

Behavior Data Retention Checklist

FERPA-compliant record management guide

End-of-Year Record Review

Date: _____ School Year: _____
Completed by: _____

Step 1: Sort - Official Records vs. Working Documents

Official Records (MUST RETAIN)

- & Finalized FBAs and BIPs
- & IEP documents with behavior goals
- & Formal disciplinary records
- & Progress reports sent to parents
- & Manifestation determination records

Working Documents (May Destroy)

- & Daily data collection sheets (raw data)
- & Draft FBA observations
- & Personal anecdotal notes
- & Informal communication notes

Step 2: Summarize Raw Data

- & Create summary reports from daily data sheets
- & Generate trend graphs for IEP progress
- & Document intervention effectiveness
- & Compile end-of-year behavior narratives

Step 3: Archive Official Records

- & Organize by student name and year
- & Store in district-approved secure location
- & Label with retention destruction date
- & Update access log if applicable

Retention Timeline Reference

Document Type	Typical Retention
IEP Documents	5-7 years after exit
FBA/BIP	Duration of IEP + retention period
Progress Monitoring	While enrolled + 3-5 years
Disciplinary Records	Check state law
Daily Data Sheets	Until summarized

Step 4: Secure Destruction

- & Verify no pending litigation or complaints
- & Parents notified of record destruction (FERPA requirement)
- & Paper records cross-cut shredded
- & Digital records securely deleted per IT protocols
- & Destruction logged with date and signature

Destruction Log

Documents destroyed: _____
Date: _____ Signature: _____

