

	Finance/Business	FB24-0301
	Records Retention Policy	ADOPTED DATE: March 19, 2024 REVISED DATE:

PURPOSE: The purpose of this policy is to outline HGMICS’ records retention policy with regards to both student records and fiscal records.

SCOPE: This policy applies to HGMICS staff members.

POLICY AUTHORITY: Policy draft is reviewed by the CEO of HGMICS; then (1) sent to the Board of Trustees, and (2) presented at the next formal, public Board Meeting for review, public comment and approval.

DETAILED POLICY STATEMENT: HGMICS maintains the following types of school records: (1) Student enrollment records, (2) Student health records, (3) Student Special Education records, and (4) School fiscal records.

Student Enrollment Records: These records contain at a minimum: (1) enrollment notification form, (2) proof of age; (3) home language survey; (4) Parent Registration Form; (5) proof of residence. In addition, these records may also contain academic records, documentation related to truancy and address change documents. All records (hard copy and virtual) are kept in a secure location and access to files is limited.

Student Health Records: These records contain at a minimum: (1) Student immunization records; (2) private medical or dental evaluation forms. All records (hard copy and virtual) are kept in a secure location and access to files is limited.

Student Special Education Records: These records contain at a minimum: (1) current special education student records, including the Individualized Education Plan (IEP), and (2) psychological records. All records (hard copy and virtual) are kept in a secure location and access to the files is limited.

School Fiscal Records: These records contain at a minimum: (1) school tax returns; (2) school audit reports; (3) financial statements; (4) bank statements; (5) contracts; (6) invoices; (7) payroll records; and (8) insurance records.

HOWARD GARDNER MULTIPLE INTELLIGENCE CHARTER SCHOOL

Disposition of Student Records: Hard copy versions of student enrollment records will be maintained for seven years after the student has withdrawn or graduated from the school. Student health records will be physically maintained for a period of two years after the student has withdrawn or graduated from the school. Special education records may be destroyed once seven years has passed from the date a student has graduated or reached graduation age (if exiting the school before graduation). Virtual records of all categories will be maintained for a period of 100 years.

Disposition of Fiscal Records: Hard copy versions of all fiscal records will be maintained in a secure location for a period of seven years. Virtual records will be maintained on the school's server for a period of 100 years.