



Records Retention Policy

Alexandria Country Day follows the guidelines set forth by NAIS for all record retention, off site storage, destruction of records, and electronic records. Our policy is reviewed and updated on an annual basis according to any recommended changes made by NAIS. All student, employee, health, business, and financial records are retained in file cabinets or on the school network system. The network system is an on-campus system, but it is backed up and stored each evening on and off campus. The on-campus portion is subject to environmental hazards but not the backup. When documents no longer need to be kept, they will be shredded by appropriate school personnel or by an outside company that specializes in such work. The schedule of records retention is as follows:

Type of Record	Paper or Electronic	Retention Period (years)
Account payables and receivables	Electronic, FINACS	Permanent
Checks scanned for deposit	Paper (and electronic with bank)	60 days then shredded
Records for wage computations	Paper	2
Audit reports	Paper and electronic	Permanent
Board documents		
Articles of Incorporation	Electronic	Permanent
Bylaws	Electronic	Permanent
Construction and major equipment records	Electronic	Permanent
Contract bids	Electronic	3
Contracts and agreements	Electronic	Permanent
Legal correspondence	Paper and electronic	Permanent
Minutes	Electronic	Permanent
Mortgage and note agreement	Electronic	Permanent
Property records	Paper	permanent
Donor records	Electronic, Donor Perfect	Permanent
Employee/personnel records	Paper	permanent
Employment Discrimination Filing	Paper	Until matter is resolved
FMLA leave	Paper	3

Records Retention Policy

Date adopted: October 22, 2019

Date to be reviewed: September 1, 2023

Responsible: Committee on Trustees

I-9 Forms	Paper	3 after hiring or 1 after end of relationship, whichever is later
Environmental reports		
Asbestos reports	Paper	10
Discharge Monitoring Reports	Electronic	3
Insurance		
Accident reports	Paper	6
Fire inspection reports	Paper	6
Policies and claims	Paper	Permanent
Student and alumni records		
Academic performance records	Paper	6
Admission folders	Paper	4
Comments and reports to parents (i.e., disciplinary and learning disabilities)	Paper	Length of tenure of student
Transcripts	Paper and electronic, Rediker	Permanent
Yearbooks	Paper, library	Permanent
Taxes (all tax documents)	Paper and electronic	Permanent

Records Retention Policy

Date adopted: October 22, 2019

Date to be reviewed: September 1, 2023

Responsible: Committee on Trustees