



**This schedule applies to: Transit Districts and Authorities**

**Scope of records retention schedule**

This records retention schedule authorizes the destruction/transfer of public records of all local transit districts and authorities relating to functions including identification and implementation of high capacity transportation systems in accordance with chapter 81.104 RCW. It is to be used in conjunction with the *Local Government Common Records Retention Schedule (CORE)*, which authorizes the destruction/transfer of public records common to all local government agencies. *CORE* can be accessed online at: <http://www.sos.wa.gov/archives/recordsretentionschedules.aspx>.

**Disposition of public records**

Public records covered by records series within this records retention schedule must be retained for the minimum retention period as specified in this schedule. Washington State Archives strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of local resources.

Public records designated as Archival (Permanent Retention) or Non-Archival (with a retention period of "Life of the Agency" or "Permanent") must not be destroyed. Records designated as Archival (Appraisal Required) must be appraised by the Washington State Archives before disposition. Public records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such public records must be managed in accordance with the agency's policies and procedures for legal holds. Public records must not be destroyed if they are subject to an existing public records request in accordance with chapter 42.56 RCW. Such public records must be managed in accordance with the agency's policies and procedures for public records requests.

In addition to the minimum retention requirements specified in this schedule, there may be additional (longer) retention requirements mandated by federal, state and/or local statute, grant agreement, and/or other contractual obligations.

**Revocation of previously issued records retention schedules**

All previously approved disposition authorities for records that are covered by this retention schedule are revoked, including those listed in all general and agency unique retention schedules. Local government agencies should take measures to ensure that the retention and disposition of public records is in accordance with current approved records retention schedules.

**Authority**

This records retention schedule was approved by the Local Records Committee in accordance with RCW 40.14.070 on November 29, 2012.

For the State Auditor: Cindy Evans

For the Attorney General: Sharon Payant

The State Archivist: Jerry Handfield



## REVISION HISTORY

Version	Date of Approval	Extent of Revision
1.0	November 29, 2012	New sector schedule created from records series imported from version 5.2 of the <i>Local Government General Records Retention Schedule (LGRRS)</i> , which has been dismantled. All disposition authority numbers (DANs) have been assigned a prefix of "TR" and a revision number of "0" (zero). A glossary of terms is located in the <i>Local Government Common Records Retention Schedule (CORE)</i> .



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For assistance and advice in applying this records retention schedule,

please contact Washington State Archives at:

[recordsmanagement@sos.wa.gov](mailto:recordsmanagement@sos.wa.gov)

or contact your Regional Archivist.



## 1. FINANCIAL MANAGEMENT

The function of managing the local government agency's financial resources, *where not covered by CORE*.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
TR50-31-15 Rev. 0	FARE INFORMATION REFERENCE AND BACKGROUND FILES	Destroy when obsolete or superseded	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-35 Rev. 0	SALES REPORTS Periodic (daily, weekly, etc) reports of tickets, passes and other items sold.	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-39 Rev. 0	TAXI SCRIP RECEIPTS Verifies receipt of taxi scrip for sales to public.	6 years	NON-ARCHIVAL NON-ESSENTIAL OPR



## 2. HUMAN RESOURCES MANAGEMENT

The function of managing the local government agency's workforce, *where not covered by CORE*.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
TR50-31-22 Rev. 0	OPERATOR ASSIGNMENT AND SHAKE-UP RECORDS Documentation of assignment of individual operators to routes and shifts.	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-23 Rev. 0	OPERATOR INCIDENT REPORTS	6 years	NON-ARCHIVAL NON-ESSENTIAL OPR
TR50-31-14 Rev. 0	EMPLOYEE WORK SCHEDULES	1 year	NON-ARCHIVAL NON-ESSENTIAL OFM



### 3. TRANSPORTATION SYSTEMS MANAGEMENT

The function relating to the identification and implementation of high capacity transportation systems.

DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
TR50-31-01 Rev. 0	ACCESSIBLE BOARDINGS REPORTS	5 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-02 Rev. 0	AMERICANS WITH DISABILITIES ACT (ADA) CUSTOMER ELIGIBILITY FILES	6 years after termination of service or participation by customer	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-03 Rev. 0	BUS (COACH) ASSIGNMENT SHEETS	2 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-04 Rev. 0	BUS (COACH) CHANGE SHEETS	2 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-05 Rev. 0	BUS (COACH) CLEANER CHECK SHEETS	30 days	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-07 Rev. 0	BUS ROUTE SCHEDULES/TIMETABLES	Until superseded plus 3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-08 Rev. 0	BUS SHELTER HISTORY FILES Correspondence with Public Works and contractors about new shelter locations. Includes site permission for rights of way and easements.	Keep until site vacation	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-09 Rev. 0	BUS SHELTER LISTINGS Listing of shelter sights. Adopt a shelter program.	Destroy when obsolete or superseded	NON-ARCHIVAL NON-ESSENTIAL OFM



DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
TR50-31-10 Rev. 0	CUSTOMER COMMENT FILES	6 years	NON-ARCHIVAL NON-ESSENTIAL OPR
TR50-31-12 Rev. 0	DISPATCH CHANGE SHEETS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-11 Rev. 0	DISPATCH FILES Boarding and alighting, extra board weekly projections and assignments, daily work schedules extra board, bid mark-ups.	6 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-13 Rev. 0	DISPATCH LOGS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-17 Rev. 0	LOST AND FOUND REPORTS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-18 Rev. 0	MARKETING AND PROMOTION PROJECT FILES Reference materials relating to transit promotion.	Completion of project plus 3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-19 Rev. 0	MISSED TRIP LOGS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-20 Rev. 0	ON-TIME PERFORMANCE REPORTS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-21 Rev. 0	OPERATIONS REPORTS Daily, weekly or other periodic reports summarizing transit system operations.	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM



DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
TR50-31-24 Rev. 0	OPERATOR PRE/POST-SHIFT INSPECTION REPORTS Reports of operators' inspections of buses at the beginning and end of their shifts.	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-25 Rev. 0	PARATRANSIT MANIFESTS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-26 Rev. 0	PARATRANSIT SERVICE HISTORY FILES OR DATABASE MANIFESTS	Destroy when obsolete or superseded	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-27 Rev. 0	PROPERTY APPRAISAL MANIFESTS FILES	Destroy when obsolete or superseded plus 6 years	NON-ARCHIVAL NON-ESSENTIAL OPR
TR50-31-43 Rev. 0	RADIO DISPATCH RECORDINGS Recordings of dispatch radio messages to and from transit operators.	90 days	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-28 Rev. 0	RADIO LOGS MANIFESTS	90 days	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-29 Rev. 0	RIDEMATCHING PARTICIPANT INFORMATION Information maintained for each participant.	Destroy when obsolete or superseded	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-30 Rev. 0	RIDERSHIP REPORTS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM





DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
TR50-31-31 Rev. 0	ROAD CALL REPORTS	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-32 Rev. 0	ROUTE CHANGE FILES Correspondence and working papers regarding route changes.	3 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-33 Rev. 0	ROUTE HISTORY DOCUMENTATION	Life of the route	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-34 Rev. 0	ROUTE MAINTENANCE FILES Check sheets used to record needed improvements in the route (actual physical improvements).	Destroy when obsolete or superseded	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-36 Rev. 0	SERVICE AREA ANNEXATION PLANS	6 years	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-37 Rev. 0	SERVICE PERFORMANCE EVALUATIONS	1 year	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-38 Rev. 0	SERVICE PLANNING AND DEVELOPMENT FILES	Destroy when obsolete or superseded	NON-ARCHIVAL NON-ESSENTIAL OFM
TR50-31-40 Rev. 0	TRANSIT PLANNING REFERENCE FILES Files containing surveys, statistics, and correspondence used for future planning in transit.	Destroy when obsolete or superseded – Potential archival value	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OFM



DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
TR50-31-41 Rev. 0	TRIENNIAL REVIEW AUDITS	3 years after submittal of quarterly, annual or final expenditure report	<b>ARCHIVAL</b> (Appraisal Required) NON-ESSENTIAL OPR
TR50-31-42 Rev. 0	VANPOOL MONTHLY REPORTS	Termination of pool plus 6 years	NON-ARCHIVAL NON-ESSENTIAL OPR



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