

OFFICE MANAGEMENT  
RECORDS MANAGEMENT PROGRAM

CPC  
(REGULATION)

RECORDS  
MANAGEMENT  
PLAN

The Assistant Superintendent or designee will review the record retention schedules approved by the Texas State Library and Archives Commission and make any additions or changes to these schedules as needed for Socorro Independent School District. These retention schedules will be submitted to the Records Manager. The Manager will compile the schedules from each department and submit the retention schedule to the Board of Trustees. Upon approval by the Board of Trustees, this schedule will be sent to the Texas State Library and Archives Commission for consideration.

The Assistant Superintendent of District Operations will designate a record storage area for the District.

Each assistant superintendent or designee will develop a plan for efficient storage of their records in accordance with the District's Retention Schedule. The plan for each department will be submitted to the Manager for filing.

Upon approval of the District's Retention Schedule by the Board of Trustees and the Texas State Library and Archives Commission, records may be destroyed. A notice of the destruction of records will be filed with the Manager.

REQUIRED  
DOCUMENTS FOR  
RETENTION FOR  
INTERVIEWS

When conducting interviews, at any campus or department, the following documents must be retained by the interviewing campus or department:

- Telephone References
- Personnel Action Form (PAF)
- Interview Timeline
- Final Ranking Form
- Confidentiality Statement
- Interview Tests
- Interview Notes (Interview Notes Form)
- Finalist Interview Documents
- Any other documents used during the interview process.

Each campus/department is responsible for keeping/maintaining the above-mentioned documents for 3 years. Those documents must be made available if there is an open records request (Policy CPC (Local) Policy CPC (Legal))

The principal or supervisor shall submit the following documentation to the Department of Human Resources for each recommendation submitted (See Regulation DC):

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- Telephone References
- Personnel Action Form (PAF)
- Interview Timeline
- Final Ranking Form

Three (3) telephone references are required for each recommended candidate if the candidate is from outside the district.

One (1) telephone reference is required for each recommended candidate that is a current district employee.

If a campus/department holds an interview and the applicant does not complete the recommendation or onboarding process, the campus/department must retain all interview documents for three (3) years.

MICROFILMING/  
COMPUTER  
IMAGING RECORDS  
AND REPORTS

The District may adopt a plan for micro photographing, computer imaging or microfilming records and reports to reproduce and copy records accurately or to originate records and reports on film or computer imaging files. This plan shall:

1. Specify the types of records and reports for recording on microfilm/computer imaging;
2. Require indices to microfilm/computer imaging records and reports;
3. Require the microfilm/computer imaging to meet requirements of the American National Standards Institute for Archival Quality, Density, Resolution and Definition unless the Board determines that the microfilm/computer imaging is intended for short-term use;
4. Require a person to certify that the microfilm/computer imaging record or report is a correct duplication of the original record or report; and
5. Guarantee the public free access to information in microphotographs, microfilms, and computer imaging files as required by law.

If made in compliance with legal requirements, a microfilm/computer imaging record or report is an original record

or report and shall be accepted by a court or agency of this state as an original record. A copy on paper or film of a microfilm/computer imaging record or report that is certified by a district record keeper shall be accepted by a court or agency of this state as a certified copy of an original record or report.

An original record or report that is microfilmed/computer imaged in compliance with a plan adopted under this policy may be destroyed at the Board's discretion, unless required to be preserved by state or federal law. An original district record or report that is not microfilmed/computer imaged in compliance with a plan adopted under this policy or is determined by the Board to be worthless may be destroyed at the Board's direction, unless required to be preserved by state or federal law.

If the subject matter of an original record or report is in litigation, the original record or report may not be destroyed until the litigation is settled or final judgment is rendered.

Approved:

Nate Carman, Ed. D., Superintendent

October 26, 2022

Board Committee Review:

November 7, 2022