

# San Dieguito Union High School District

## District Records

AR 3580

### Business and Noninstructional Operations

#### Classification of Records

Records means all records, maps, books, papers, and documents of a school district required by law to be prepared or retained as necessary or convenient to the discharge of official duty.

Before January 1, the Superintendent or designee shall review the prior year's records and shall classify them as either a Class 1 (Permanent), Class 2 (Optional), or Class 3 (Disposable) record.

Records of continuing nature (active and useful for administrative, legal, fiscal, or other purposes over a period of years) shall not be classified until such usefulness has ceased.

An inventory of equipment shall be a continuing record and shall not be classified until the inventory is superseded or until the equipment is removed from district ownership.

A student's cumulative record is a continuing record until the student ceases to be enrolled in the district.

When an electronic or photographed copy of a Class 1 (Permanent) record has been made, the copy may be classified as Class 1 (Permanent) and the original classified as either Class 2 (Optional) or Class 3 (Disposable). However, no original record that is basic to any required audit may be destroyed prior to the second July 1st succeeding the completion of the audit.

#### Class 1 - Permanent Records

The original of each of the following records, or one exact copy of it when the original is required by law to be filed with another agency, is a Class 1 (Permanent) record and shall be retained indefinitely unless microfilmed in accordance with 5 CCR 16022:

1. Annual Reports
  - a. Official budget
  - b. Financial reports of all funds, including cafeteria and student body funds
  - c. Audit of all funds
  - d. Average daily attendance, including Period 1 and Period 2 reports
  - e. Other major annual reports, including:
    - (i) Those containing information relating to property, activities, financial condition, or transactions
    - (ii) Those declared by Governing Board minutes to be permanent
2. Official Actions
  - a. Minutes of the Board or Board committees, including the text of rules, regulations, policies, or resolutions included by reference only

- b. The call for and the result of any elections called, conducted, or canvassed by the Board
- c. Records transmitted by another agency pertaining to its action with respect to district reorganization

### 3. Personnel Records

Class 1 (Permanent) records include all detailed records relating to employment; assignment; amounts and dates of service rendered; termination or dismissal of an employee in any position; sick leave record; rate of compensation, salaries, or wages paid; and deductions or withholdings made and the person or agency to whom such amounts were paid. In lieu of the detailed records, a complete proven summary payroll record for each employee containing the same data may be classified as a Class 1 (Permanent) record and the detailed records may then be classified as Class 3 (Disposable) records.

Information of a derogatory nature as defined in Education Code 44031 shall be retained as a Class 1 (Permanent) record only when the time for filing a grievance has passed or the document has been sustained by the grievance process.

### 4. Student Records

The records of enrollment and scholarship for each student required by 5 CCR 432 and all records pertaining to any accident or injury involving a minor for which a claim for damages had been filed as required by law shall be classified as Class 1 (Permanent) records. These include any related policy of liability insurance, except that these records cease to be Class 1 (Permanent) records one year after the claim has been settled or the statute of limitations has expired.

### 5. Property Records

Class 1 (Permanent) records include all detailed records relating to land, buildings, and equipment. In lieu of detailed records, a complete property ledger may be classified as a Class 1 (Permanent) record. The detailed records may then be classified as Class 3 (Disposable) records if the property ledger includes all fixed assets; an equipment inventory; and, for each piece of property, the date of acquisition, name of previous owner, a legal description, amount paid, and comparable data if the unit is disposed of.

### Class 2 - Optional Records

Any records considered temporarily worth keeping, but which are not Class 1 records, may be classified as Class 2 (Optional) records and shall be retained until reclassified as Class 3 (Disposable) records. If, by agreement of the Board and Superintendent or designee, classification of the prior year records has not been made before January 1 as specified in 5 CCR 16022, all records of the prior year may be classified as Class 2 (Optional) records pending further review and classification within one year.

### Class 3 - Disposable Records

All records not classified as Class 1 (Permanent) or as Class 2 (Optional) records shall be

classified as Class 3 (Disposable) records. These include, but are not limited to, detailed records basic to audit, including those relating to attendance, average daily attendance, or business or financial transactions; detailed records used in preparing another report; teachers' registers if all information required by 5 CCR 432 is retained in other records or if the General Records pages are removed from the register and classified as Class 1 (Permanent) records; and periodic reports, including daily, weekly, and monthly reports, bulletins, and instructions.

All Class 3 (Disposable) records shall be destroyed during the third school year after the school year in which the records originated. In addition, Class 3 (Disposable) records shall not be destroyed until after the third school year following the completion of any legally required audit or the retention period required by any agency other than the State of California, whichever is later. A continuing record shall not be destroyed until the fourth year after it has been classified as a Class 3 (Disposable) record.

### **Electronically Stored Information**

All electronically stored information related to the conduct of district business, including information created, saved, sent, or received on a district employee's or Board member's personal account or device, shall be saved as an electronic file to a district-provided account or device and retained in accordance with the section "Classification of Records" above. Such information includes, but is not limited to, email, text messages, instant messages, computer files, and other electronic communications related to district business. In addition, when appropriate, the information may be printed and physically filed in a way that allows it to be easily retrieved when needed.

Employees shall be required to regularly purge their email accounts and district-issued computers, cell phones, and other communication devices of personal electronically stored information and other information unrelated to district business. The Superintendent or designee may check for appropriate use of any district-owned equipment at any time.

Any person to whom a district-owned computer, cell phone, or other electronic communication device is provided shall be notified about the district's electronic information management system and, as necessary, provided training on the effective use of the device.

#### **State References**

#### **Description**

5 CCR 16020-16022

Records, general provisions

5 CCR 16023-16027

District records, retention and destruction

5 CCR 430

Individual student records; definition

5 CCR 432

Student records

CCP. 1985.8

Electronic Discovery Act -

<https://simbli.eboardsolutions.com/SU/18uDMWbz9B5rpSjjGu7hRw>

CCP. 2031.010-2031.060

Civil Discovery Act, scope of discovery demand -

<https://simbli.eboardsolutions.com/SU/xINv4klxKcElgqoCHUuHNA>

CCP. 2031.210-2031.320

Civil Discovery Act, response to inspection demand -

<https://simbli.eboardsolutions.com/SU/8tslshb1gQRCitVej3j91pUsw>

Civ.Code 1798.29

District records, specifically - breach of security -

Ed. Code 35145  
Ed. Code 35163  
Ed. Code 35250-35255  
Ed. Code 44031  
Ed. Code 49065  
Ed. Code 49069  
Gov. Code 12946

Gov. Code 6205-6210

Gov. Code 6252-6265  
Pen. Code 11170

**Federal References**

20 USC 1232g  
34 CFR 99.1-99.8

**Management Resources References**

Website

Public meetings  
Official actions, minutes and journal  
Records and reports  
Personnel file contents and inspection  
Reasonable charge for transcripts  
Absolute right to access  
Fair employment and Housing Act: discrimination prohibited

Confidentiality of addresses for victims of domestic violence, sexual assault or stalking

Inspection of public records  
Retention of child abuse reports

**Description**

Family Educational Rights and Privacy Act (FERPA) of 1974  
Family Educational Rights and Privacy Act

**Description**

California Secretary of State –  
<https://simbli.eboardsolutions.com/SU/slshUd8r0G1B6GmkfkmqmQslsh5w>

**Board Readopted: April 20, 2022**