

BUS14.1 - Office Management: Records Management

B - Business

Data and Records Retention (Records Management)

Objective:

The district will establish and maintain a comprehensive records management program in compliance with the law and the Uniform System of Financial Records. This program ensures that all required and relevant records are managed, stored, and disposed of in accordance with state guidelines.

1. Records Management Program:

The Governing Board will establish a records management program that complies with the standards set by the Arizona State Library, Archives, and Public Records (ASLAPR). Retention schedules will be submitted to ASLAPR for approval, and records will be maintained on paper, electronically, or both as permitted by state guidelines.

2. Custodianship of Records:

The Governing Board is the official custodian of all district records, both required and optional. The Superintendent will be responsible for ensuring that these records are protected and managed properly. The Superintendent may assign records management duties to other employees, specifying their responsibilities and the types of records under their control.

3. Records Maintenance:

Records must be prepared and maintained in a manner consistent with legal requirements and the Uniform System of Financial Records. Records must be stored in a secure manner to ensure their preservation and integrity. Electronic records will be managed following ASLAPR-approved guidelines.

4. Retention and Disposal:

The current year's records will be stored in the district administration office. When practical, but no later than during the second immediate past year, all paper records will be grouped, bundled together, and labeled with the disposal date noted on the label. Records will either be retained or disposed of in accordance with the retention schedule set by ASLAPR. Electronic records will follow similar guidelines for preservation and retention.

Legal References:

- Arizona Revised Statutes (A.R.S.) 15-271, 15-272, 15-341, 15-521, 23-721, 23-926, 23-962, 38-421, 38-423, 38-424, 39-101, 39-103, 39-121, 41-1346 et seq., 44-1373

Records Management Program

Objective:

The district will manage its business and financial records in accordance with the Uniform System of Financial Records and ASLAPR guidelines. This ensures proper documentation of district operations and compliance with state recordkeeping requirements.

1. Business and Financial Records:

The business office will be responsible for managing the following records:

- Annual district budget.
- Audit reports.
- Financial statements.

- Capital levy plans.
- Bids and contracts (excluding employment contracts).
- Deeds, leases, and lease purchases.
- Inventory records of general fixed assets.
- Any other records identified in the Uniform System of Financial Records.

2. **Other District Records:**

The district administration office will maintain the current year's records. When practical, but no later than during the second immediate past year, all paper records will be grouped, bundled together, and labeled with the disposal date noted on the label. Records maintained in an electronic format must comply with the guidelines set by the ASLAPR. All records will be retained for the number of years specified by the General Retention Schedules for School Districts and Charter Schools.

3. **Compliance:**

All records will be managed in compliance with the retention requirements set by the Records Management Division of the Arizona State Library, Archives, and Public Records.

Legal References:

- Arizona Revised Statutes (A.R.S.) 15-271, 15-272, 15-341, 15-521, 23-721, 23-926, 23-962, 38-421, 38-423, 38-424, 39-101, 39-103, 39-121, 41-1346 et seq., 44-1373