and other public works (or other reasons)	Permanent		Permanent	Vital Record - duplicate and store offsite
e-Certified Mail and Return Receipts	Technology implemented to replace the "Green Card" certified mail receipts.	6 years		Temporary-Short Term	Note: system will store receipts for 7 years
Emergency Preparedness Plans, Superseded	Business recovery plans for man-made and natural disasters	5 years	O.C.G.A. 9-3-32	Temporary - Short Term	Vital Record - duplicate and store offsite
Emergency Relief Records	Records documenting eligibility for financial assistance following a natural or other type of disaster	Permanent		Permanent	Vital Record - duplicate and store offsite
Federal and State Grant Final Reports	Final narrative summary submitted according to requirements of the funding agency	Permanent	Uniform Administrative Requirements for Grants and Cooperative Agreements Between State and Local	Permanent	

ADMINISTRATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Historic Preservation Files	Records documenting preservation of local landmarks and buildings	Permanent		Permanent	
Maps and Plats, Copies	Copies of maps and plats used for reference purposes	Retain for useful life		Transitory	
Maps, Plats, and Drawings	Records documenting the location of roads, subdivisions, water and sewage lines	Permanent		Permanent	Vital Record - duplicate and store offsite
Meeting Notices	Official notification of the time and place of regular and special meetings	5 years		Temporary - Short Term	
Minutes and Agendas	Official record of agency meetings and the decisions made	Permanent	O.C.G.A. 36-1-25	Permanent	Vital Record - duplicate and store offsite
Open Records Act Requests and Correspondence	Inquiries from members of the public requesting access to information under the Georgia Open Records Act (O.C.G.A. 50-18-70 et.seq.)	5 years		Temporary - Short Term	
Petitions	Signatures of local residents requesting action by an agency on a specific issue	5 years and resolution of issue		Temporary - Short Term	
Photographs	Aerial and other photographs of county property and functions	Permanent		Permanent	
Policies and Procedures	Standard operating practice for business processes	Permanent. Retain 1 copy		Permanent	Vital Record - duplicate and store offsite
Printing Service Files	Includes printing requests, cost estimates, mock-ups, proofs, and printing plates	1 year after superseded		Temporary - Short Term	
Publications	Newsletters, handbooks, pamphlets, and brochures published by the agency	Permanent. Retain 1 copy		Permanent	
Relocation Assistance Files	Records documenting financial assistance to individuals searching for new homes under the Community Development Program	5 years		Temporary - Short Term	

ADMINISTRATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Reports, Periodic	Quarterly and other narrative reports (not annual) that describe agency functions and activities	3 years		Temporary - Short Term	
Resolutions and Ordinances	Local laws and actions adopted by the board of education	Permanent		Permanent	Vital Record - duplicate and store offsite
Right-of-Way Agreements	Agreements with property owners specifying the terms of access to property for public works purposes	Permanent		Permanent	Vital Record - duplicate and store offsite
Speeches	Records relating to public speaking engagements of local officials	Permanent		Permanent	
Visitors Logs and Sign-In Sheets	Consists of sign-in forms or sheets generally located at an agency's reception desk to document visitors to the facility	2 years		Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

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ADMINISTRATIVE SUPPORT

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Blank Forms and Duplicates	Extra copies of blank forms and duplicates of reports or other materials that are no longer needed	Retain for useful life		Transitory	
Calendars	Desk calendars and other scheduling media; does not include court calendars	Retain for useful life		Transitory	
Certified Mail Logs	Receipt books containing record of certified mail sent out	Retain for useful life		Transitory	
Data Input Forms	Any type of forms used to collect information for input into electronic form	Destroy upon verification/audit of data entry		Temporary - Short Term	
Email Messages	Text documents which are created, stored, and delivered in an electronic format; email is a communication tool, equivalent to paper, microfilm, etc. in status; retention of email is decided by the CONTENT not format of the record	Transitory; Administrative Support; or Policy and Program			
Emails, Administrative Support	Messages of a facilitative nature created or received in the course of administering programs; examples - correspondence, daily/weekly activity reports, appointments	Identify functional content (financial, administrative, etc.) and consult relevant common schedules		Temporary - Short Term	
Emails, Policy and Program	Messages documenting the formulation and adoption of policies and procedures and the management of agency programs or functions; examples - case file management, constituent correspondence, periodic reports, budget documents	Identify functional content (financial, administrative, etc.) and consult relevant common schedules		Temporary - Long Term	

ADMINISTRATIVE SUPPORT

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Emails, Transitory	Messages of short-term interest with no documentary or evidential value; examples - routine requests for publications; transmittal letters; agency event notices (holidays, parties, charitable campaigns)	Retain for useful life		Transitory	
Indexes	Provide a ready reference or pointer into larger sets of records	Retain until destruction of indexed set of records		Temporary - Short Term	Vital Record - duplicate and store offsite
Mailing Lists	Various standard lists of names and addresses	Retain for useful life		Transitory	
News Clippings and Scrapbooks	Copies of news articles and photos maintained by the agency as a historical record of activities	Newspaper Clippings: Retain for useful life Scrapbooks: Permanent		Permanent	
Reference Files	Copies of records, publications, and other materials used to answer routine inquiries and questions	Retain for useful life		Transitory	
Telephone and Fax Machine Contact Logs	Lists of telephone and fax machine contacts and related data	Retain for useful life		Transitory	
Telephone Return Message Records	"While You Were Out" message slips and related data	Retain for useful life		Transitory	

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Atlanta Public Schools Retention Schedule

AUDITS

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Audit Reports	Reports prepared by external auditors examining and verifying the agency's financial activities for a defined period of time	Permanent		Permanent	Vital Record - duplicate and store offsite
Employee Investigative Complaint Case Files, Resolved	Resolution of workplace investigations to mitigate cases of fraud, waste or abuse	6 years		Temporary-Short Term	Independent of the District
Internal Auditing Records	Records documenting the conduct of an internal review of agency financial accounts and processes	5 years or two successive audits, whichever is greater		Temporary - Short Term	

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Atlanta Public Schools Retention Schedule

BUDGETING

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Budget Maintenance Records	Records documenting changes made in the agency's initial budget including change requests, request authorizations, funds transfers, and other records	6 years		Temporary - Short Term	
Budget Reports	Reports documenting the status of an agency's budget	6 years		Temporary - Short Term	Vital Record - duplicate and store offsite (latest copy)
Budget Request Records	Records documenting the preparation of a budget request package and reporting of the status of funds, requesting amendments of allotments, and reporting program performance	5 years after the end of the fiscal year		Temporary - Short Term	
Cooperative Federal Programs Budget Preparation, Project, and Allocation Records	Records used to develop, estimate, propose, and plan preliminary budget requests for cooperative state/federal programs and reflects the process by which annual budget allotments are distributed	5 years after the end of the fiscal year		Temporary - Short Term	
Final Budgets	Includes the final approved budget for an agency	Permanent; Retain 1 copy		Permanent	Vital Record - duplicate and store offsite (latest copy)

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

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Atlanta Public Schools Retention Schedule

FACILITIES

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Blueprints and Specifications, As-Built	Plans and specifications submitted by contractors when applying for building permits	Retain for life of structure		Temporary - Long Term	
Blueprints and Specifications, Interim and Never Constructed	Plans and specifications submitted by contractors when applying for building permits; these buildings were never constructed or plans were altered prior to construction	7 years	O.C.G.A. 9-3-24	Temporary - Short Term	
Building Codes	Published code books containing building standards	Permanent		Permanent	
Certificates of Occupancy	Records documenting compliance with minimum standards required by the safety fire laws	10 years		Temporary - Short Term	
Demolition Records	Records relating to the demolition and clearance of buildings deemed unfit for habitation	5 years		Temporary - Short Term	
Rehabilitation Applications, Inactive	Applications from owners of substandard property for financial assistance to improve property	5 years		Temporary - Short Term	
Sewage Disposal System Inspection Reports	Records documenting the inspection of building sewage systems for compliance with building codes	2 years		Temporary - Short Term	
Street Address Lists	Listings of streets and house numbers	Retain for useful life		Transitory	Vital Record - duplicate and store offsite

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

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Atlanta Public Schools Retention Schedule

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Accident Reports, Student or Visitor	Reports and investigations of injuries occurring on the school campus	5 years	O.C.G.A. 9-3-33	Temporary - Short Term	
Adult and Community Education Program Course Offerings	Lists of courses offered for each term	Permanent. Retain 1 copy		Permanent	
After-School Program Daily Records	Non-financial school records documenting daily attendance and activities of the after school program, such as attendance, late pick up, etc.	Retain for useful life		Temporary - Short Term	
Annual Reports, Driver Education	Annual reports to the state on the number of students and teachers participating in driver's ed programs	3 years		Temporary - Short Term	
Attendance Records for Home-Schooled Students	Records documenting required hours of study for home-schooled students	Retain until student reaches age 18		Temporary - Long Term	
Behavior Policy/Code of Conduct Records	Copies of written school policy of student behavior, signed annually for each student by parent or guardian	1 year		Temporary - Short Term	
Certificates of Eligibility - Migrant Education Agency	Documents relating to the eligibility of migrant families to participate in the migrant education program	6 years	O.C.G.A. 20-2-189	Temporary - Short Term	Vital Record - duplicate and store offsite
Civil Rights Reports	Records of statistical analyses of student gender, race, and ethnicity	Final Report: Permanent All other records: 3 years	34 C.F.R. 74.53, 34 C.F.R. 80.42, 34 C.F.R. 100.6	Permanent	Other records: 3 years, except when there is an audit, inspection, review or investigation, in which case the records must be retained for 3 years or until the matter involving those records is resolved, whichever is longer

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Class Rolls	Lists of students in each class	3 years		Temporary - Short Term	
Clinic Activity Information	Documents the disbursing of medication and clinic visits by students	3 years	O.C.G.A. 9-3-33	Temporary - Short Term	
Completed and Graded Student Work, Not Returned to Student	Tests and other school assignments not returned to the student	Retain until end of school year		Temporary - Short Term	
Court-ordered Busing Plans and Maps	Overall plans designating which neighborhoods are served by each school in the system and indicating bus routes, that were created originally in response to a court order	Permanent		Permanent	
Curriculum Course Guides	Handbook documenting the content, objectives, and evaluation criteria for all school courses	Permanent. Retain 1 copy		Permanent	
Declarations of Intent, Home School	Notices by parent or guardian that a child will participate in a home study program	5 years		Temporary - Short Term	
Department and Program Operational Records	Documentation of day-to-day operations of a department or program, including correspondence and reports	5 years		Temporary - Short Term	
Dropout Reports	Reports generated to document students who cease attending school	5 years		Temporary - Short Term	
Emergency Contact Cards	Record of individuals to be notified in event of student accident or illness	Retain for useful life`		Temporary - Short Term	
Emergency/Fire Drill Reports	Documentation of all fire drills held in each school	3 years		Temporary - Short Term	
Enrollment Records - Student Did Not Attend	Records relating to students accepted for enrollment who did not attend school	1 year		Temporary - Short Term	
Federally-Affected Areas Membership Counts	Reports of numbers of students whose parents reside or are employed on federal property	5 years		Temporary - Short Term	
Field Trip Authorizations/Parental Permissions	Authorization of parent for student to participate in an off-campus school activity	Retain until end of school year		Temporary - Short Term	

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Georgia High School Association Files	Documents school participation in the state high school association	5 years		Temporary - Short Term	
Gifted and Talented Program Selection and Placement Requirements Documentation	Core documentation about the admission criteria and program requirements	Permanent. Retain 1 copy		Permanent	
Grade Distribution and Failure Reports	Statistical analysis of student grades and attendance	3 years		Temporary - Short Term	
Grade Reports	Reports of individual test scores and average course grade	1 year after date distributed	AACRAO Schedule C	Temporary - Short Term	
Graduate, Withdrawal and Class Ranking Lists	Listings of graduates, withdrawals and rankings in class	Permanent		Permanent	
Honor Rolls	Listing of students placed on various honor rolls for academic achievement	Grades K-8: 2 years. Grades 9-12: 5 years		Temporary - Short Term	
Investigations Files	Records documenting investigations involving teacher, parents, and/or students	7 years	O.C.G.A. 17-3-1(c)	Temporary-Short Term	
Learning Resources Services (GLRS) Files	Records documenting programs for the handicapped through the Georgia Learning Resources Services	5 years		Temporary - Short Term	
Limited English Proficient (LEP) Student Records	Records documenting efforts to increase the English language proficiency of students. Program is also known as English for Speakers of Other Languages (ESOL)	5 years		Temporary - Short Term	
Outstanding Achievement Awards	Awards to schools, teachers, or professional staff for outstanding achievement	5 years		Temporary - Short Term	
Private School Enrollments	Reports submitted to the state about enrollments in private schools	Permanent		Permanent	
Private Tutor Records	Teaching certificates and other required documentation for individuals who "home school" students	5 years after instruction ends		Temporary - Short Term	
Reports to State Department of Education	Report of statistical information to the state	Annual reports: 10 years; Periodic: 5 years		Temporary - Long Term	

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Requests for Transcripts	Records documenting requests from former students for copies of their records	1 year		Temporary - Short Term	
Requests to Use School Bus	Requests by individual schools to use a school system bus and driver for a special trip	3 years		Temporary - Short Term	
Safe and Drug-Free Schools Records	Records documenting the activities and initiatives sponsored by this federally-funded program	3 years		Temporary - Short Term	
Scholarships and Awards	Documents the selection of outstanding students to receive scholarships	5 years		Temporary - Short Term	
School Bus Drivers Physical Exams	Certification of bus drivers for satisfactory physical condition	2 years or until replaced with new certificate		Temporary - Short Term	
School Bus Schedules	Information about schedules, timing, and distance for individual buses	1 year or until superseded		Temporary - Short Term	
School Censuses	Compilation of numbers of school age children	2008 and Prior: Permanent. Post-2008: Retain for useful life		Permanent	Post-2008 Census information included in Annual Reports to DOE
School Construction Project Files	Records documenting all activities pertaining to planning and construction of educational facilities	Retain for life of facility		Temporary - Long Term	
School History Records and Objects	Scrapbooks, newspaper articles, photographs, and artifacts that document the development of the school system	Permanent		Permanent	
School Psychologist/Psychometrist Files	Records, such as student evaluations, created by the school system psychologist or psychometrist	5 years		Temporary - Short Term	
School Social Worker Reports	Statistical reports of caseload to the state	Annual Reports: 15 years. Periodic Reports: 3 years		Temporary - Long Term	
School System Re-zoning Records	Documents relating to the revision of student attendance zones to maximize the use of school facilities	Approved Plan: Permanent; All other records: 3 years		Permanent	

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
School System Studies and Reports	Studies of the conditions and funding levels in the school system	Permanent		Permanent	
Southern Association of Colleges and Schools (SACS) Applications for Accreditation	Applications for and certificates of accreditation by SACS	Accreditation Certificate: Permanent Applications: 5 years	Southern Association of Colleges and Schools Accreditation Guidelines; O.C.G.A. 20-2-20; 20-3-411	Permanent	Vital Record - duplicate and store offsite
Southern Association of Colleges and Schools (SACS) Self Study Reports	Accreditation review and maintenance records	Final Report: Permanent All other records: Retain until completion of report		Permanent	
Special Education Program Selection and Placement Requirements Documentation	Core documentation of admission criteria and program requirements	Permanent; Retain 1 copy		Permanent	Vital Record - duplicate and store offsite
Standardized Test Results	Records documenting the administration and results of state required standardized student testing programs	4 years		Temporary - Short Term	
Standardized Test Summary Reports	Records documenting state required standardized student test summaries showing overall school or system results	10 years		Temporary- Short Term	
Stipends	Records documenting the expenditure of funds awarded to certified personnel, paraprofessionals, and aides for the successful completion of education opportunities	7 years	O.C.G.A. 9-3-24	Temporary-Short Term	
Student Activities History Files	Documentation of student clubs and organizations, events, publications, contests, and competitions	Permanent		Permanent	
Student Counseling Test Records	Teacher counseling records for individual students	Retain for useful life		Transitory	
Student Discipline and Suspension Records, Resolved	Records of disciplinary action of problem students	7 years or until age 22, whichever is shorter		Temporary - Short Term	
Student Due Process Disciplinary Hearings Files	Documentation of evidence, transcripts, and decisions based on due process hearings	15 years or until age 22, whichever is shorter		Temporary - Long Term	

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Student Education and Health Records - Migrant Education Agency	Documents relating to the educational progress and health status of migrant students	Retain until records received from local school system		Transitory	
Student Excuses	Communications from a student's parent or guardian indicating the reason for the student's absence	Retain until end of school year		Temporary - Short Term	
Student Health Management Plans	Information documenting prescribed medicines and medical conditions of individual students	2 years after graduation or date of last attendance		Temporary-Short Term	
Student Records, District Created	Official record of the individual student for his/her period of enrollment at a school; includes attendance reports, transcripts, standardized test scores (CRCT, GHST, etc.)	Permanent		Permanent	Vital Record - duplicate and store offsite
Student Records, Personal and Non-District Created	Records only required or presented to the school district while the student is enrolled and those not created by the school district; including birth certificates, immunizations, medical, legal and optional testing (ACT,SAT, etc) records	Give to student/parent at graduation or at time of withdrawal	Permanent	Permanent	Vital Record - duplicate and store offsite
Student Records, Special Education	Individual student records for the special ed program; parents must be notified when information is no longer needed to provide services to the child; all information but student permanent record must be destroyed on request of parent	Retain until age 22 and notification of parents	34 CFR 300.624	Temporary - Long Term	
Student Remediation Files	Records documenting assistance, instruction, and remediation provided to students who fail to pass the high school graduation exam	4 years after graduation or last attempt to complete		Temporary - Long Term	
Student Requests for Early Release from School	Requests for early release from school for work or travel purposes	Retain until end of school year		Temporary - Short Term	
Student Sign-In/ Sign-Out Sheets	Records documenting students leaving campus for work, lunch or other purposes	Retain until end of school year		Temporary - Short Term	

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Student Support Team (SST) Files	Records supporting the identification and recommended modifications in student behavior	2 years after student leaves the school district		Temporary - Short Term	
Student Transfers: School Choice and Permissive Transfer Records	Records documenting requests for transfers within the school district through permissive transfers or School Choice transfer programs	3 years	34 C.F.R. 80.42, 34 C.F.R. 200.44	Temporary - Short Term	
Summer School Files, Vocational	Records documenting the operation of summer vocational education programs	5 years	O.C.G.A. 20-2-168	Temporary - Short Term	
Teacher Lesson Plans	Documentation of teaching plans including subject, class period, activity, and/or project	2 years		Temporary - Short Term	
Teacher Program of Work Files	Documentation of all planning activities and schedules for contract teachers	1 year		Temporary - Short Term	
Teacher, Parent, Student Handbooks	Handbooks explaining school operating procedures	Permanent. Retain 1 copy		Permanent	
Teacher's Record of Student Attendance	Attendance register documenting daily attendance in each class	Pre-1940: Permanent Post-1940: 2 years		Permanent	
Teacher's Student Folders	Teacher's working file on each student	Retain for useful life		Transitory	
Textbook Adoption Recommendations	Recommendations for the selection and purchase of textbooks	10 years		Temporary - Short Term	
Textbook Requisition Files	Contracts and orders of approved course texts	1 year after new adoption implemented		Temporary - Short Term	
Title I Program Records	Records documenting application, receipt, and expenditure of Title I education funds for such programs as Even Start, Migratory Children, and Comprehensive School Reform	3 years after final financial report for the grant year		Temporary - Short Term	
Visiting Teacher Case Files, School Social Worker	Records of guidance provided to problem students by the school social worker	2 years		Temporary - Short Term	

GENERAL EDUCATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
TRANSITORY	Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).				
TEMPORARY-SHORT TERM	Information that needs to be retained less than fifteen years.				
TEMPORARY-LONG TERM	Information that needs to be retained for fifteen years or longer, but which does not need to be retained permanently.				
PERMANENT	Information that for legal, historical, fiscal, or administrative reasons needs to be retained forever.				

Atlanta Public Schools Retention Schedule

HEALTH SERVICES

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Adult Client Health Records	Records pertaining to clients older than 18 years of age (0427-016)	10 years from date of last service		Temporary - Long Term	
Certificates of Need	Records documenting the issuance of certificates of need for local government-operated health care facilities	3 years	O.C.G.A. 31-6-41	Temporary - Short Term	Where financial expenditures and contracts are associated with the CON - apply the longer retention for the contracts.
Child Client Health Records	Records pertaining to clients younger than 18 years of age (0427-017)	10 years after client reaches age of majority (18 in Georgia) or 28 years from date of last service		Temporary - Long Term	
Children's High-Risk Screening and Case Management Records (Babies Can't Wait, Children First)	All documents relating to health services provided to Babies Can't Wait and Children First clients(0427-019)	5 years from date of last service; for Children First, 5 years from program exit or 5th birthday		Temporary - Short Term	
Children's Medical Services Health Records	All health records pertaining to clients seen by Children's Medical Services (0427-018)	6 years after client reaches age of majority (21 years per Medicaid)		Temporary - Long Term	
Immunization Consent Records	Includes only consent forms for immunization (0427-022)	5 years from date of service		Temporary - Short Term	
Immunization Records (Post-1996)	Includes, but is not limited to recording of date of immunizations and associated clinical information in electronic system (GRITS) (0427-021)	6 years after client's death		Temporary - Long Term	
Immunization Records (Pre-1996)	Paper immunization records (0427-021)	Retain until child reaches age 28; includes any paper record not entered into electronic database		Temporary - Long Term	

HEALTH SERVICES

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Pregnancy-Related Services/Perinatal Case Management (PRS/PCM) Health Records	All documents relating to health services provided to PRS/PCM clients (0427-003)	6 years from date of last service		Temporary - Short Term	
Rodent/Nuisance Control Notices	Legal notification of violation of sanitation regulations that resulted in rodent infestation in a community or neighborhood	2 years		Temporary - Short Term	
Sanitation Surveys	Surveys and inspections of communities and neighborhoods for potential sanitation problems	1 year		Temporary - Short Term	
Scoliosis School Screening Records	All health records pertaining to scoliosis screenings (0427-026)	6 years from date of original screening		Temporary - Short Term	
Single-Encounter Health Records	Health records pertaining to one-time service encounters; includes newborn metabolic screening forms, individual consent service slips, sports physical forms, forms for walk-in PPDs, and hearing, vision, dental, or nutrition screening forms (0427-025)	5 years from date of service		Temporary - Short Term	
Syphilis Records	All documents relating to health services provided to clients diagnosed with syphilis (0427-013)	20 years from date of last service		Temporary - Long Term	
Tuberculosis Records (Cases/Treatment)	All documents relating to health services provided to tuberculosis patients; "cases" includes those clients with active TB infection and/or with latent TB infection (LTBI) and an abnormal chest X-ray (0427-020)	21 years from date of last service		Temporary - Long Term	
Tuberculosis Records (Negative X-rays)	(0427-020)	10 years from end of calendar year in which X-ray was taken		Temporary - Short Term	
Tuberculosis Records (Positive X-rays)	(0427-020)	10 years from end of calendar year in which X-ray was taken		Temporary - Short Term	

HEALTH SERVICES

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Tuberculosis Records (Prophylaxis/Prevention)	All documents relating to health services provided to tuberculosis clients; "prophylaxis" includes those clients with LTBI and a normal chest X-ray (0427-020)	21 years from date of last service		Temporary - Long Term	
Women, Infants, and Children (WIC) Health Records	WIC-associated health records; applies only to WIC health records kept separately from child health records (if WIC records are kept as part of child health records, follow schedule 427-017) (427-023)	Retain for 3 years past the end of calendar year in which date of last service occurred		Temporary - Short Term	
Zoning Responses	Response from the county health department on the review of land development, and zoning variance requests	5 years		Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

TEMPORARY-SHORT TERM Information that needs to be retained less than fifteen years.

TEMPORARY-LONG TERM Information that needs to be retained for fifteen years or longer, but which does not need to be retained permanently.

PERMANENT Information that for legal, historical, fiscal, or administrative reasons needs to be retained forever.

INFORMATION TECHNOLOGY

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Computer Inventory Records	Records documenting the assignment of a specific computer to an individual as well as an inventory of the software licensed for that computer; also may include IP address or mailbox assigned to the individual	4 years after computer removed from service or staff leaves agency	O.C.G.A. 16-9-93(g)(4)	Temporary - Short Term	Vital Record - duplicate and store offsite
Computer System Documentation	Hardware and software manuals and program coding	5 years and migration of all permanent records to new system		Temporary - Short Term	Vital Record - duplicate and store offsite
Equipment and Network Usage Documentation	Policies and procedures for appropriate use of agency equipment and software	4 years after superseded	O.C.G.A. 16-9-93g(4)	Temporary - Short Term	
Equipment Records	Include purchase orders, warranties, operation manuals and service contracts for all computer hardware and software	4 years after disposition of equipment	O.C.G.A 9-3-32	Temporary - Short Term	
Network and PC Password and Security Identifications	Records document the issuance or selection of a network password and the administration of security and monitoring of the agency's network	4 years	O.C.G.A. 16-9-93(g)(4)	Temporary - Short Term	Vital Record - duplicate and store offsite
System Architecture Documents and Wiring Schemas	Records documenting the location of wiring and the design of the overall agency network environment	3 years after obsolete or replaced		Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

TEMPORARY-SHORT TERM Information that needs to be retained less than fifteen years.

TEMPORARY-LONG TERM Information that needs to be retained for fifteen years or longer, but which does not need to be retained permanently.

PERMANENT Information that for legal, historical, fiscal, or administrative reasons needs to be retained forever.

Atlanta Public Schools Retention Schedule

LEGAL

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Attorney Case Files	Documents the work of the agency legal counsel in advising and representing the agency	6 years after settlement of case		Temporary - Short Term	
Attorney General's Opinions	Interpretations of the law and an agency's compliance with the law	Attorney General's Record: Permanent; Agencv Copv: 10 years		Permanent	
Legal Reference Materials	Opinions (both formal and informal), recommendations, and correspondence to the agency from the Attorney General or other legal counsel that is not part of a legal case file	10 years		Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

TEMPORARY-SHORT TERM Information that needs to be retained less than fifteen years.

TEMPORARY-LONG TERM Information that needs to be retained for fifteen years or longer, but which does not need to be retained permanently.

PERMANENT Information that for legal, historical, fiscal, or administrative reasons needs to be retained forever.

Atlanta Public Schools Retention Schedule

NUTRITION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
FSMC documentations	Through a contractual agreement with Food Service Management Company, data submitted to Nutrition Administration for monitoring and compliance	5 years plus current		Temporary - Short Term	
Monitoring and compliance reports	Reports used to monitor all Nutrition contracts for contractual compliance	5 years plus current		Temporary - Short Term	
Kitchen Equipment Inventory	Summary of large kitchen equipment in all school sites and storage.	5 years plus current			
Equipment Repair Log	Annual summary report of all large kitchen equipment repairs for all school sites.	5 years plus current		Temporary - Short Term	
Free and Reduced Price Meal Eligibility Report	GaDOE report verifying each school site and the District's annual free and reduced data.	5 years plus current		Temporary - Short Term	
Verification System Level	Summary report of District's confirmation of students eligibility for free and reduced price meals conducted thru a audit of random student selection.	5 years plus current		Temporary - Short Term	
Direct Certification	GaDOE/DFCS listing of students who are members of households receiving assistance under the SNAP (formerly Food Stamps) Program or TANF as eligible for free school meals.	5 years plus current		Temporary - Short Term	
Manager Classification Report	GaDOE summary report of each cafeteria managers' training profile.	5 years plus current		Temporary - Short Term	
Federal Eligibility Application (FEA) documentations	Supporting documentation of the FEA Process, requested reports, audit request, homeless student verification, household benefit change request, Non-Food Service Charter Schools, training information etc.	5 years plus current		Temporary - Short Term	

NUTRITION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Weekly/Monthly Commodity Inventory Analysis report	Summary if weekly and monthly USDA donated foods inventory.	5 years plus current		Temporary - Short Term	
Monthly Commodity Accounts Receivable report	Monthly summary of USDA donated foods received.	5 years plus current		Temporary - Short Term	
Boulevard Cold Storage weekly/monthly reports	Summary report of USDA donated foods inventory in offsite storage.	5 years plus current		Temporary - Short Term	
DE 0116	The DE 0116 provide USDA Commodity Food inventory values	5 years plus current		Temporary - Short Term	
USDA Forwarding Notice	The Forwarding Notice provides advance notice of quantities ordered for shipment and includes mode of transportation	5 years plus current		Temporary - Short Term	
Inventory records	Summary of all food inventories.	5 years plus current		Temporary - Short Term	
Department of Defense Reports (DOD)	Monthly summary of DOD data.	5 years plus current		Temporary - Short Term	
Commodity Receipts	Receipts of received USDA donated foods.	5 years plus current		Temporary - Short Term	
General Service Invoices	Invoices for all kitchen repair services received.	5 years plus current		Temporary - Short Term	
Equipment Transfer Form	Tracking of large kitchen equipment transferred between school sites, for Fix Assets reporting.	5 years plus current		Temporary - Short Term	
Property Receipt ledger for new equipment	Purchase receipts of new large kitchen equipment for Fix Assets reporting.	5 years plus current		Temporary - Short Term	
Commercial Waste Manifest	Invoices for all Grease Trap pumping services received.	5 years plus current		Temporary - Short Term	
Household applications for Free and Reduced Priced Meals Program	Household applications for Free and Reduced Priced Meals Program	5 years plus current		Temporary - Short Term	

NUTRITION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Free and Reduced Reports	Daily reports identifying students that have been process for thru Free and Reduced Meal Program.	5 years plus current		Temporary - Short Term	
Student Eligibility Notification Letters	Notification of the household meal eligibility status.	5 years plus current		Temporary - Short Term	
Journal entries	Support documentation used to record monthly financial transactions that are included in the monthly general ledger	5 years plus current		Temporary - Short Term	
Financial records	Documentation that support financial reporting to the State of Georgia and APS Finance Department	5 years plus current		Temporary - Short Term	
Monthly reconciliation	Nutrition account balances working paper and reports used in the monthly financial close and Board reporting	5 years plus current		Temporary - Short Term	
System generated reports	Hardcopy reports for the daily deposit, financial, and statistical data that is interfaced from Horizon to Lawson	5 years plus current		Temporary - Short Term	
DE107	Reports submitted to the State to received reimbursement for paid, free, and reduced meals that are served to APS students eligible for free, reduced, and paid lunches, breakfasts, and snacks	5 years plus current		Temporary - Short Term	
DE 106 claims	Each school report submitted to the State for meals that are served to APS students eligible for free, reduced, and paid lunches, breakfasts, and snacks	5 years plus current		Temporary - Short Term	
DE 106 financials	Each school financial report submitted to the State to supports each school meal claim.	5 years plus current		Temporary - Short Term	
Verification Application Level	Individual household confirmation of students eligibility for free and reduced price meals conducted thru a audit of random student selection.	5 years plus current		Temporary - Short Term	

NUTRITION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Site Orders	Orders placed by school sites, requesting donated foods.	5 years plus current		Temporary - Short Term	
Consolidated Order Summary report	Summary report of all consolidated orders.	5 years plus current		Temporary - Short Term	
Technology Equipment Inventory Database	Access database containing serial numbers and asset tags of active POS equipment.	Current Active		Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

TEMPORARY-SHORT TERM Information that needs to be retained less than fifteen years.

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Atlanta Public Schools Retention Schedule

PAYROLL

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Annual Payroll Earnings Reports	Summary of employees' payroll earnings for a fiscal year, including deductions	50 years after the tax year in which the records were created		Temporary - Long Term	Vital Record - duplicate and store offsite
Deduction Authorizations	Records documenting individual employee's authorizations to withhold taxes, to allow direct deposits and other deductions from the employee's pay	5 years after end of fiscal year	O.C.G.A. 48-7-111; 26 CFR 31.6001-1	Temporary - Short Term	Vital Record - duplicate and store offsite
Direct Deposit Records	Including blank checks used to establish direct deposit of employee's paycheck	1 year		Temporary - Short Term	
Employee Retirement Contribution Reports	Documents relating to participation in an agency-supported retirement program	6 years	O.C.G.A. 47-2-26; 48-7-111	Temporary - Short Term	
Garnishments	Records documenting the withholding of funds from an employee's wages at the request of the courts or a state agency	4 years after release from garnishment	26 CFR 31.6001-1; 29 CFR 516.5	Temporary - Short Term	Vital Record - duplicate and store offsite
Periodic Tax Reports	Records documenting taxable and non-taxable income of an agency	4 years	O.C.G.A. 48-7-111	Temporary - Short Term	
Salary and Wage Records	Pre-payroll reports, monthly payroll check registers, monthly fund distribution reports, and payroll action forms	4 years after the end of the fiscal year	O.C.G.A. 9-3-25; 26 CFR 31.6001-1	Temporary - Short Term	
Unclaimed Paychecks	Checks that remain unclaimed by employees	1 year	O.C.G.A. 44-12-206	Temporary - Short Term	
Unemployment Compensation Records	Documentation relating to employee claims for unemployment compensation	5 years after the end of the fiscal year in which the transaction occurred		Temporary - Short Term	
Wage and Rate Tables	Records utilized to calculate straight time and overtime work schedules	2 years	29 C.F.R. 516.6, 29 C.F.R. 1620.32	Temporary - Short Term	

PAYROLL

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Wage and Tax Statements (W-2)	An information return used to report wages paid to employees and the taxes withheld from them	4 years	O.C.G.A. 48-7-111; 26 CFR 31.6001-1	Temporary - Short Term	
Withholding Allowance Certificates (W-4)	Federal and state forms completed by an individual to establish the amount of taxes withheld from wages	4 years	O.C.G.A. 48-7-111; 26 CFR 31.6001-1	Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

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TEMPORARY-LONG TERM Information that needs to be retained for fifteen years or longer, but which does not need to be retained permanently.

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Atlanta Public Schools Retention Schedule

PERSONNEL

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Accident Reports	Reports of employee accidents and injuries; may include worker's compensation claims	2 years	O.C.G.A. 9-3-33; 36-11-1	Temporary - Short Term	
Affirmative Action Audits and Annual Reports	Document agency response to federal program reviews, state compliance audits, annual reporting requirements, and internal audits	3 years		Temporary - Short Term	
Affirmative Action Plans	Records documenting an agency's compliance with the requirements of the Equal Employment Opportunity Commission	3 years		Temporary - Short Term	
Applications for Employment, Not Hired	Records documenting applications for job openings including interview notes and materials, transcripts, background surveys, correspondence, etc.	2 years	29 CFR 1602.31	Temporary - Short Term	
Applications for Employment, Unsolicited or Incomplete	Records documenting applications for job openings	Retain for useful life		Temporary - Short Term	
Background Surveys	Copies of fingerprint cards and criminal background checks of new employees	7 years		Temporary - Short Term	
Cafeteria Plan (Flexible Benefits) Records	Records documenting salary reduction-type plans authorized by the Internal Revenue Service	6 years after termination of participation	IRS Code, Section 125; O.C.G.A. 36-1-11.1	Temporary - Short Term	
Continuation of Insurance Benefits (COBRA) Records	Copies of notices required under COBRA; documentation that required COBRA notices were received; documentation of any circumstances in which COBRA continuation is not offered due to gross misconduct	6 years	29 U.S.C. 1027 and 1161, 42 U.S.C. 300bb-1 to 8	Temporary - Short Term	Vital Record - duplicate and store offsite
Contracts, Teacher	School contracts for teaching services	7 years after expiration	O.C.G.A. 9-3-24	Temporary - Short Term	

PERSONNEL

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Converted Personal Leave Request	Records documenting converted personal leave requests	1 year after leave used		Temporary - Short Term	
Drug Testing Records	Records documenting the random drug testing of employees to include pre-employment, and reasonable suspicion	Positives & Refusals: 5 years. Negatives & Cancelled: 2 years	O.C.G.A. 45-20-13	Temporary - Short Term	
Employee Assistance Program Case Files	Records documenting the referral and treatment of employees in an agency-sponsored assistance program	5 years after employee completes program		Temporary - Short Term	
Employee Grievance Action Case Files. Resolved	Resolution of employee complaints against supervisor or other employee	2 years	29 CFR 1602.31	Temporary - Short Term	
Employee Handbooks	Guidelines created to explain the internal operations and procedures of the agency to a new employee	Permanent		Permanent	
Employee Medical Files, Toxic/Hazardous Substance Exposure	Documentation of employee exposure to hazardous materials	30 years after separation	29 CFR 1910.1020(d)	Temporary - Long Term	Vital Record - duplicate and store offsite
Employee Parking Records	Records documenting employee parking permit applications, cards, and permits	5 years after expiration of permit		Temporary - Short Term	
Employee Personnel Files - Permanent Staff	Records documenting an employee's work history with the agency, generally maintained as a case file; includes records of continuing education, performance evaluations, disciplinary actions, and background checks	7 years after separation	O.C.G.A. 45-20-13; 47-2-94	Temporary - Long Term	Vital Record - duplicate and store offsite
Employee Personnel Files - Temporary Staff	Records documenting the work of temporary staff that accrue no retirement benefits as part of their employment	7 years after no longer employed	O.C.G.A. 47-2-94	Temporary - Short Term	
Employee Retirement Plans	Copies of pension plans, both current and past, summarizing benefits and eligibility criteria	Permanent. Retain 1 copy		Permanent	
Employee Retirement Records, Inactive	Records including declaration of beneficiary, requests for retirement, insurance authorizations, correspondence, election of options forms, and other related materials	7 years after benefits end		Temporary - Long Term	

PERSONNEL

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Employee Salary Schedules	Records documenting pay scales and salary levels for all employees	Permanent		Permanent	Vital Record - duplicate and store offsite
Employment Eligibility Verification Records	I-9 forms	3 years after date of hire or 1 year after separation, whichever is longer	8 CFR 274a.2(b)	Temporary - Short Term	
Equal Employment Opportunity Commission (EEOC) Charges	Records documenting charges of discrimination filed against an agency	2 years or until final disposition of the charge or action	29 CFR 1602.31	Temporary - Short Term	
Equal Employment Opportunity Commission (EEOC) Reports	Reports classifying employees by race and gender that document compliance with EEOC rules	3 years	29 CFR 1602	Temporary - Short Term	
Family Medical Leave Case Files	Records documenting extended absence from work by an employee under provisions of the Family Medical Leave Act	3 years		Temporary - Short Term	
Georgia Commission on Equal Opportunity (GCEO) Complaints	Records documenting charges of discrimination filed against an agency	2 years or until disposition of charge or action	29 CFR 1602.31	Temporary - Short Term	
Group Health Insurance Policies, Expired	Group insurance policies held by a local government as part of the employee benefits program	10 years		Temporary - Short Term	
Insurance Claims, Closed	Records documenting the administration of a government-operated insurance program	5 years	O.C.G.A. 9-3-31; 9-3-32; 9-3-33	Temporary - Short Term	
Job Recruitment Materials	Records documenting efforts to advertise positions and attract qualified personnel	2 years	29 CFR 1602.31	Temporary - Short Term	
Leave Donation Records	Records documenting the donation of leave by employees to assist an individual who must be absent from work for an extended period of time due to illness	1 year after leave used		Temporary - Short Term	
Leave Records	Records documenting hours worked, leave earned, and leave taken; does not include final leave status	3 years		Temporary - Short Term	
Leave Status, Final	Records documenting cumulative leave held by an individual employee	Place in personnel file after separation	O.C.G.A. 47-2-91	Temporary - Short Term	Vital Record - duplicate and store offsite

PERSONNEL

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Position Classification Materials	Records documenting job requirements, description, and salary range	4 years after position is re-classified		Temporary - Short Term	
Pre-employment Assessments, Not Hired	Exams taken by those applying for positions with a local government	2 years	29 CFR 1602.31	Temporary - Short Term	
Retirement Incentive Program Records	Records documenting employees who elect for early retirement under government-offered incentive programs	6 years		Temporary - Short Term	Vital Record - duplicate and store offsite
Retirement System Transaction Reports	Status of individual pension accounts including interest, contributions, and withdrawals	10 years after fiscal year in which the record was created		Temporary - Short Term	Vital Record - duplicate and store offsite
Short/Long Term Disability Leave Files. Non-FMLA	Records documenting extended absence from work by an employee: non-FMLA	3 years		Temporary-Short Term	
Training Records	Records documenting attendance and course content for continuing education training	7 years		Temporary - Short Term	
Work Schedules and Time Sheets	Records documenting employee's daily and weekly work schedules	3 years	29 CFR 516.6	Temporary - Short Term	
Workers' Compensation Claims, Closed	Records documenting employee accidents, injuries, and medical claims	4 years and settlement of all claims due	O.C.G.A. 9-3-31	Temporary - Short Term	Vital Record - duplicate and store offsite
Worker's Permits	Permits to allow persons under 18 years old to obtain summer employment	Return to issuing officer (school board) after termination or failure to appear for 30 days	O.C.G.A. 39-2-13	Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

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PERMANENT Information that for legal, historical, fiscal, or administrative reasons needs to be retained forever.

Atlanta Public Schools Retention Schedule

PROPERTY

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Acquisition Records	Records documenting the purchase of property (real and personal) by an agency; does not include deeds or titles	5 years		Temporary - Short Term	Vital Record - duplicate and store offsite
Architectural Project Monitoring Files	Monitoring of the construction of local government facilities	7 years after project completion	O.C.G.A. 9-3-24	Temporary - Short Term	
Blueprints and Specifications, As-Built	Plans and specifications of government-owned facilities	Permanent	O.C.G.A. 9-3-51	Permanent	Vital Record - duplicate and store offsite
Building/Grounds Maintenance Remodeling and Repair Records	Documents the condition, upkeep and routine maintenance on agency facilities and grounds	7 years	O.C.G.A. 9-3-24	Temporary - Short Term	Vital Record - duplicate and store offsite
Capital Construction Project Records	Provides a record of the planning, administration and implementation of capital construction projects; includes project descriptions and requirements, bid records, plan reviews, project schedules, contract changes, consultant contracts, and budgets	11 years after completion of project		Temporary - Long Term	
Depreciation Schedules	Records documenting useful life and depreciation of agency-owned equipment and property, usually for insurance purposes	3 years after disposition of equipment or property		Temporary - Short Term	Vital Record - duplicate and store offsite
Equipment and Vehicle Purchases	Records documenting the purchase of agency-owned vehicles	5 years after disposition of equipment	O.C.G.A. 9-3-31	Temporary - Short Term	
Equipment Maintenance Records	Includes purchase orders, warranties, operating manuals, service contracts and service logs for maintenance of agency-owned equipment and vehicles	5 years	O.C.G.A. 9-3-31; 9-3-32	Temporary - Short Term	
Facility Inspection Files and Reports	Records documenting inspection of facilities to comply with standards, rules, and codes affecting health and safety of the occupants; includes security and safety inspections	Building Age 0-8 years: 11 years Building Age 9 years and older: 3 years	O.C.G.A. 9-3-33; 9-3-51	Temporary - Short Term	

PROPERTY

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Facility/Building Security Records	Records documenting security measures and procedures	5 years	O.C.G.A. 9-3-30	Temporary - Short Term	Vital Record - duplicate and store offsite
Federal Property Records	Records documenting the loan or lease of federal government equipment	7 years after expiration of contract or disposal of equipment	O.C.G.A. 9-3-24	Temporary - Short Term	
Fuel and Oil Usage Reports	Periodic reports of the consumption of diesel, gas, and oil in government-owned vehicles	3 years		Temporary - Short Term	
Fuel Tax Reports	Periodic reports of taxable and non-taxable diesel fuel usage by government-owned vehicles	3 years		Temporary - Short Term	
Government Equipment Lease Records	Records documenting the lease of government equipment (federal or state) by local governments	7 years after expiration of lease	O.C.G.A. 9-3-24	Temporary - Short Term	
Insurance Fund Claims	Records documenting requests for payment of insurance claims	5 years after claim is paid or denied	O.C.G.A. 9-3-31; 9-3-32; 9-3-33	Temporary - Short Term	Vital Record - duplicate and store offsite
Insurance Policies	Records documenting insurance purchase for agency facilities or of membership in risk management cooperatives	7 years after expiration of policy or membership	O.C.G.A. 9-3-24	Temporary - Long Term	Vital Record - duplicate and store offsite
Inventories	Listings of agency-owned property and equipment	Retain until superseded		Transitory	Vital Record - duplicate and store offsite
Leasing and Rental Records	Records documenting the leasing or renting of land, buildings, or facilities	7 years after expiration (or termination) of contract	O.C.G.A. 9-3-24	Temporary - Long Term	Vital Record - duplicate and store offsite
Maintenance Schedules	Schedules for maintenance of agency-owned equipment and vehicles	5 years	O.C.G.A. 9-3-26	Temporary - Short Term	
Maintenance Work Orders	Records documenting routine maintenance on facilities and property	5 years	O.C.G.A. 9-3-26	Temporary - Short Term	
Motor Pool Vehicle Records	Records documenting reservation and use of motor pool vehicles by agency personnel and gasoline usage by motor pool vehicles	5 years		Temporary - Short Term	

PROPERTY

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Property Disposition Requests (Surplus Property Records)	Documents a request for change in status of government-owned property	5 years		Temporary - Short Term	
Real Property Ownership Records	Deeds and supporting documentation for land owned by an agency	11 years after the year in which the property was sold or transferred	O.C.G.A. 9-3-51	Temporary - Long Term	Vital Record - duplicate and store offsite
Receipts of Responsibility	Records documenting property temporarily in use or possession of an employee	Retain until return of item to property manager	O.C.G.A.9-3-31; 9-3-32; 50-5-80	Temporary - Short Term	Vital Record - duplicate and store offsite
Restricted Area/Access Authorization Identification Records	Documents the issuance of security/access badges to staff	5 years after employee separation from service		Temporary - Short Term	Vital Record - duplicate and store offsite
Space Planning/Design Management Project Files	Evaluation and design of office space for local government agencies	3 years after project completion		Temporary - Short Term	
Utility Systems Operating and Maintenance Records	Records include equipment operations logs, mechanical reading charts, equipment maintenance histories	5 years after equipment is no longer in service	O.C.G.A. 9-3-26	Temporary - Short Term	Vital Record - duplicate and store offsite
Vehicle Accident Reports	Records documenting damage to agency-owned vehicles	5 years	O.C.G.A. 9-3-33; 9-3-32	Temporary - Short Term	
Vehicle and Equipment Cost Reports	Reports generated to assess and monitor the costs of agency-owned vehicles and heavy equipment	3 years		Temporary - Short Term	
Vehicle and Equipment Maintenance Files	Records documenting routine maintenance on vehicle and equipment	5 years after the vehicle is sold or replaced	O.C.G.A. 9-3-31; 9-3-32	Temporary - Long Term	Vital Record - duplicate and store offsite
Vehicle Parts Lists	Lists of replacement parts for agency-owned vehicles	3 years		Temporary - Short Term	
Vehicle Permits/Security Identification Records	Records documenting the issuance of vehicle decals providing access to security areas	2 years after expiration		Temporary - Short Term	
Vehicle Title Records	Documents agency ownership of cars, vans, trucks, trailers, tractors, etc.	Applications: Retain until receipt of title Title: Retain for duration of ownership	O.C.G.A. 9-3-31	Temporary - Short Term	Vital Record - duplicate and store offsite

PROPERTY

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Vehicle Usage Reports	Reports used to track fuel usage and mileage	3 years		Temporary - Short Term	
Vehicle Use Authorizations and Requests	Records documenting permission for employees to use their private automobiles for official business and receive reimbursement for mileage	5 years	O.C.G.A. 9-3-31; 9-3-32	Temporary - Short Term	

TRANSITORY Information of a temporary nature that does not meet the requirements for longer retention prescribed by O.C.G.A. § 50-18-94(1).

TEMPORARY-SHORT TERM Information that needs to be retained less than fifteen years.

TEMPORARY-LONG TERM Information that needs to be retained for fifteen years or longer, but which does not need to be retained permanently.

PERMANENT Information that for legal, historical, fiscal, or administrative reasons needs to be retained forever.

RECORDS MANAGEMENT

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Annual Master Negative Inspection Reports	Reports documenting the statistical sample of film inspected each year for signs of physical deterioration	Permanent		Permanent	
Condition Reports of Duplicating Masters	Records documenting the inspection of microfilm duplicating masters for signs of physical deterioration	Retain for useful life		Transitory	
Destruction Records	Records documenting the destruction of agency records	7 years		Temporary - Short Term	Vital Record - duplicate and store offsite
Inventories	Current listings of records created and maintained by an agency	5 years		Temporary - Short Term	Vital Record - duplicate and store offsite
Microfilm Processing Records	Records documenting the proper processing of silver gelatin and diazo films to show compliance with standards; does not include quality inspection reports	7 years		Temporary - Short Term	
Microfilm Production Records	Records documenting the preparation and filming of records such as production reports, activity reports, film logs, retake orders, title targets, and lists of records to be filmed	5 years		Temporary - Short Term	
Microfilm Quality Inspection Reports (Quality Control Reports)	Reports documenting the quality of individual rolls of film	Retain for life of microfilm		Temporary - Long Term	
Microfilm Transmittals and Evaluation Reports	Records documenting the transfer of film to a security storage facility and the condition of the film upon acceptance into the facility (evaluation report is completed by storage facility)	Retain for life of microfilm		Temporary - Long Term	Vital Record - duplicate and store offsite
Microfilm Vault Monitoring Records	Records documenting temperature and humidity conditions within a storage facility	5 years		Temporary - Short Term	Vital Record - duplicate and store offsite

RECORDS MANAGEMENT

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Records Schedules, Record Copy	Records retention schedule approved by resolution/ordinance; may be filed with other resolutions/ordinances	Permanent		Permanent	
Records Schedules, Reference Copies	Copies of approved agency records retention schedules	5 years after superseded		Temporary - Short Term	
Records Transmittal Records	Records documenting the transfer of agency records into the custody of a records center facility	5 years after disposition of transferred records	O.C.G.A. 16-8-4; 50-18-80; 50-146	Temporary - Short Term	Vital Record - duplicate and store offsite
Reference Requests	Reference pull sheets documenting the retrieval of records from a records storage facility	5 years		Temporary - Short Term	

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Atlanta Public Schools Retention Schedule

SAFETY AND SECURITY

Record Title	Description	Retention	Legal Reference	Retention Classification	Special Instructions
Accident Reports	Reports and investigations of injuries occurring on school grounds.	5 years	O.C.G.A. 9-3-33	Temporary - Short Term	1 year + current on site and 3 years off site.
Arrest and Booking Summary Statistics	Summary of daily, monthly and yearly totals of arrests.	5 years		Temporary - Short Term	
Emergency Dispatch Logs	Record of emergency calls received over radio and logged at the time of dispatch.	5 years		Temporary - Short Term	3 years On Site / 2 Off Site
False Alarm Report	Records of public safety officer's response to a false alarm or prank call	5 years		Temporary - Short Term	3 years On Site / 2 Off Site
Fire Drill Report	Documentation of all the drills held in each school.	3 years		Temporary - Short Term	On Site
Fire Alarm Report	Test and maintenance work performed on automatic fire alarm systems	5 Years		Temporary - Short Term	On Site
Incident Reports	Reports of incidents of suspects criminal activity investigated by public or safety officers.	5 years		Temporary - Short Term	2 year + current on site and 2 years off site.
Insurance Claims	Records documenting requesters for payment of insured claims.	5 years	O.C.G.A. 9-3-31; 9-3-32; 9-3-33	Temporary - Short Term	2 year + current on site and 2 years off site.
Maintenance Schedules	Schedule for maintenance of agency owned equipment & vehicle.	5 years	O.C.G.A. 9-3-26	Temporary - Short Term	
Motor Pool Vehicle Records	Records documenting reservation and use of motor pool v vehicles by agency personnel and gasoline usage by motor pool vehicle.	5 years		Temporary - Short Term	
Radio Control Logs	Record of the first official report of a fire or incident from incoming radio calls.	5 years		Temporary - Short Term	3 years On Site/ 2 Off site.

SAFETY AND SECURITY

Record Title	Description	Retention	Legal Reference	Retention Classification	Special Instructions
Radio Dispatch Reports	Reports of all alarms called into the station.	3 years		Temporary - Short Term	
Vehicle Accidents	Records documenting damage to agency owned vehicle	5 years	O.C.G.A. 9-3-33; 9-3-32	Temporary - Short Term	2 year + current on site and 2 years off site.
Vehicle Accident Reports	Reports of accidents involving government owned vehicle.	7 years		Temporary - Short Term	1 year + current on site and 5 years off site.
Vehicle Usage Reports	Reports used to track fuel usage and mileage.	3 years		Temporary - Short Term	Temporary Short Term
Vehicle Permits /Security Identification Records	Records documenting the issuance of vehicle decals providing access to secure areas.	2 years		Temporary - Short Term	
Vehicle purchase & Inventories	Record documenting the purchase of agency owned vehicle.	5 years		Temporary - Short Term	2 year + current on site and 2 years off site.

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Atlanta Public Schools Retention Schedule

TRANSPORTATION

Record Title	Description	Retention Period	Legal Reference	Retention Classification	Special Instructions
Acquisition/Relocation Assistance Parcel Files (Residential and Business)	Records documenting the purchase of property within designated noise impact areas surrounding an airport	7 years after year in which parcel is purchased		Temporary - Short Term	
Bus Route Records	Records establishing the route of public transit buses to provide service to residents	10 years		Temporary - Short Term	
Charter Bus Service Records	Records documenting the hiring of a bus company to provide services	3 years		Temporary - Short Term	
Limo Concourse Pick-up Authorizations	Permission for limo drivers to pick up passengers on the concourse	6 months		Temporary - Short Term	
Operations Reports	Record of individual bus operations maintained for management and statistical purposes	3 years		Temporary - Short Term	
Revenue and Passenger Reports	Reports documenting ridership and revenue statistics for the transit system	5 years		Temporary - Short Term	
Tire Mileage Reports	Reports documenting tire mileage of each transit vehicle	3 years		Temporary - Short Term	
Transit Operations Reports	Periodic reports on performance of the transit system	3 years		Temporary - Short Term	
Vehicles for Hire Violation/Hearing Case Files	Records documenting the adjudication of charges brought against taxi companies and drivers for violations of taxi cab regulations	5 years		Temporary - Short Term	

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