

County/Local Retention Schedule Instructions

Indiana Archives and Records Administration (IARA)
County/Local Records Management

These instructions apply to all approved County/Local Records Retention Schedules.

1) Reference the Appropriate Retention Schedule

Check your [office-specific Retention Schedule](#). If no Record Series applies, consult the [County/Local General Retention Schedule \(GEN\)](#). If no applicable record series is identified, contact IARA at cty@iara.in.gov for assistance.

2) Copy of Record vs. Duplicate

- Copy of Record: The official version that fulfills all legal and retention requirements.
- Duplicate: Other versions that contain the same information that are not used to fulfill all legal and retention requirements.

Unless a Record Series says otherwise, duplicates may be destroyed at any time without permission.

3) Digitizing Records

Records may be digitized under [OCPR Policies 20-01](#), [Policies 20-02](#), and IARA's [Electronic Records Guidelines](#).

After verifying completeness and legibility, the digitized record may be used as the Copy of Record, and the original then is considered a Duplicate.

Destroy the digitized version (now the Copy of Record) only after:

- Meeting the retention period.
- Completing a [Notice of Destruction of County/Local Government Records \(SF 44905\)](#). (Once destroyed, send the completed form to the [County Commission of Public Records](#).)

4) Managing Permanent and Critical Records

It is a best practice to maintain a physical copy of Permanent Records. For Critical Records, it is a best practice to maintain two copies: a physical copy that acts as the Copy of Record and a second copy that can be in any of the following approved formats:

- Physical paper or electronic format.
- Verified microfilm (per 60 IAC 2).
- Verified digitized files (per OCPR Policies and Electronic Records Guidelines).

Unsure if your record is scheduled? Need help?

Contact cty@iara.in.gov or (317) 232-3380.

5) Storage Options for Permanent and Critical Records

A Copy of Record may be stored:

- In the office of origin.
- With a trusted storage provider.
- In approved State/Federal Systems that meet standards and guarantee permanent access.

Store second copy separately to ensure continuity.

6) Managing Unscheduled Records

Before submitting forms for the destruction or transfer of unscheduled records, contact IARA for guidance. Approval is required prior to taking any action on unscheduled records.

7) Electronic Records Assistance

If you have questions about born digital records that are, or for help duplicating records electronically, contact the Electronic Records Program at erecords@iara.in.gov.

8) Litigation Holds

No record may be destroyed or transferred if it is involved in or anticipated to be involved in:

- Litigation, Claims, Audits, Public Information Requests, and/or Administrative Reviews.

Destruction or transfer can only proceed after all related actions are fully resolved.

9) Additional Guidance

- Multiple Record Series: If a record fits multiple Record Series, follow the longest applicable retention period.
- Form Examples: Forms listed in Record Series descriptions are examples, not exhaustive.
- Item Numbers: Used for convenience and may vary in printed copies.
- State Forms: To document destruction or transfer.
 - [State Form 44905](#): To destroy records on a retention schedule.
 - [State Form 30505](#): To destroy unscheduled records or severely damaged records.
 - [State Form 57236](#): To transfer scheduled or unscheduled records to state or county/local entities.

Please refer to the County/Local Records Custodian Handbook for additional information:
<https://www.in.gov/iara/files/handbook-countylocalrecordscustodian.pdf>



TRANSMITTAL OF PROPOSED / APPROVED RECORDS RETENTION AND DISPOSITION SCHEDULE

State Form 39443 (R9 / 04-25)

Section 1: Description of Proposed Changes

An approved records retention and disposition schedule grants your agency the authority to transfer or destroy records on a continuing basis in accordance with IC 5-15-5.1-5.

Below is an executive summary of the revisions made to the retention and disposition schedule of the following agency or division:

County/Local Educational Institutions (ED) Retention Schedule

Streamlining retention period language, amending descriptions, and reactivating a record series.

Section 2: Agency Approval of Proposed Changes

Please have your agency head or designee sign below to indicate approval of the proposed revisions. The proposed revisions will then advance to the next scheduled meeting of the Oversight Committee on Public Records (OCPR). You will be notified when OCPR has approved the revisions, and the schedule is finalized.

Return the signed form to the State Records Management Program at rmd@iara.in.gov.

Agency head signature (or designee) and date

N/A; IARA acts as agency head

Section 3: Oversight Committee on Public Records Approval of Proposed Changes

The Oversight Committee on Public Records met on 9/24/2025 and approved this records retention and disposition schedule for the use of the following agency or division:

County/Local Educational Institutions (ED) Retention Schedule

Oversight Committee on Public Records Secretary signature and date

S. C. W. L. Lightly



INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management
Educational Institutions Retention Schedule (ED)

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
ADMINISTRATION			
1	ED 16-017	BUILD - EPA ASBESTOS ABATEMENT RECORDS	PERMANENT. See Retention Schedule Instructions for format and transfer options.
2	ED 16-018	BUILD - EPA ASBESTOS INSPECTIONS REPORTS	DESTROY three (3) years after the next re-inspection as required by 40 CFR 763.94.
3	ED 16-019	BUILD - IDEM MONTHLY TREATMENT PLAN LAB REPORTS Sewage treatment.	DESTROY after three (3) years.
4	ED 16-020	BUILD - STATE FIRE MARSHAL ANNUAL SITE INSPECTION REPORTS	DESTROY after three (3) years.
5	ED 16-025	TRANS - BUS SAFETY INSPECTION REPORT (INDIANA STATE POLICE)	DESTROY after three (3) years.
6	ED 16-034	INST - ACHIEVEMENT TEST SCORE SHEET/SCORE BOOKLET Disclosure of these records may be affected by 34 CFR 99.30 through 99.37.	DESTROY after five (5) years.
7	ED 16-047	INST - TITLE I DISTRICT PLAN	PERMANENT. See Retention Schedule Instructions for format and transfer options.
8	ED 16-053	COMMUNITY EDUCATION - COURSE DESCRIPTIONS	DESTROY three (3) years after the course is no longer offered.
9	ED 16-054	COMMUNITY EDUCATION – CLASS RECORDS Enrollment forms, evaluations, and other records related to a particular instance (class) of an offered course.	DESTROY after three (3) years.
10	ED 16-056	LISTINGS OF CLASSES	DESTROY when no longer useful.
11	ED 16-057	CURRICULUM - ADOPTED TEXTBOOK LIST	RETAIN through two (2) adoption cycles.
12	ED 16-059	GUIDANCE ACTIVITIES, DECISIONS, AND IN-SERVICE RECORD	DESTROY after four (4) years.
13	ED 16-060	SCHOOL TESTING RESULTS RECORDS	DESTROY after four (4) years.
14	ED 16-061	ACCIDENT REPORT, ANNUAL SUMMARY	DESTROY after five (5) years.
15	ED 16-064	HEARING REPORT (STATE FORM 39986)	DESTROY after five (5) years.
16	ED 16-065	INDIVIDUAL STUDENT CUMULATIVE FILE Records created throughout the lifetime of the student's education; may span from pre-kindergarten through high school graduation or withdrawal, including adult education from approved dual credit courses. May include but is not limited to: testing results, special education, disability plans and services, placement records, record release letters, attendance, extra-curricular activity-related documents, disciplinary records, team and teacher evaluations, and entry/exit interview records. May also include record of student home visits and Preliminary Report of Alleged Child Abuse or Neglect (SF 114). Disclosure of these records may be affected by 34 CFR 99.30 through 99.37. Retention partially based on 34 CFR 300.573.	DESTROY five (5) years after the provision of educational services to the student, or when services are no longer being provided and destruction is requested by parents or a student over the age of eighteen (18) years old, whichever is sooner.

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
17	ED 16-066	<p>INDIVIDUAL STUDENT MEDICAL FILE</p> <p>Medical records created throughout the lifetime of the student's education; may span from pre-kindergarten through high school graduation or withdrawal. Records may include but are not limited to: student alcohol/narcotic screening reports, immunization record and status, list of medications given to student at school, student health screening results, tests, and referrals, record of student insurance coverage, medical examination records, statements of physicians, X-Ray lab reports, request for psychological services and release letter from psychologist.</p> <p>Disclosure of these records may be affected by 34 CFR 99.30 through 99.37, and 45 CFR 160 and 164. Retention partially based on 34 CFR 300.573.</p>	DESTROY five (5) years after the provision of educational services to the student, or when services are no longer being provided and destruction is requested by parents or a student over the age of eighteen (18) years old, whichever is sooner.
18	ED 16-080	STUDENT SUMMER SCHOOL REGISTRATION	DESTROY after one (1) year.
SCHOOLS			
19	ED 16-001	ACCIDENT REPORTS	DESTROY after three (3) years.
20	ED 23-001	<p>ATTENDANCE RECORDS</p> <p>School attendance registers, daily slips, summary sheets and other attendance records not specific to an individual student.</p>	DESTROY after three (3) years.
21	ED 16-011	EPA ASBESTOS MANAGEMENT PLAN	PERMANENT. See Retention Schedule Instructions for format and transfer options.
22	ED 16-012	SCHOOL SAFETY PLAN	DESTROY when superseded.
	ED 23-002	<p>SCHOOL EMERGENCY INCIDENTS</p> <p>Records of school actions in emergency situations, as well as reports on whether current safety plans (RS ED-16-012) were or were not followed, or were not applicable in practice. Should include a copy of the current safety plan at the time of the incident.</p>	PERMANENT. See Retention Schedule Instructions for format and transfer options.
24	ED 23-003	<p>STUDENT GRADE MANAGEMENT</p> <p>Student grades, whether managed electronically or in a hard copy system. Disclosure of these records may be affected by 34 CFR 99.30 through 99.37.</p>	DESTROY or DELETE information after five (5) years and after final grades are reflected in student's permanent transcript (RS ED-16-028).
25	ED 16-045	LESSON PLANS	DESTROY six (6) months after conclusion of academic year or when no longer useful, whichever is later.
26	ED 16-023	<p>PERMANENT RECORD CARDS</p> <p>Applies to all students from pre-kindergarten through high school graduation or withdrawal. Confidential.</p>	PERMANENT. See Retention Schedule Instructions for format and transfer options.
27	ED 16-027	RECORD OF ATHLETIC AWARDS	PERMANENT. See Retention Schedule Instructions for format and transfer options.



INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management
Educational Institutions Retention Schedule (ED)

ITEM #	RECORD SERIES	TITLE/DESCRIPTION	RETENTION PERIOD
28	ED 16-028	<p>PERMANENT ACADEMIC TRANSCRIPT</p> <p>The official academic record of the courses, credits, and programs completed by a high school student, through graduation or withdrawal from high school.</p> <p>Per IC 20-33-2-13, an official transcript must also include (but is not limited to) credits from any approved dual-credit courses taken at a post-secondary institution; attendance records; latest statewide assessment program results; any secondary or postsecondary certificates of achievement earned.</p> <p>Disclosure of these records may be affected by 34 CFR 99.30 through 99.37.</p>	PERMANENT. See Retention Schedule Instructions for format and transfer options.
29	ED 16-030	SENIOR AWARDS	PERMANENT. See Retention Schedule Instructions for format and transfer options.
30	ED 16-032	TESTING RESULTS, CLASSROOM AND BUILDING	DESTROY after five (5) years.
31	ED 16-033	STUDENT EMAIL ACCOUNT CONTENTS	DESTROY six (6) months after the close of the academic year during which the email was sent or received.
32	ED 16-036	LIB - CIRCULATION RECORDS AND FINE SLIPS	RETAIN until returned or resolved.
33	ED 16-039	LIB - PATRON FILES	DESTROY three (3) years after account becomes inactive.

2025 Record Series Update Overview

THIS IS NOT PART OF THE APPROVED RECORDS RETENTION SCHEDULE. It is only a detachable overview of the updates that were made to the County/Local Educational Institutions Retention Schedule in 2025.

SHADING KEY
This Record Series has amendments.
This is a reactivated Record Series with a new Record Series Number.

(Listed in the order in which they appear on the retention schedule to which this overview is attached.)

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
ED 16-017	ED 16-017 (Retention language has been updated.)
ED 16-047	ED 16-047 (Retention language has been updated.)
ED 16-057	ED 16-057 (Retention language has been updated.)
ED 16-065	ED 16-065 (Retention language has been updated.)
ED 16-066	ED 16-066 (Description language has been updated.)
ED 16-011	ED 16-011 (Retention language has been updated.)
ED 23-002	ED 23-002 (Retention language has been updated.)
EDS-16-045	ED 16-045
ED 16-023	ED 16-023 (Record Series title, description, and retention language has been updated.)
ED 16-027	ED 16-027 (Retention language has been updated.)
ED 16-028	ED 16-028 (Description and retention language has been updated.)
ED 16-030	ED 16-030 (Retention language has been updated.)

SUMMARY
Amended: ED 16-017, ED 16-047, ED 16-057, ED 16-066, ED 16-011, ED 23-002, ED 16-023, ED 16-027, ED 16-028, ED 16-030.
Reactivated with a new Record Series Number: ED 16-045.

If you have questions about this overview or about the County/Local General Retention Schedule, please contact IARA's County Records Management section at 317-232-3380 or ctv@iara.in.gov.

THIS IS NOT PART OF THE APPROVED RECORDS RETENTION SCHEDULE. It is only a detachable overview of the updates that were made to the County/Local Educational Institutions Retention Schedule in 2023.

SHADING KEY
This Record Series has a new RS Number on the right, but no other changes.
This Record Series has amendments in addition to the RS Number updates.
This Record Series is deactivated; use the record series on the right instead.
This is a brand new Record Series.

About the new Record Series Numbers: all series remaining on the retention schedule have a new RS Number. The change is only to the alphabetical prefix, which has been simplified from 3 letters (such as EDA, EDC, EDS) to the same 2- letter prefix (ED) for all, to reduce confusion and match the numbering style of all other county/local retention schedules.

No new RS Number ended up being duplicated. For every matching pair that used to exist (such as EDA-16-001 and EDS-16-001), one or both of them was already on the deactivation list or combined into another Record Series.

The guide below lists every "old" RS Number from the previous revision of this schedule, and the updated RS Number to use in the future.

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
EDA-16-001	GEN 23-05
EDA-16-002	GEN 23-06
EDA-16-003	GEN 10-04
EDA-16-004	GEN 10-03 for policy. GEN 10-04 for general files.
EDA-16-005	GEN 10-03
EDA-16-006	GEN 10-27
EDA-16-007	GEN 10-25
EDA-16-008	GEN 10-04
EDA-16-009	GEN 10-03
EDA-16-010	GEN 10-11
EDA-16-011	GEN 20-03
EDA-16-012	GEN 20-04
EDA-16-013	GEN 10-25
EDA-16-014	GEN 10-25
EDA-16-015	GEN 10-25
EDA-16-016	GEN 23-06
EDA-16-017	ED 16-017
EDA-16-018	ED 16-018
EDA-16-019	ED 16-019
EDA-16-020	ED 16-020
EDA-16-021	GEN 10-04
EDA-16-022	GEN 10-04
EDA-16-023	GEN 10-25
EDA-16-024	Nothing; these records are no longer created.
EDA-16-025	ED 16-025
EDA-16-026	Nothing; these records are no longer created.
EDA-16-027	Nothing; these records are no longer created.
EDA-16-028	Nothing; these records are no longer created.
EDA-16-029	GEN 10-05
EDA-16-030	GEN 10-11
EDA-16-031	Nothing; these records are no longer created.
EDA-16-032	ED 16-065
EDA-16-033	GEN 10-03
EDA-16-034	ED 16-034
EDA-16-035	GEN 10-25
EDA-16-036	GEN 10-25
EDA-16-037	GEN 10-25
EDA-16-038	ED 16-065
EDA-16-039	ED 16-065
EDA-16-040	GEN 10-25
EDA-16-041	GEN 10-25
EDA-16-042	GEN 20-03
EDA-16-043	GEN 10-27 (individual employees) or GEN 23-05 (general information)



EDUCATIONAL INSTITUTIONS RETENTION SCHEDULE (ED)
INDIANA ARCHIVES AND RECORDS ADMINISTRATION (IARA) – County/Local Records Management

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
EDA-16-044	GEN 10-25
EDA-16-045	GEN 10-25
EDA-16-046	GEN 10-25
EDA-16-047	ED 16-047
EDA-16-048	GEN 10-25
EDA-16-049	GEN 10-04
EDA-16-050	GEN 10-25
EDA-16-051	GEN 10-25
EDA-16-052	GEN 10-25
EDA-16-053	ED 16-053
EDA-16-054	ED 16-054
EDA-16-055	ED 16-054
EDA-16-056	ED 16-056
EDA-16-057	ED 16-057
EDA-16-058	GEN 20-03
EDA-16-059	ED 16-059
EDA-16-060	ED 16-060
EDA-16-061	ED 16-061
EDA-16-062	GEN 23-05
EDA-16-063	GEN 20-03
EDA-16-064	ED 16-064
EDA-16-065	ED 16-065
EDA-16-066	ED 16-066
EDA-16-067	GEN 23-05
EDA-16-068	GEN 10-27
EDA-16-069	GEN 20-04
EDA-16-070	GEN 10-25
EDA-16-071	GEN 10-25
EDA-16-072	GEN 10-25
EDA-16-073	GEN 10-10
EDA-16-074	GEN 10-04
EDA-16-075	ED 16-065
EDA-16-076	GEN 20-04
EDA-16-077	GEN 20-04
EDA-16-078	Nothing; these records are no longer created.
EDA-16-079	ED 16-028
EDA-16-080	ED 16-080
EDA-16-081	GEN 20-04
EDA-16-082	GEN 10-04
EDS-16-001	ED 16-001
EDS-16-002	ED 23-001
EDS-16-003	ED 23-001
EDS-16-004	ED 23-001
EDS-16-005	GEN 20-03
EDS-16-006	GEN 10-25
EDS-16-007	GEN 20-03
EDS-16-008	GEN 10-04
EDS-16-009	GEN 20-03
EDS-16-010	GEN 10-11
EDS-16-011	ED 16-011
EDS-16-012	ED 16-012
EDS-16-013	GEN 10-04
EDS-16-014	GEN 10-11
EDS-16-015	GEN 10-04
EDS-16-016	GEN 10-11
EDS-16-017	GEN 10-11
EDS-16-018	ED 23-003
EDS-16-019	ED 23-003
EDS-16-020	ED 23-003
EDS-16-021	ED 16-065

IF YOU USED TO USE RECORD SERIES...	NOW YOU SHOULD USE RECORD SERIES...
EDS-16-022	ED 16-065
EDS-16-023	ED 16-023
EDS-16-024	ED 16-065
EDS-16-025	ED 16-066
EDS-16-026	ED 16-066
EDS-16-027	ED 16-027
EDS-16-028	ED 16-028
EDS-16-029	GEN 20-03
EDS-16-030	ED 16-030
EDS-16-031	ED 16-065
EDS-16-032	ED 16-032
EDS-16-033	ED 16-033
EDS-16-034	ED 16-066
EDS-16-035	ED 16-066
EDS-16-036	ED 16-036
EDS-16-037	ED 16-036
EDS-16-038	GEN 10-11
EDS-16-039	ED 16-039
EDS-16-040	GEN 10-25
EDS-16-041	GEN 10-25
EDS-16-042	GEN 10-43
EDS-16-043	GEN 10-04
EDS-16-044	GEN 10-04
EDS 16-045	GEN 10-27
EDC-16-001	GEN 10-03
EDC-16-002	GEN 10-11
EDC-16-003	GEN 10-03

NEW RECORD SERIES	CREATED FOR...
ED 23-001	Attendance Records
ED 23-002	School Emergency Incidents
ED 23-003	Student Grade Management

SUMMARY

Only RS# changed: EDA-16-018, EDA-16-019, EDA-16-020, EDA-16-025, EDA-16-056, EDA-16-057, EDA-16-059, EDA-16-060, EDA-16-064, EDS-16-001, EDS-16-012, EDS-16-033.

Amended in addition to RS#: EDA-16-017, EDA-16-034, EDA-16-047, EDA-16-053, EDA-16-054, EDA-16-061, EDA-16-065, EDA-16-066, EDA-16-080, EDS-16-011, EDS-16-023, EDS-16-027, EDS-16-028, EDS-16-030, EDS-16-032, EDS-16-036, EDS-16-039.

Deactivated: EDA-16-001, EDA-16-002, EDA-16-003, EDA-16-004, EDA-16-005, EDA-16-006, EDA-16-007, EDA-16-008, EDA-16-009, EDA-16-010, EDA-16-011, EDA-16-012, EDA-16-013, EDA-16-014, EDA-16-015, EDA-16-016, EDA-16-021, EDA-16-022, EDA-16-023, EDA-16-024, EDA-16-026, EDA-16-027, EDA-16-028, EDA-16-029, EDA-16-030, EDA-16-031, EDA-16-032, EDA-16-033, EDA-16-035, EDA-16-036, EDA-16-037, EDA-16-038, EDA-16-039, EDA-16-040, EDA-16-041, EDA-16-042, EDA-16-043, EDA-16-044, EDA-16-045, EDA-16-046, EDA-16-048, EDA-16-049, EDA-16-050, EDA-16-051, EDA-16-052, EDA-16-055, EDA-16-058, EDA-16-062, EDA-16-063, EDA-16-067, EDA-16-068, EDA-16-069, EDA-16-070, EDA-16-071, EDA-16-072, EDA-16-073, EDA-16-074, EDA-16-075, EDA-16-076, EDA-16-077, EDA-16-078, EDA-16-079, EDA-16-081, EDA-16-082, EDC-16-001, EDC-16-002, EDC-16-003, EDS-16-002, EDS-16-003, EDS-16-004, EDS-16-005, EDS-16-006, EDS-16-007, EDS-16-008, EDS-16-009, EDS-16-010, EDS-16-013, EDS-16-014, EDS-16-015, EDS-16-016, EDS-16-017, EDS-16-018, EDS-16-019, EDS-16-020, EDS-16-021, EDS-16-022, EDS-16-024, EDS-16-025, EDS-16-026, EDS-16-029, EDS-16-031, EDS-16-034, EDS-16-035, EDS-16-037, EDS-16-038, EDS-16-040, EDS-16-041, EDS-16-042, EDS-16-043, EDS-16-044, EDS 16-045

Brand New: ED 23-001, ED 23-002, ED 23-003

If you have questions about this overview or about the County/Local General Retention Schedule, please contact IARA's County Records Management section at 317-232-3380 or cty@iara.in.gov.