

STATE OF CALIFORNIA
**RECORDS RETENTION SCHEDULE
 APPROVAL REQUEST**

STD. 72 (REV. 2-96)

Submit three copies with three copies of the
 Records Retention Schedule, STD. 72.

(1) DEPARTMENT, BOARD OR COMMISSION
 California Department of Education
 DIVISION, BUREAU OR OTHER UNIT
 Educational Planning and Information Center (EPIC)
 Address: 111-50
 721 Capitol Mall, 4th Floor, Sacramento CA 95814

TO: DEPARTMENT OF GENERAL SERVICES
 OFFICE OF INFORMATION SERVICES
 1500 5th Street, Room 116
 Sacramento, CA 95814 (or IMS C-39)

CHECK THE APPROPRIATE BOX:
 (2) New schedule of records that have never been scheduled. (Complete boxes 5 - 8.)

(3) Revising a previous schedule. (Complete boxes 5 - 12.)
 (A new approval number will be assigned.)

(4) Amending some pages of a previous schedule. (Complete boxes 8 - 12.)
 (The original approval number will remain in effect.)

NEW SCHEDULE INFORMATION (If applicable)	(5) SCHEDULE NUMBER	(6) SCHEDULE DATE	(7) NUMBER OF PAGES	(8) CUBIC FEET (Total Schedule)
	E00-06	2/18/2000	2	102.5
PREVIOUS SCHEDULE INFORMATION (If applicable)	(9) SCHEDULE NUMBER(S)	(10) APPROVAL NUMBER(S)	(11) APPROVAL DATE(S)	(12) PAGE NUMBER(S) REVISED
	E91-30	92-185	9-21-92	2

PART I -- AGENCY STATEMENTS

As the program manager (or person authorized to sign for the program manager) directly responsible for the records listed on the attached schedule, I certify that all records are listed, that I have reviewed the need for the records, (per Section 1611 of the State Administrative Manual) that each retention period is necessary and correct as scheduled, and (for a revised schedule) that all items on the previous schedule have been accounted for.

(13) SIGNATURE OF MANAGER DIRECTLY RESPONSIBLE FOR THE RECORDS
 (14) TITLE
 Manager, EPIC Unit
 (15) DATE SIGNED
 2/16/2000

In accordance with Government Code 14755, approval of the attached Records Retention Schedule by the Department of General Services is hereby requested. Retention periods have been established by this agency after a careful evaluation of all the factors listed in Section 1667 of the State Administrative Manual.

I hereby certify that I am authorized to act on behalf of the head of this agency in matters pertaining to the retention and disposal of records. (Per Section 1611 of the State Administrative Manual.)

(16) SIGNATURE, RECORDS MANAGEMENT ANALYST
 (17) TITLE
 RMA
 (18) NAME (Printed or Typed)
 Brenda Scott
 (19) TELEPHONE
 916-322-5110
 (20) DATE SIGNED
 2/28/00

PART II -- DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)

(21) SIGNATURE OF CONSULTANT
 (22) APPROVAL NUMBER
 (23) TITLE
 Job E. Fort
 (24) DATE SIGNED
 00-093

PART III -- ARCHIVAL SELECTION (Per Government Code Section 14755)

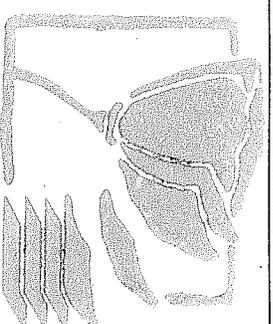
ARCHIVES USE ONLY

THE ATTACHED RECORDS RETENTION SCHEDULE:

(25) Contains no material subject to further review by the California State Archives

(26) Contains material subject to archival review. Items stamped "TRANSFER TO ARCHIVES" may not be destroyed without clearance by the Secretary of State. (Per Section 1614 of the State Administrative Manual.)

(27) SIGNATURE - CHIEF OF ARCHIVES
 (28) DATE SIGNED
 Brenda Johnson
 6/8/00



WVJ

STATE OF CALIFORNIA
RECORDS RETENTION SCHEDULE

STD. 73 (Rev. 5-92)

See instructions on reverse
 and in SAM 1600

DEPARTMENT (1) EDUCATION		SCHEDULE NUMBER (2) E00-06	DATE (3) 2/23/00
ORGANIZATIONAL UNIT Educational Planning & Information Center (EPIC)		PAGE 1	OF PAGES (4) 2
ADDRESS (Number Street City) 721 Capitol Mall, 4 th Floor, Sacramento 95814		DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5) 00-093	

ITEM NUMBER (Triple space between items) (6)	CUBIC FEET* (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS (Triple space between items) (9)	MEDIA (10)	VITAL (11)	RETENTION				PRA (Exempt) & IPA (16)	REMARKS (17)
						OFFICE (12)	DEPT. (13)	SRC (14)	TOTAL (15)		
1	1		The Educational Planning & Information Center (EPIC) is located in the Office of Policy and Evaluation. EPIC collects, verifies, and analyzes data for the creation of statistical demographics, and other related information for the Superintendent's use in planning future activities, modifying existing programs, and reporting on the condition of schools. The unit provides timely, focused, and policy-related evaluation information to the Department, State Board, Legislature, and the U.S. Department of Education. The unit is responsible for staff support for the Commission on Public Schools Accountability Act of 1999. EPIC is helping the Commission in their work on creating the Academic Performance Index (API). By June 2000, all schools in the State of California will be ranked and those rankings placed on the internet. EPIC is also helping identify eligible schools for the Immediate Intervention/Underperforming Schools Program (II/USP)								
			<u>Administrative Records:</u>								
			Time/Payroll Accounting Data	P		Active +3			Active +3		Active until employee separates, retires, transfers or terminates employment then keep for an add'l 3 years. (PR Section 6254C, IPA Sec. 1798.40)
2	5		Accounting Working Documents	P		2		5	7		Reference for new reports.
3	6		Disks/Software (Include general correspondence & reports)	M		Active 2		8	Active 10		Necessary for computer operation. Active until superseded.
4	4		Chron Files	P		Current +2			Current +2		Retain as current until revised, superseded or rescinded. Hold for reference for an add'l 2 years.
5	7		Miscellaneous Files & Reports	P		2		3	5		
			<u>Program Management Records:</u>								
6	44		Performance Reports	P	X	Active			Active		Microfilm documents at end of fiscal year and destroy originals when image is acceptable. Active until superseded.
7			Hardcopy								Stored at Elk Grove Vault.
8			Film	S	X			10	10		
			Mastersilver	D	X	2		8	10		
			Working Copy								
9	5		Performance Report Summaries	P		2		8	10		
10	2		Performance Report Comparison Groups	P		3			3		
11	.5		California Assessment Program (CAP)	P		3			3		

NOTIFY ARCHIVES

STATE OF CALIFORNIA
RECORDS RETENTION SCHEDULE

STD. 73 (Rev. 5-92)

See instructions on reverse
 and in SAM 1600

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			<u>Program Management (cont.)</u>								
12	5		High School Performance Reports	P		3			3		Keep current year hard copy only.
13	9		Academic Performance Index (API) Report	P		3			3		
14	2		Public Schools Accountability Act of 1999 Committee Records	P		3			3		
15	.5		American College Testing (ACT)	P		2		8	10		
16	1		Advance Placement (AP)	P		2		8	10		Records kept for research purposes – Perm--Director's decision and office policies
17	1.5		Summaries--Scholastic Achievement Test (SAT)	P		2		8	10		Records kept for research purposes – Perm--Director's decision and office policies
18	6		SAT and ACT Report 10-Year Summary	P		2		8	10		Records kept for research purposes – Perm--Director's decision and office policies
19	2		College Bound Report	P		2		8	10		Records kept for research purposes – Perm--Director's decision and office policies
20			<u>Records Management</u>	P							
	1		Records Retention Schedule Approval Request & Records Retention Schedule (Std. 72 & 73)			Current			Current		Retain as current.
21			Transfer List (Std. 71)			Current			Current		Retain as current until all records have been either destroyed, retired permanently, transferred to the State Archives or when no longer needed whichever is later.
22			Authorization for Records Destruction (Computer Printout)			4			4		Retain for 2 years from date of destruction. Then retain 2 more years or until audited, whichever occurs first (max. of 4 yrs.)
TOTAL	102.5										

NOTE:

E91-30:
 Item no. 5 – CHSPE Documents were transferred to the Assessment Office September 1999.
 Item no. 7—National School Recognition (Since called Blue Ribbon Program) was transferred to the Office of Policy & Evaluation.