



LIST OF RECORDS BY SUBJECT MATTER

July 26, 2020

AUDIT

1. Audits
 - a. Fiscal
 - b. Non-fiscal
2. Annual report of audit by independent public accountant
3. Financial disclosure

BOARD OF TRUSTEES

1. Agenda
2. Minutes of board meetings
3. Notices of annual meetings
4. Policies
5. Recordings, public meetings
6. Resolutions

BUDGET

1. Budget
 - a. Annual
 - b. Preliminary
 - c. Proposed

BUILDINGS & GROUNDS

1. Annual fire inspection reports of school facility
2. Architectural drawings
3. Construction and Repair Summary
4. Fire safety report
5. Insurance
 - a. Appraisals
 - b. Claims
 - c. Fire
 - d. Health
 - e. Liability
 - f. Policies
 - g. Property
 - h. Theft
 - i. Title
6. Logs
 - a. Accidents and illnesses
 - b. Equipment maintenance
 - c. Facility maintenance and repair
 - d. Legal
 - e. Telephone
7. Property damage report, as applicable



8. Safety drill tracker/recorder
9. Safety inspection
10. School safety, plans and records
11. Security
12. Vandalism reports
13. Videotapes
14. Visitor's register
15. Work orders

COMMUNICATION

1. Bulletins
2. Employee, SUNY and Parent Dashboards
3. Calendars
4. Code of Conduct
5. Correspondence
6. School Website
7. Internet and Technology
 - a. Services and use agreements
8. Lists
 - a. Mailing lists
 - b. Special Education and Related services
 - c. Student Rosters
 - d. Vendors
9. Manuals (student and staff)
 - a. Policies
 - b. Procedures
10. Newsletters
11. Photographs
12. Press Releases

CURRICULUM

1. Middle School Grades 6 through 8 Education
 - a. Program
 - b. Curriculum
 - c. Unit and Lesson Plans
2. Remote Learning program
3. Art Integration program
4. ELL program
5. Fitness program
6. Extra-curricular activities
 - a. Clubs (school-sponsored)
 - b. Field trips
 - c. Student organizations
7. Individualized Education Program (IEP)
8. Special Education services



9. Manhattan Youth After-school activities
10. Families Association
11. School admission/enrollment applications and registration packets

EDUCATIONAL DATA

1. Basic Educational Data System (BEDS)
2. Data Administration
3. Data Documentation
4. School Report Cards, Progress Reports, and Transcripts
5. Student Information Systems (Alma, Deanslist, Illuminate, SwipeK-12)

EQUIPMENT/INVENTORY

1. Report of fixed assets inventory
2. Maintenance and repair
3. Property
4. Records

FINANCE

1. Accounting records
2. Annual financial and statistical reports
3. Applications for federal grants and claims for reimbursements when such applications are granted
4. Banking and Investment
 - a. Checking
 - b. Deposits books and slips
 - c. Direct deposit records
 - d. Statements
5. Bids
 - a. Canceled
 - b. Capital construction
 - c. Purchasing
6. Billing records
7. Checks
 - a. Canceled
 - b. Copies and check stub
 - c. Payroll
 - d. Pre-consolidation
 - e. Registers
 - f. Voided
8. Cash disbursements ledger
9. Cash receipts
10. Cash transactions
11. Check register
12. Expenditure ledger
13. General journal



14. General ledger and revenue ledger
15. Paid bills, including invoices or claims, purchase order copies, receiving information, requisitions, packing slips, and other pertinent data appropriate for payment
16. Past-due accounts
17. Purchase orders
18. Purchase requisitions
19. Reimbursements, claims
20. State aid reimbursement/reports
21. Transfer of funds register
22. Treasurer's monthly report
23. Warranties and guarantees

FUNDING

1. Awards, grants and gifts
2. Fundraising
3. Gifts and prizes awarded to students
4. Scholarships and awards
5. State Aid funding

INSURANCE

1. Policies
2. Liability

LEGAL

1. Americans with Disabilities Act
 - a. Compliance Records
2. Child abuse and maltreatment reports
3. Claims, notice of
4. Claims and warrants
5. Contracts
 - a. Vendor Agreements
 - b. Offer and Continuation Letters
6. Court Orders
7. Freedom of Information Law requests
8. Hearings
 - a. Audits
 - b. Budget
 - c. Employee grievance
 - d. Public
 - e. Referendum
 - f. Student disciplinary
9. Internal Investigations
10. Legal Actions
 - a. Briefs
 - b. Insurance cases



- c. Subpoena
- 11. Legal notices

PAYROLL AND PERSONNEL

- 1. Administrative organizational chart
- 2. Affirmative action investigations, if applicable
- 3. Employees
 - a. Contract for contractors/W-9s/Invoices
 - b. Disciplinary proceedings/PIP/Performance Warnings
 - c. Pay Rate Acknowledgements
 - d. Employee Assistance Program provided by Little Bird
 - e. Financial disclosures
 - f. Grievances, if applicable
 - g. Employee Health insurance provided by Empire Blue Cross through Little Bird
 - h. Injury and illness records
 - i. Personnel records
 - j. Timesheets for hourly employees through Paylocity
- 4. Insurance
 - a. Unemployment
 - b. Workers' Compensation
- 5. Organization chart
- 6. Payroll
 - a. Assignments and garnishments of salary
 - b. Checks
 - c. Direct deposit records
 - d. Individual earnings records
 - e. Payroll register (computer print-out)
 - f. Wages
- 7. Records of names, business addresses, titles, and salaries of all officers and employees
- 8. Professional Development Plan
- 9. Professional Performance Review Plan
- 10. Resignations
- 11. Termination of employment
- 12. Work schedules
- 13. Workers' Compensation
- 14. Working Papers

RECORDS

- 1. Academic records
- 2. Archival records
 - a. Administration
 - b. Retention and destruction of Records
- 3. Attendance plans
- 4. Attendance records
- 5. Disciplinary records



- a. Employees
- b. Students
6. First aid records
7. Grade reports
8. Guidance records
9. Health records
 - a. Employee
 - b. Students
10. Hiring records, employees
11. ID cards
12. Immunization records
13. Instructor's grade records, test scores and marking sheets
14. Interns and volunteers, personnel records
15. Interview records, employee
16. Job classification records
17. Job postings
18. Meeting files
19. Memoranda
20. Permanent record cards
21. Public access to records
22. Pupil Personnel cumulative record
23. Records disposition & retention schedule
24. Records management
25. Reports
 - a. Accident
 - b. Administrative
 - c. Annual
 - d. Budget
 - e. Fire safety inspection
 - f. Fiscal
 - g. Health
 - h. Property damage
 - i. Safety
 - j. Special Education
 - k. Statistical
 - l. Student data
 - m. Teacher resource and computer training center
 - n. Theft
 - o. Vandalism
26. Telephone logs

TESTING

1. Achievement tests
2. Aptitude tests



3. Examinations
 - a. Regents
 - b. Trimester Assessments
 - c. Other formative and summative assessments

TRAINING

1. Defibrillator/CPR
2. Teacher Resource and Computer Training Centers
 - a. Certification records
 - b. Course records
 - c. Earnings credit records
 - d. Grade and test records
 - e. Reports
 - f. Workshops

TRANSPORTATION

1. DOE OPT Services/Bussing
2. Metro Cards
3. Correspondence

MISCELLANEOUS

1. Correspondence
2. Registers
 - a. Accounting
 - b. Archives users
 - c. Bond and Note issue and cancellation
 - d. Invoices
 - e. Students with disabilities records
 - f. Visitor logs and sign in
3. Registration Records

PLEASE NOTE: Records will be made available for public inspection and/or copying, except that we may deny access to records or portions thereof that:

- are specifically exempted from disclosure by state or federal statute;
- if disclosed, would constitute an unwarranted invasion of personal privacy;
- if disclosed, would impair present or imminent contract awards or other negotiations;
- are trade secrets or are submitted to an agency by a commercial enterprise or derived from information obtained from a commercial enterprise and which, if disclosed, would cause substantial injury to the competitive position of the subject enterprise;
- are compiled for law enforcement purposes and which, if disclosed, would:
 - o interfere with law enforcement investigations or judicial proceedings;
 - o deprive a person of a right to a fair trial or impartial adjudication;
 - o identify a confidential source or disclose confidential information relating to a criminal investigation; or
 - o reveal criminal investigative techniques or procedures, except routine techniques and



procedures;

- if disclosed, could endanger the life or safety of any person;
- are inter-agency or intra-agency materials which are not:
 - o statistical or factual tabulations or data;
 - o instructions to staff that affect the public;
 - o final agency policy or determinations;
 - o external audits, including but not limited to audits performed by the comptroller and the federal government; or
- are examination questions or answers which are requested prior to the final administration of such questions;
- if disclosed, would jeopardize an agency's capacity to guarantee the security of its information technology assets, such assets encompassing both electronic information systems and infrastructures.