

Record Retention Procedures

1. Order record retention boxes from the warehouse stores system. (Stock # 30070)
2. Request barcode tags from Gary Taylor in the warehouse. Please provide quantity needed.
3. Download Record Retention form from PUSD website, under Purchasing/Warehouse.
<http://www.pleasanton.k12.ca.us/BusinessServices/Purchasing/Warehouse.cfm>
4. Fill out form (see sample form)
 - A. Date boxes prepared
 - B. Your department/school site
 - C. Originator of form
 - D. The title/type of the files
 - E. The actual year(s) you are retaining (ie: from:2005 to 2006)
 - F. Barcode Number
 - G. Retention period
 - H. List of actual files
5. Place barcode on the front of the box.
6. Place record retention form in the box, and make sure you make a copy for your file.
7. Repeat this process for each box.
8. Do not mix subject matter in the boxes.
ie: Please don't put travel expense reports in with teacher's grade books. They may require different retention periods.
9. When box(s) are completed, call Gary in the warehouse (426-4440) to schedule a pick-up.
10. When requesting a file to be retrieved, please contact Gary Ta

***Pleasanton Unified School District
Record Retention Form***

Date	Department	Sender	
Record Title		Record Dates	
		From: (Year)	To: (Year)
Barcode #		Retention Period	
		<input type="checkbox"/> 4 years <input type="checkbox"/> Perm <input type="checkbox"/> Other _____ (ie: 1 yr, 3 yrs, etc.)	
Detailed Listing of Box Contents (Please describe the items and place this sheet on top of the contents.)			
1			
2			
3			
4			
5			
6			
7			
WAREHOUSE USE ONLY		Location	Retention Date
Board Destruction Approval Date	Date Notified Retention Agency to Destroy Records		Date Records Destroyed

***Pleasanton Unified School District
Records Retention For***

Date 8-23-10	Department Counseling	Sender Joe Smith
Record Title Student Cum Files		Record Dates From: (Year) 2005 To: (Year) 2006
Barcode # 100920		Retention Period <input type="checkbox"/> 4 years <input checked="" type="checkbox"/> Perm <input type="checkbox"/> Other _____ (ie: 1yr, 3yrs, etc.)
Detailed Listing of Box Contents (Please describe the items and place this sheet on top of the contents.)		
1 Adams - Benson		
2		
3		
4		
5		
6		
7		
WAREHOUSE USE ONLY	Location	Retention Date
Board Destruction Approval Date	Date Notified Retention Agency to Destroy Records	Date Records Destroyed