

# LINE MOUNTAIN SCHOOL DISTRICT

SECTION: OPERATIONS

TITLE: RECORDS MANAGEMENT

ADOPTED: September 27, 2016

REVISED:

800. RECORDS MANAGEMENT	
<p>1. Purpose</p>	<p>The Board recognizes the importance of establishing and maintaining a Records Management Plan that defines district staff responsibilities and complies with federal and state laws and regulations.</p>
<p>2. Authority SC 518</p> <p>65 P.S. Sec. 67.901 Pol. 828</p>	<p>The Board shall retain, as a permanent record of the district, Board minutes, annual auditor's reports and annual financial reports. All other financial records, including financial account books, orders, bills, contracts, invoices, receipts and purchase orders, shall be retained by the district for a period of not less than six (6) years.</p> <p>All other district records shall be retained in accordance with state and federal law and regulations and the district Records Management Plan approved by the Board.</p> <p>The district shall make a good faith effort to comply with all proper requests for record production. Selective destruction of records in anticipation of litigation is forbidden.</p>
<p>3. Definitions</p> <p>65 P.S. Sec. 67.102</p>	<p><b>Electronic Mail (Email) System</b> - a system that enables users to compose, transmit, receive and manage text and/or graphic electronic messages and images across local area networks and through gateways connecting other networks. This information consists primarily of messages but may include attachments such as calendars, directories, distribution lists, word processing documents, spreadsheets, and other electronic documents.</p> <p><b>Litigation Hold</b> - a communication ordering that all records and data relating to an issue being addressed by current or potential litigation or investigation be preserved for possible production during the litigation or investigation.</p> <p><b>Records</b> - information, regardless of physical form or characteristics, that documents a transaction or activity of the district and that is created, received or retained pursuant to law or in connection with a transaction, business or activity of the district. The term includes a document, paper, letter, map, book, tape, photograph, film or sound recording, information stored or maintained electronically and a data-processed or image-processed document.</p>





followed by a written notification (fax, e-mail or letter). A litigation hold shall be issued when a communication is received by a member of the school district administrative staff reasonably notifying the school district of a dispute that is current, threatened or impending. Administrative staff who receive any such communication shall immediately forward or relay the same to the Business Administrator.

- Records: The Business Administrator, in consultation with the Solicitor as needed, will decide which records are subject to the litigation hold and in which form the records will be retained or produced.
- Compliance: The Business Administrator or designee will be responsible for monitoring and ensuring the district's compliance with the litigation hold and in what format the records will be collected.

When possible, records and data shall be stored in their original form, including metadata, such as creation date, author, type of file, etc.

For any record not covered by the Records Retention Schedule, the Records Management Committee shall determine how long the record shall be kept and recommend any necessary revisions to the retention schedule.

The district shall maintain and dispose of records in a manner that protects any sensitive, proprietary or confidential information or individual privacy rights, and helps conserve natural resources.

#### Manual Records

Manual records, which include all records not stored electronically, shall be retained and disposed of in accordance with the Records Management Plan.

Manual records shall be indexed in an organized and consistent manner, reflecting the way the records will be retained and referenced for later retrieval.

The district shall develop and maintain adequate and up-to-date documentation about each manual record system. Documentation may list system title and responsible employee(s) or office.

#### Electronic Records

Electronic records shall be retained and disposed of in the same manner as records in other formats and in accordance with the Records Management Plan.

Electronic records shall be indexed in an organized and consistent manner, reflecting the way the records will be retained and referenced for later retrieval.

<p>65 P.S. Sec. 67.506</p>	<p>The district shall develop and maintain adequate and up-to-date documentation about each electronic record system. Documentation may:</p> <ul style="list-style-type: none"><li>- List system title and responsible employee(s) or office.</li><li>- Define the contents of the system, including records formats and database tables.</li></ul> <p><u>Email Records</u></p> <p>Email messages, in and of themselves, do not constitute records. Retention and disposition of email messages depend on the function and content of the individual message.</p> <p>Records on an email system, including messages and attachments, shall be retained and disposed of in accordance with the district's Records Management Plan.</p> <p>Email messages and attachments that do not meet the definition of records shall be deleted as required by the Records Management Plan.</p> <p>Email records may be maintained as an electronic record or be printed and maintained as a manual record.</p> <p>For each email considered to be a record, the following information shall be retained:</p> <ol style="list-style-type: none"><li>1. Message content.</li><li>2. Name of sender.</li><li>3. Name of recipient.</li><li>4. Date and time of transmission and/or receipt.</li></ol> <p><u>Contractors</u></p> <p>Records created or maintained by contractors employed by the Board shall be retained and disposed of in accordance with the Records Management Plan.</p> <p><u>References:</u> School Code – 24 P.S. Sec. 433, 518 Right-to-Know Law – 65 P.S. Sec. 67.101 et seq. Family Educational Rights and Privacy Act – 20 U.S.C. Sec. 1232g Federal Rules of Civil Procedure – 16, 26, 34, 37, 45</p> <p>Board Policy – 004, 006, 105.2, 114, 138, 203, 203.1, 209, 212, 216, 216.1, 233, 314, 324, 326, 334, 601, 609, 610, 618, 619, 702, 706, 716, 801, 810, 810.1, 828, 830, 912</p> <p>PSBA Revision 4/08 <span style="float: right;">© 2015 PSBA</span></p>
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