
Lehigh Career Technical Institute

Level IV Record Retention Matrix

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|--------------------------------|------------------------|----------------------------|------------------------|---------------------------|
| Academic Teacher | | | | |
| IEP (most current one only) | Academic Teacher Files | Until a new one is written | Shred | Principal/Academic Center |
| Completed Student Support Plan | Academic Teacher Files | End of school year | Shred | Principal/Academic Center |
| Parent/Guardian Notes | Academic Teacher Files | Current school year | Shred | Principal/Academic Center |
| Tests | Academic Teacher Files | Individual Basis | Shred | Principal/Academic Center |
| Quizzes | Academic Teacher Files | Individual Basis | Shred | Principal/Academic Center |
| Progress Reports | Academic Teacher Files | Current school year | Shred | Principal/Academic Center |
| Anecdotal Sheets | Academic Teacher Files | While employed | Shred | Principal/Academic Center |
| Discipline Referrals | Academic Teacher Files | Current school year | Shred | Principal/Academic Center |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|-----------------------|------------------------|-------------------------|------------------------|---------------------------|
| Family Contact Logs | Academic Teacher Files | Current school year | Shred | Principal/Academic Center |
| Email Correspondence | Academic Teacher Files | Current school year | Shred | Principal/Academic Center |
| Field Trip Forms | Academic Teacher Files | Current school year | Shred | Principal/Academic Center |

Adult Education

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|-----------------------------------|-------------------------------------|--------------------|-------|--|
| Student Records | Adult & Workforce Education Office | Enrollment + 1 yr. | N/A | Director of Post-Secondary and Workforce Ed. |
| Student Records | Adult & Workforce Education Storage | 99 years | N/A | Director of Post-Secondary and Workforce Ed. |
| Customized Job Training Contracts | STC Office | 10 years | Trash | Director of Post-Secondary and Workforce Ed. |

Attendance/Discipline Office

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|----------------------------------|---|----------------------|-------|------------|
| Student Handbook Compliance Form | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 year | Shred | Supervisor |
| Excessive Absence Letter | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| Disciplinary Referral Form | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|---|---|-------------------------|------------------------|-------------------------------|
| Witness Statement Form | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| Parent/Student Conference Form | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| Pupil Attendance History Report | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| LCTI Attendance Print Out | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| ALC Letter to Parent | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| Peer Mediation Form | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| Peer Mediation Student Form | Attendance/Discipline Storage/Year 3 in Records Storage | Enrollment + 2 years | Shred | Supervisor |
| Business Office Accounting Records | | | | |
| Budgetary Accounting Records - All Funds | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Accounts Payable | Business Office/Storage Room | 6 years | Trash | School Business Administrator |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|---------------------------------------|------------------------------|-------------------------|------------------------|-------------------------------|
| Cancelled Checks | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Check Registers | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Purchase Orders | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Cash Receipts | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| General Ledger Reports | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| General Ledger Journal Entries | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Bank Reconciliations | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Annual Independent Auditor Reports | Business Office/Storage Room | Permanent | N/A | School Business Administrator |
| Auditor General Audit Reports | Business Office/Storage Room | Permanent | Trash | School Business Administrator |
| Department of Education Annual Budget | Business Office/Storage Room | Permanent | N/A | School Business Administrator |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|---|------------------------------|-------------------------|------------------------|-------------------------------|
| Local Annual Approved Budgets | Business Office/Storage Room | Permanent | Trash | School Business Administrator |
| Department of Education Annual Financial Report | Business Office/Storage Room | Permanent | N/A | School Business Administrator |
| Annual Bid Files | Business Office/Storage Room | Permanent | Trash | School Business Administrator |
| Original Deposited Checks Processed by Remote Control Capture | Accounts Receivable | 30 days | Shred | School Business Administrator |

Business Office Miscellaneous

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|---|------------------------------|----------|-------|-------------------------------|
| Federal & State Grant Documents | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Industrial Appraisal Annual Report | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Critical Supplier List | Business Office/Storage Room | 6 years | Trash | School Business Administrator |
| Property and Liability Insurance Policies | Business Office/Storage Room | 40 years | Trash | School Business Administrator |
| Workers Compensation Policies | Business Office/Storage Room | 40 years | Trash | School Business Administrator |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|-----------------------------------|------------------------------|-------------------------|------------------------|-------------------------------|
| Group Insurance Policies | Business Office/Storage Room | 40 years | Trash | School Business Administrator |
| Labor Agreement & Contracts | Business Office/Storage Room | Permanent | N/A | School Business Administrator |
| Bond Issue Documents | Business Office | Permanent | N/A | School Business Administrator |
| Construction & Renovation Records | Business Office | Permanent | N/A | School Business Administrator |
| PlanCon Documents | Business Office | Permanent | N/A | School Business Administrator |

Business Office Payroll Records

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|---|------------------------------|-----------|-------|----------------------------------|
| Time Sheets | Business Office/Storage Room | 2 years | Trash | Human Resources/Benefits Manager |
| PSERS Retirement Quarterly Reports | Business Office/Storage Room | Permanent | N/A | Human Resources/Benefits Manager |
| Federal Form 941 Employer Quarterly Reports | Business Office/Storage Room | 6 years | Trash | Human Resources/Benefits Manager |
| Local Occupational Tax Quarterly Report | Business Office/Storage Room | 6 years | Trash | Human Resources/Benefits Manager |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|-----------------------------------|------------------------------|-------------------------|------------------------|----------------------------------|
| PA State Tax Quarterly Report | Business Office/Storage Room | 6 years | Trash | Human Resources/Benefits Manager |
| Federal W-2 Annual Wage Report | Business Office/Storage Room | Permanent | N/A | Human Resources/Benefits Manager |
| Bi-weekly Payroll Reports | Business Office/Storage Room | 40 years | Destroy | Human Resources/Benefits Manager |
| Reasonable Assurance Notices | Business Office/Storage Room | 6 years | Trash | Human Resources/Benefits Manager |
| Unemployment Compensation Notices | Business Office/Storage Room | 6 years | Trash | Human Resources/Benefits Manager |
| HIPPA Records | Business Office/Storage Room | 6 years | Destroy | Human Resources/Benefits Manager |

Career Academy Program

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|---------------------------------------|--------------------------|---------|-------|---|
| CAP Application Card | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| CAP Intake Questionnaire | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| CAP CO-OP Training Agreement(if app.) | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|---------------------------|--------------------------|-------------------------|------------------------|---|
| Field Trip Forms | Student Services Storage | Enrollment + 1yr | Shred | Director of Academic and Special Programs |
| Handbook Compliance Forms | Student Services Storage | Enrollment + 1yr | Shred | Director of Academic and Special Programs |
| Medical Card Copies | Student Services Storage | Enrollment + 1yr | Shred | Director of Academic and Special Programs |
| PSSA Results | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |

CTE Teacher Maintained

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|----------------------------------|-------------------|---------------------|-------|------------|
| Career Objective Form | CTE Teacher Files | Enrollment | Shred | Supervisor |
| Field Trip Forms | CTE Teacher Files | Current school year | Shred | Supervisor |
| Medical Information Card | CTE Teacher Files | Current school year | Shred | Supervisor |
| Internet Agreement Form | CTE Teacher Files | Current school year | Shred | Supervisor |
| Student Handbook Compliance Form | CTE Teacher Files | Current school year | Shred | Supervisor |
| Progress Reports | CTE Teacher Files | Current school year | Shred | Supervisor |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|-----------------------------|-------------------|----------------------------|------------------------|---------------------------|
| Discipline Referrals | CTE Teacher Files | Current school year | Shred | Supervisor |
| Safety Sign-Off Sheets | CTE Teacher Files | Current School Year | Shred | Supervisor |
| Anecdotal Sheets | CTE Teacher Files | While employed | Shred | Supervisor |
| IEP (most current one only) | CTE Teacher Files | Until a new one is written | Shred | Supervisor |
| In-School Suspension Forms | CTE Teacher Files | Current School Year | Shred | Supervisor |
| Parent-Guardian Notes | CTE Teacher Files | Current School Year | Shred | Supervisor |
| School To Work Forms | CTE Teacher Files | Current School Year | Shred | Supervisor |
| Tests, Quizzes | CTE Teacher Files | Individual Basis | Shred | Supervisor |

General Records

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|------------------------|--|----------|---------------|---|
| Board Minutes | Office of Business Administrator | 99 years | N/A | director of Postsecondary and Workforce Ed. |
| Act 48 Teacher's Files | Director for Curriculum & Instruction Office | 5 years | To Pers. File | Director of Curriculum and Instruction |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|---------------------------------|---|-------------------------------|------------------------|-------------------------------|
| Deed and Titles | Business Office | 99 years | Trash | School Business Administrator |
| Construction Drawings | Maintenance Shop/Facility Engineer's Office | 99 years | N/A | School Business Administrator |
| PM & Recurring Service Training | Facility Engineer's Office | 3 years | N/A | Facility Engineer |
| Maintenance Requests | Facility Engineer's Office | N/A - Online web based system | N/A | Facility Engineer |
| AHERA Documents | Facility Engineer's Office | 99 years | Trash | Facility Engineer |
| Water Test Reports | Facility Engineer's Office | 20 years | N/A | Facility Engineer |
| Locker Combinations | Facility Engineer's Office | While in use | Trash | Facility Engineer |
| ISO Corrective Action Requests | Facility Engineer's Office | 4 years | Trash | Facility Engineer |
| ISO Internal Audit Checklists | Facility Engineer's Office | 4 years | Trash | Facility Engineer |
| ISO Management Review Minutes | Facility Engineer's Office | 4 years | Trash | Facility Engineer |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|--|---|-------------------------|------------------------|--|
| Kitchen Equipment Calibration | Facility Engineer's Office | 3 years | Trash | Facility Engineer |
| Equipment Calibration Logs | Career & Technical Labs | 3 years | Trash | Director of Career & Technical Education |
| OAC Minutes | Director of Career & Technical Education Office | 99 years | Trash | Director of Career & Technical Education |
| Staff Safety Survey Results | Director of Career & Technical Education Office | 5 years | Trash | Director of Career & Technical Education |
| Student Safety Survey Results | Director of Career & Technical Education Office | 5 years | Trash | Director of Career & Technical Education |
| Water Usage | Maintenance Office | 10 years | Trash | Facility Engineer |
| Continuing Professional Development Survey Results | Cuirriculum | 5 years | Trash | Director of Curriculum and Instruction |
| Right To Know Training Records - Annual | Facility Engineer's Office (since 2008) | 30 years | Trash | Facility Engineer |
| Food Service Inventory Control Records | Food Service | 7 years | Trash | Food Service Manager |
| Employee Evaluations/Observations | Executive Director's Office | Permanent | N/A | Executive Director |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|-------------------------------------|---------------------------------|--|------------------------|--|
| Employee Salary Memo's | Executive Director's Office | Permanent | N/A | Executive Director |
| ISO 9001-2000 Revision Log | Facility Engineer's Office | 4 years | Trash | Facility Engineer |
| Chapter 339 Program Evaluations | Curriculum & Instruction Office | 5 years | Shred | Director of Curriculum and Instruction |
| Computer/Intranet User Agreements | Business Office/Storage Room | Permanent (04-08 to be transferred from FE Office) | N/A | Human Resources/Benefits Manager |
| Technology Work Requests | ITS Office | N/A - Online web based system | N/A | ITS Administrator |
| Equipment submittals | Facility Engineer's Office | Life of equipment | Trash | Facility Engineer |
| Right to Know Training Book Receipt | Business Administrator Office | 30 years (04-08 to be transferred from FE Office) | Trash | Human Resources/Benefits Manager |

Health Room

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|----------------------|---------------|----------|-------|----------------|
| MSDS Master Book | Health Office | 30 years | Trash | Health Officer |
| Medical Health Cards | Health Room | 1 year | Shred | Health Officer |

Permanent Rosters

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|-------------------------------|--------------------------|-------------------------|------------------------|---|
| Transcript Rosters | Student Services Storage | 100 years | Shred | Director of Academic and Special Programs |
| Pertinent Information Rosters | Student Services Storage | 100 years | Shred | Director of Academic and Special Programs |

School To Career

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|------------------------------|--|------------------|-------|--|
| DCO Career Objective | STC Office/Pupil Services Storage Area | 7 Years | Trash | Director of Post-Secondary and Workforce Ed. |
| DCO Application | STC Office/Pupil Services Storage Area | 7 Years | Trash | Director of Post-Secondary and Workforce Ed. |
| DCO Training Agreement | STC Office/Pupil Services Storage Area | 7 Years | Trash | Director of Post-Secondary and Workforce Ed. |
| DCO Student Progress Report | STC Office | Enrollment + 1yr | Trash | Director of Post-Secondary and Workforce Ed. |
| CO-OP STC Training Agreement | STC Office/Pupil Services Storage Area | 7 Years | Trash | Director of Post-Secondary and Workforce Ed. |
| CO-OP Sign Out Sheet | STC Office | Enrollment + 1yr | Trash | Director of Post-Secondary and Workforce Ed. |
| CO-OP Student Work Permit | STC Office | Enrollment + 1yr | Trash | Director of Post-Secondary and Workforce Ed. |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|-------------------------------------|-----------------|-------------------------|------------------------|--|
| CO-OP Student Drivers License | STC Office | Enrollment + 1yr | Trash | Director of Post-Secondary and Workforce Ed. |
| CO-OP Weekly Time Sheet | STC Office | Enrollment + 1yr | Trash | Director of Post-Secondary and Workforce Ed. |
| CO-OP Job Visitation Report | STC Office | Enrollment + 1yr | Trash | Director of Post-Secondary and Workforce Ed. |
| CO-OP Survey Report | STC Office | 3 years | Trash | Director of Post-Secondary and Workforce Ed. |
| DCO Monthly Attendance & Grade Form | STC Office | Enrollment + 1 year | Trash | Director of Post-Secondary and Workforce Ed. |

Student Services

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|---------------------------|--------------------------|------------------|-------|---|
| Career Objective | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| Course Change Card | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| Application | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| Specialty Selection Forms | Student Services Storage | Enrollment + 1yr | Shred | Director of Academic and Special Programs |

| TYPE OF RECORD | LOCATION | RETENTION PERIOD | DISPOSAL METHOD | PERSON RESPONSIBLE |
|------------------------------------|--------------------------|-------------------------|------------------------|---|
| Custody Agreements (if app.) | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| PFA Orders (if app.) | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| Emancipation Forms (if app.) | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| Senior Student Survey Report | Student Services Storage | 5 years | Shred | Director of Academic and Special Programs |
| CATS Records | Student Services Storage | 3 years | Shred | Director of Academic and Special Programs |
| Debt Letters (if app.) | Student Services Storage | Enrollment + 1 year | Shred | Director of Academic and Special Programs |
| Vanic Team Meeting Notes (if app.) | Student Services Storage | Enrollment + 1 year | Shred | Director of Academic and Special Programs |
| Task Check-Off Sheet | Student Services Storage | 7 years | Shred | Director of Academic and Special Programs |
| Check-Out Sheet | Student Services Storage | Enrollment + 1 year | Shred | Director of Academic and Special Programs |