Massachusetts
Statewide Records Retention Schedule
07-07

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Preface

The Massachusetts Statewide Records Retention Schedule continues to grow and evolve. A few new sections have been added to this version including: Massachusetts Highway Department, Department of Conservation and Recreation Well Driller Program, Massachusetts Labor Relations Commission, Middlesex Sheriff’s Office, and All Sheriffs. Several new record series have been added and a few have been modified.

Please note that new forms have been developed entitled "RCB-2E Application for Scanning and Destruction Permission, and RCB2M Application for Destruction Permission (microfilm)". These forms will enable us to describe the record keeping requirements for records that will be reformatted to electronic or microfilm forms. Contact the Records Management Unit for assistance in completing these forms.
Education

H

H1 Administration

1 HEGIS Report Records
Documents reports on the institution sent to the U.S. Department of Education.
Retention Period:
Permanent.

2 Dean's Records
Documents the Dean's activities. Includes subject or correspondence files maintained for monitoring and decision making purposes.
Retention Period:
Review by the Archives after administrative use ceases.
Note: See also record series "Executives' Correspondence/Subject Files (A3-1)".

3 Satellite Campus Oversight Records
Documents the management of satellite campuses. Includes reports, memos, directives, and related correspondence.
Retention Period:
Review by the Archives after administrative use ceases.

H2 Admissions

1 Student Admissions/Registration Records
Documents applications to the school and subsequent progress. Includes transcripts, acceptance letters, transfer records, course credit sheets and evaluations, veteran information, and related correspondence.
Retention Period:
(a) Matriculated students’ records: Retain 5 years after graduation or separation from institution.
(b) All other records: Retain 3 years.
Note: See also record series "Official Course and Grade Records (H5-6)".

2 Student Immunization Records
Documents the immunization of students entering the institution. Includes immunization record and related correspondence.
Retention Period:
(a) Students entering health training programs: Retain 5 years after separation from the program.
(b) All other records: Retain 10 years.
Note: See also record series "Student Health Clinic Records (H9-5)".

3 Tuition and Fees Records
Documents tuition and fee structure, analysis, and policy.
Retention Period:
(a) Policy documentation: Permanent.
(b) Actual payments: Retain 3 years after settlement.

4 Student Financial Aid Records
Documents aid given to students to help pay for schooling. Includes financial aid applications, federal student aid forms, federal tax forms, award letters and confirmations, verification records, and interview documentation.
Retention Period:
Retain 5 years after separation.

34 CFR.
H2 Admissions

5 Student Scholarships, Fellowships, and Awards Records
Documents the process to give scholarships and other aid awards.

Retention Period:
(a) Summary records: Permanent.
(b) All other records: Retain 5 years.

6 Student Record Transcript Requests Records
Documents requests for student transcripts.

Retention Period:
Retain 1 year.

H3 Academic Program

1 Academic Program Administration Records
Documents the routine daily administration of courses and programs of the institution. Includes referral, orientation, facilitative and other administrative correspondence and materials.

Retention Period:
Retain 3 years.

2 Academic Advisement Records
Documents faculty or academic advisors advisement of students.

Retention Period:
Retain 3 years after student graduates or separates from academic program.

3 Student Internships and Practicums Records
Documentation of field experience.

Retention Period:
Retain 5 years after separation. Record with registrar.

4 Independent/Cooperative or Alternate Study Records
Documents alternative course programming.

Retention Period:
Retain 3 years.

5 International Studies Program Records
Documents programs of foreign study sponsored or in conjunction with other colleges.

Retention Period:
Review by the Archives after 6 years.

6 Award Establishment Records
Documents the establishment of awards.

Retention Period:
(a) Summary documentation: Permanent.
(b) All other records: Retain until administrative use ceases.

7 Commencement and Awards Records
Documents graduation ceremonies and awards given to outstanding students. Includes programs, program revisions, logistical support documentation, and related correspondence.
Retention Period:
(a) Final programs with edits: Permanent.
(b) All other records: Retain 3 years
H4 Course and Curriculum

1 Curriculum Development Records
Documents the development of courses.

Retention Period:
Review by the Archives after administrative use ceases.

2 Class Schedule Records
Documents courses scheduled to be taught.

Retention Period:
Official copy: Permanent.

3 Course Outlines and Descriptions Records
Documents descriptions of courses taught by institution.

Retention Period:
Permanent.

H5 Testing and Grades

1 Student Tests and Examinations
Documents tests taken by students as part of course requirements.

Retention Period:
(a) Final tests taken as requirements for degree programs: Permanent.
(b) All other records: Retain 1 semester.

2 Student Evaluations of Teachers
Documents student evaluations of courses and instructors. Includes questionnaires and summary reports.

Retention Period:
(a) Where information is summarized: Retain summary report 6 years and discard data forms, otherwise:
(b) Retain data forms 6 years.

Note: Records may be used for tenure review.

3 Masters Theses
Documents papers completed as partial fulfillment of degree requirements.

Retention Period:
Permanent.

4 Academic Degree Audit Records
Documents review of student coursework to determine if they have met the requirements to receive their degree. Includes degree applications, degree audits, credit evaluations, course substitution forms, honors recommendations, and related notes and correspondence.

Retention Period:
(a) Approved degree application documents: Retain 5 years after graduation or separation.
(b) Denied or withdrawn application materials: Retain 1 year.

Note: Denied students are required to reapply and submit a new application to be considered for graduation.

5 General Educational Development (GED) Certification Records
Documents the certification that an individual has passed the GED test as equivalent of a high school education.

Retention Period:
(a) Official copy: Retain 60 years.
(b) All other records: Retain 3 years.
H5  Testing and Grades

6  Academic Degree Audit Records
Documents review of student coursework to determine if they have met the requirements to receive their degree. Includes degree applications, degree audits, credit evaluations, course substitution forms, honors recommendations, and related notes and correspondence.

Retention Period:
(a) Approved degree application documents: Retain 5 years after graduation or separation.
(b) Denied or withdrawn application materials: Retain 1 year.

Note: Denied students are required to reapply and submit a new application to be considered for graduation.

7  General Educational Development (GED) Certification Records
Documents the certification that an individual has passed the GED test as equivalent of a high school education.

Retention Period:
(a) Official copy: Retain 60 years.
(b) All other records: Retain 3 years.

8  Official Course and Grade Records
Provides a permanent record of student's courses taken and grades received as maintained by the Registrar.

Retention Period:
(a) Official course and grade books, transcripts, listings, or narrative degree evaluation materials: Permanent.
(b) Transcript requests: Retain 1 year.

H6  Faculty

1  Faculty Personal and Professional Papers
Consists of faculty research or other materials where left in the institutions care.

Retention Period:
Review by the Archives if left in custody of institution.

2  Tenure and Promotion Records
Documents changes in faculty employment.

Retention Period:
Retain 6 years.

3  Teacher Certification Records
Documents the certification of teachers by the Department of Education in compliance with 71 MGL 38G.

Retention Period:
(a) Records before 1980: Retain 40 years.
(b) All other records: Retain 6 years after expiration.

Educational Reform Act of 1993. 71 MGL 38G.

4  Faculty Appointment Records
Documents the appointment and subsequent history of individuals to join the institution's faculty.

Retention Period:
(a) Summary record: Permanent.
(b) All other records: Retain 6 years after separation.

5  Faculty Workload Records
Documents work assignments of individual faculty.
Retention Period:
Retain 3 years.

Note: These records may be used for tenure review.
H6  Faculty

6  Sponsored Research Records
Documents grants to pursue academic research.

Retention Period:
Review by the Archives after 6 years after close.

H7  Student Activities

1  Student Event/Activities Applications Records
Documents student participation in special activities.

Retention Period:
Retain 3 years.

2  Student Clubs and Associations Records
Documents the activities of student run clubs and associations.

Retention Period:
Review by the Archives after administrative use ceases.

3  Student Government Records
Documents activities of student government groups.

Retention Period:
Review by the Archives after administrative use ceases.

4  Student Newspaper
Documents the publication of the student newspaper.

Retention Period:
(a) Final publications: Permanent.
(b) Photographs and artwork: Review by the Archives after administrative use ceases.
(c) Newspaper staff memorabilia: Permanent.
(d) Summary policy and administrative records: Permanent.
(e) All other records: Retain 3 years.

5  Student Athletic Participation Records
Documents student participation in sports.

Retention Period:
(a) Retain summary documentation, films, and photos: Permanent.
(b) All other records: Retain 6 years after separation.

H8  Student Affairs

1  Student Grievance/Complaint Records
Documents student complaints.

Retention Period:
Retain 3 years after closure.

2  Student Discipline Records
Documents the discipline of students for infraction of school policy.

Retention Period:
(a) Expulsion records: Retain 25 years.
(b) All other records: Retain 3 years after separation.
H8  Student Affairs

  3 Student Disability Records
Provides a record of disability information on students.

  Retention Period:
Retain 5 years after student graduates or withdraws.

  4 International Students Case Files
Documents international students enrolled at the school.

  Retention Period:
Retain 5 years after separation.

H9  Student Services

  1 Student Support Services Records
Documents programs to support student life.

  Retention Period:
(a) Substantive summary data: Permanent.
(b) All other records: Retain 3 years.

  2 Special Services Program Records
Documents special programs for students not within normal course schedule.

  Retention Period:
(a) Summary records: Permanent.
(b) All other records: Retain 3 years.

  3 Student Counseling Records
Documents social services provided to students.

  Retention Period:
Retain 6 years after separation.

  4 Student Career/Placement Records
Documents records kept on file for placement purposes.

  Retention Period:
Retain 10 years.

  5 Student Health Clinic Records
Documents student clinic health histories. Includes visit documentation and charts, medical notes, and related correspondence.

  Retention Period:
Retain 30 years.

111 MGL 70.

H10  Library and Learning Center

  1 Borrowers Records
Documents library use by patrons.

  Retention Period:
Retain until items are returned.