



# CONFIDENTIAL CUMULATIVE FOLDER CHECKLIST

School Year: 20\_\_\_\_ - 20\_\_\_\_

Student's name: \_\_\_\_\_ Teacher: \_\_\_\_\_ Grade: \_\_\_\_\_

ITEM	RETENTION
<b>LEFT SIDE OF FOLDER</b>	
Confidential Cumulative Folder Checklist ( <b>Each year place documents in order as listed on checklist. Each year, check the documents added to the folder on the new checklist.</b> )	W/D + 7 yrs.
Enrollment Form or Registration Forms	W/D + 7 yrs.
Home Language Survey (blue card) ( <b>original only</b> – remove all others)	W/D + 7 yrs.
Guardianship Form (orange) (if applicable)	Until student is 18
CURRENT proof of address(current utility bill, current rent receipt or lease)	K-8 = W/D + 7yrs. 9-12 = until W/D
Copy of Birth Certificate	W/D + 2 yrs.
Copy of Social Security Card	W/D +7 yrs.
Student Attendance Detail	5 yrs.
TEAMS Withdraw Form ( <b>completed by teacher, office w/date of W/D, and parent signature, if possible</b> ) **Affix to Checklist (must be place in folder prior to sending to Records Mgmt.)	W/D + 5yrs.
Leaver Form ( if applicable)	5 yrs.
<b>RIGHT SIDE OF FOLDER</b>	
Legal Documents (most recent only – remove others) (divorce decree, court orders, adoption, change of name, etc.)	Until superseded or student is 18
Written consents from a parent or eligible student for information disclosure	Parent-till student is 18 Student- Permanent
Records request from & disclosures to parties with parent or eligible student consent or a party seeking directory information	2 yrs.
Records request from & disclosures to parties without parent consent (I.e. subpoenas, child protective services, etc.)	Permanent
Medical Records (if applicable or upon withdrawal)	W/D + 2 yrs.
Health Card and/or Immunization Record (Nurse will place in folder)	W/D + 2 yrs.
<b>PERMANENT RECORDS CARD (PLACED WITHIN FOLDER)</b>	
Permanent Record Card (AAR/Transcript ) – <b>Grade Card, Test Card &amp; Transcript</b> **Affix report card and test labels	K–8 = W/D + 7 yrs. 9–12 = Permanent
Report Cards (End of Year or Last Report Card at DOW) **Affix to the Grade Card	1 year after entry on grade card and/or transcript
TAKS Testing Labels (Affix Label to Test Card)	K–8 = W/D + 7 yrs. 9–12 = Permanent
<b>TESTING FOLDER</b>	
Reports of results of TAKS and other standardized state and national achievement, mental abilities, and aptitude tests reported by score, percentile rank, etc.	1 year after entry on test card
Reports of results of other tests or measurements (e.g., reading/mathematics profiles)	W/D +7 yrs.
Reading & Special Programs Card (after completion of 2 <sup>nd</sup> grade or upon withdrawal)	W/D + 7 yrs.
<b>SPECIAL PROGRAM FOLDERS (PLACE WITHIN FOLDER)</b>	
<b>BILINGUAL/LPAC FOLDER</b>	
See LEP Folder Checklist, if applicable (until no longer in program or withdrawal)	End of Service + 7yrs.
<b>504 PROGRAM FOLDER</b>	
Student Records, if applicable (until no longer in program or withdrawal)	End of Service + 7yrs.
<b>DYSLEXIA FOLDER</b>	
Student Records, if applicable (until no longer in program or withdrawal)	End of Service + 7yrs.
<b>GIFTED/TALENTED PROGRAM FOLDER</b>	
Student Records, if applicable (until no longer in program or withdrawal)	End of Service + 7yrs.
<b>ARI/AMI FOLDER</b>	
Student Records, if applicable (until no longer in program or withdrawal)	W/D + 7 yrs.
<b>OTHER SPECIAL POPULATIONS RECORDS</b>	
Student Records, if applicable (until no longer in program or withdrawal)	W/D + 7 yrs.