

Diocesan Records Series: Schools

Record Series	Series No.	Description	Retention	Disposition
Alumni Lists	2015.075	Records show name, address, month, and year of graduation.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
Class Photographs	2015.076	Photographs of each class in the school.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
Curriculum Materials	2015.077	Materials developed by diocesan educational programs to educate students in a particular subject. Documents the basic educational content, the source of the information and the manner in which it is to be presented. May include lesson plans.	Until administrative use ceases.	Destroy.
Diplomas	2015.078	Unclaimed diplomas and jackets of students either lacking credits for graduation, with outstanding fees or not picked up.	10 years after date student was to graduate.	Destroy.
Federal Title & Chapter Program Files	2015.079	Administrative files of federal Title and Chapter programs (grants and subsidies for educational purposes). Includes: applications, vouchers, compliance reports, etc.	3 years after the expiration of the contract or grant, provided that all audits and other requirements have been met. (34 CFR 668.24)	Destroy.
Graduation Programs	2015.080	Printed programs which list all graduates to be presented at graduation. May also list honors achieved, scholarships awarded, etc.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.

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INS Form I-20	2015.081	Federal I-20 form used to determine and prove a foreign student's eligibility to attend school in the United States.	3 years after the student has graduated, completed, or permanently withdrawn from the school. (8 CFR 214.3g)	Destroy.
Orders of Protection	2015.074	Certified copies of orders of protection filed with schools or daycare programs under the Illinois Domestic Violence Act of 1986 (750 ILCS 60/222(f)). File with Student Temporary Record.	See Student Temporary Record.	See Student Temporary Record.
Permission Slips Without Incident	2015.068	Records documenting parental permission for a child to participate in an activity (field trip, dance, athletics, etc.) without incident.	3 years.	Destroy.
Permission Slips With Incident	2024.001	Records documenting parental permission for a child to participate in an activity (field trip, dance, athletics, etc.) involving personal injury of a minor or disabled person if incident occurs.	2 years after legal disability is removed or minor reaches age 18. (735 ILCS 5/13-211)	Destroy.
		See also: Administrative-Insurance-Claims, Personal Injury of Minor or Legally Disabled Person For non-injury incidents, please consult Administrative-Insurance schedule for appropriate record series.		
Personnel Files: School Employees	2015.082	Files may contain evaluations, contract agreements, attendance records, resume, etc. Does not include payroll or pension records. See Retention Schedule Financial - Payroll Documentation See Retention Schedule Insurance - Pension Files, Pension Log Books, Pensions: Benefit Listings, or Pensions: Monthly Reports	Teacher Contracts (preferred), or other Evidence of Work and Salary History: Permanent. All Others: 5 years after termination. (29 CFR 1627.3)	Keep at School. Consult Archivist if records are fragile or overly numerous. Destroy.

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Pupil Record Cards	2015.069	Index cards (4x6) containing condensed student transcript. Includes name, address, DOB, dates entered and withdrawn, and grades for each class taken. Span from mid-1920s to late 1940s, depending on the school.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
Scholarship Files	2015.083	Records of scholarships and tuition reimbursements granted. May include applications, accounting for funds, correspondence, etc.	10 years after final disbursement. 735 ILCS 5/13-206	Destroy.
Scholarship Recipient List	2015.084	A list of all scholarship recipients. Kept for historical purposes.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
School Agreements	2024.001	May include Family School Agreements, Handbook Agreements, Photograph Agreements signed every year. Should be kept separate from Student Record.	10 years after completion of terms, expiration or cancellation. (735 ILCS 5/13-206)	Destroy.
School Calendar	2015.085	Calendar of school events.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
School Directory	2015.086	Directory of students, faculty and staff. May include information about school rules, policies, etc. If kept in electronic information system, directory information must be saved or exported for preservation purposes.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.

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Record Series	Series No.	Description	Retention	Disposition
School Evaluative & Accreditation Files	2015.087	Records relating to school evaluations and accreditation proceedings. May include final reports, interim reports, background materials and briefing papers. May include evaluations by WCEA, OCE or ISBE.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
School Handbooks	2015.088	Student and faculty handbooks which describe policies and procedures of the school.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
School Lunch Records	2015.070	Records pertaining to the administration of school and/or free and reduced lunch programs. May include order forms, reimbursement forms, reports, applications, verification records, direct certification records, etc.	3 years after submission of final claim for reimbursement. (7 CFR 210.23(c))	Destroy.
School Publications	2015.089	Newspaper or newsletter published by the school. Contains information about school events, issues of importance, op-ed, etc.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
School Statistical Data	2015.091	Statistical information collected by education office on various demographic and administrative concerns: racial, religious, enrollment testing, etc.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.

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Student Achievement Tests	2015.092	Any standardized test results arranged by class with summary data for each child. Retain child's summary data in student permanent record.	5 years after the class has graduated, completed, or permanently withdrawn from the school. (105 ILCS 10/4)	Destroy.
Student Achievement Tests - Summary Data	2015.093	Summary data compiled by testing source (e.g. NWEA, MAP, etc.). Reports sent to education office and schools for analysis and accountability.	Education Office: 5 years. Schools: Until administrative use ceases.	Destroy.
Student Grade Books	2015.094	May also be referred to as Teacher Evaluations of Students. Records of student grades: Each volume covers an academic year and includes one to three grade levels. May include name of student, DOB, date of enrollment, parents' names, grade, etc.	5 years. (105 ILCS 10/4)	Destroy.
Student Grade Books - Historical	2015.095	Pre-1950 records of student grades. Each volume covers an academic year and includes one to three grade levels. May include name of student, DOB, date of enrollment, parents' names, grade, etc.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.
Student Health Records	2015.071	The medical records of students. May include: identifying information, health history, results of mandated testing and screenings, medication dispensation records and logs (e.g., glucose readings), long-term medications administered during school hours, and other health-related information that is relevant to school participation (e.g., nursing services plan, failed screenings, yearly sports physical exams, interim health histories for sports).	60 years after student has graduated, completed, or permanently withdrawn from the school. (105 ILCS 10/4)	Destroy.

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Record Series	Series No.	Description	Retention	Disposition
Student Permanent Record	2015.096	The minimum personal information necessary to a school in the education of the student and contained in a school student record. Such information includes the student's name, birth date, address, grades and grade level, parents' names and addresses, attendance records, transcripts, achievement test scores (grades 9-12), record of release of information, etc.	Permanent, pending Archivist review.	Keep at School. Consult Archivist if records are fragile or overly numerous.
Student Religious Education Records	2015.097	Records which document the formal religious education of a student. May include sacramental certificate, enrollment forms, evaluations, notices to parishes, correspondence, parish school of religion registration cards, etc. Should not include record of First Reconciliation.	5 years.	Destroy.
Student Special Education Records	2015.098	Records that related to the identification, evaluation, placement, or provision of education to, students with disabilities. Includes Individualized Education Plans. Records created by public school districts may require return to the district upon student withdrawal; contact local district office.	5 years after student has graduated, completed, or permanently withdrawn from the school. (105 ILCS 10/4)	Destroy.
Student Temporary Record	2015.099	All information contained in a school student record but not contained in the student permanent record. Such information may include family background information, intelligence test scores, aptitude test scores, psychological and personality test results, teacher evaluations, achievement test scores (grades K-8) and other information of clear relevance to the education of the student. In addition, the student temporary record shall include information regarding serious disciplinary infractions that resulted in expulsion, suspension, or the imposition of punishment or sanction. For purposes of this provision, serious disciplinary infractions means: infractions involving drugs, weapons, or bodily harm of another.	5 years. 105 ILCS 10/4	Destroy.
Student Transfer Forms	2015.072	Record of a student transferring schools.	60 years after student has permanently withdrawn from the school. (105 ILCS 10/4)	Destroy.

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Record Series	Series No.	Description	Retention	Disposition
Transcript Requests	2015.100	Requests by students or schools for transcripts to be sent. Includes letter of requests and date sent.	60 years after student has graduated, completed, or permanently withdrawn from the school. (105 ILCS 10/4)	Destroy.
Tuition Contracts & Supporting Records	2015.101	Agreement between parents and school to pay tuition. May include billing notices, payment ledgers, receipts, etc.	10 years after completion of terms, expiration, or cancellation. (735 ILCS 5/13-206)	Destroy.
Visitor Logs	2015.073	The register tracking visitors to a school or agency.	3 years.	Destroy.
Yearbooks	2015.102	A published volume documenting the events of the school year.	Permanent.	Keep at School. Consult Archivist if records are fragile or overly numerous.

The following Diocesan authorities have approved all updates to this retention schedule:

Vice-Chancellor for Archives and Records <u><i>Katherine Oulre</i></u>	Date <u>7/23/2024</u>
Chancellor and General Counsel <u><i>[Signature]</i></u>	Date <u>7/24/2024</u>
Vicar Judicial <u><i>[Signature]</i></u>	Date <u>7/23/24</u>
Moderator of the Curia <u><i>[Signature]</i></u>	Date <u>7/23/2024</u>
Director, Department for Catholic Education <u><i>[Signature]</i></u>	Date <u>29 July 2024</u>