



Washington

Secretary of State

SAM REED

**GENERAL RECORDS RETENTION SCHEDULE
FOR**

**ALL LOCAL GOVERNMENT AGENCIES
IN WASHINGTON STATE**

Published by the Washington State Archives

SUPERSEDED

**Approved by the Washington State Local Records
Committee**

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ACCOUNTING

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

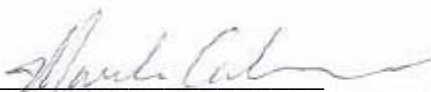
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
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ACCOUNTING

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ACCOUNTS PAYABLE AND RECEIVABLE SUPPORTING DOCUMENTS AND REPORTS Specialized reports and background files documenting the status of or adjustments to accounts.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-02	
2	ACCOUNTS PAYABLE CONTROL WORKSHEET Lists invoice totals and taxes. Used to balance against computer generated warrant register. New Series – 06/03	OFM	1 month	Destroy when obsolete or superseded	GS51-02-01	
3	ANNUAL ESTIMATE OF REVENUE AND EXPENDITURES	OFM	2 years	Destroy when obsolete or superseded	GS50-03D-01	
4	ANNUAL FINANCIAL STATUS REPORTS - GRANTS Annual report submitted for continuing grants containing summaries and breakdowns of expenditures for the past year.	OFM	3 years or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	GS50-03C-01	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
5	ANNUAL REPORT OF CHIEF FISCAL OFFICER TO COMMISSIONERS/COUNCIL Includes annual financial reports compiled by all units of local government as per statute, charter, and agency policy.	OFM	Clerk of governing council, commission or board - PERMANENT - 1 copy archival - See remarks	Destroy when obsolete or superseded	GS50-03D-02	Contact your Regional Archivist - one copy of each available report should be assembled for transfer to Regional Archives.
6	APPLICATION FOR DUPLICATE INSTRUMENT, AFFIDAVIT, AND BOND Authority to issue duplicated check or warrant in case of loss or destruction. Notarized oath that original was lost or destroyed and request for replacement.	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-10	
7	AUDIT SUBJECT/REFERENCE FILES Cumulative data on departments and audit issues.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-03F-01	
8	AUTHORIZATION FOR PAYROLL DEDUCTIONS	OPR	Termination of authorization plus 6 years	Destroy when obsolete or superseded	GS50-03E-01	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
9	BANK ACCOUNT RECONCILIATIONS	OFM	3 years	Destroy when obsolete or superseded	GS50-03B-01	
10	BANK DEPOSIT RECORDS Includes passbooks and deposit slips for both checking and savings accounts in all locations.	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-02	
11	BANK STATEMENTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-03	
12	BENEFIT DETAIL REPORTS - PAYROLL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-02	
13	BILLING STATEMENTS (CARDS) – UTILITIES ACCOUNTING Statements of money due for utility services, including amount due, balance, account number, and customer's name.	OPR	6 years	Destroy when obsolete or superseded	GS55-05B-01	
14	BILLING STUBS - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-02	
15	BILLING SUMMARIES (REGISTERS) - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-03	
16	BILLS OF SALE	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-04	
17	BUDGET DEVELOPMENT OR WORKING FILES Background information and draft documents compiled in the course of budget preparation.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-03D-03	
18	BUDGET FORECAST REPORTS	OFM	1 year	Destroy when obsolete or superseded	GS50-03D-04	
19	BUDGET OFFICER'S MONTHLY REPORT TO GOVERNING COUNCIL, COMMISSION, OR BOARD	OPR	6 years	Destroy when obsolete or superseded	GS50-03D-05	
20	BUDGET STATUS REPORT Includes all types of periodic budget status reports compiled by all units of local government as per statute, charter, or agency policy.	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-03D-06	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
21	CANCELLED/SUBSTITUTE CHECKS/ WARRANTS Per the Check Clearing for the 21 st Century Act, substitute checks will replace the hard copy of cancelled check/warrant. Series revised – Added “Substitute” to title, added description and reference in Remarks Column – 09/04	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-04	Reference UCC Section 4-406(b).
22	CASH ACCOUNTS SUPPORTING DOCUMENTS AND REPORTS Documentation of status and adjustments to cash accounts.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-06	
23	CASH BOOK	OFM	6 years	Destroy when obsolete or superseded	GS50-03B-05	
24	CASH RECEIPTS TRANSMITTALS Forms transmitting money to and from the agency.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-07	
25	CASH RECEIPTS TRANSMITTALS-INTERNAL Forms transmitting money within the agency.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-08	
26	CHECK STUBS OR DUPLICATE COPIES	OFM	3 years	Destroy when obsolete or superseded	GS50-03B-06	
27	COLLECTION AGENCY REPORTS - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-04	
28	COLLECTION FILES Documents efforts to collect payment on outstanding invoices, or on checks returned because of insufficient funds. May include past due statements, penalty calculations, copies of invoices, correspondence, logs of collections actions, write-off lists, and supporting documentation New Series – 07/03	OPR	Account closed plus 6 years	Destroy when obsolete or superseded	GS50-03B-14	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
29	CONSOLIDATED OMNIBUS BUDGET RECONCILIATION ACT (COBRA) EXTENSION NOTICE AND ELECTION FORMS Document extension of health care benefit coverage upon termination of employment or other qualifying event.	OPR	6 years	Destroy when obsolete or superseded	GS50-03E-03	
30	CUSTOMER ACCOUNT ADJUSTMENT FILES - UTILITIES ACCOUNTING Includes applications for low income/senior discount/rate reduction.	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-05	
31	CUSTOMER ACCOUNT INDEX - UTILITIES ACCOUNTING	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS55-05B-06	
32	CUSTOMER BILLING DISPUTE CASES Files document cases regarding billing disputes which cannot be resolved by utility administration. Resolution determined by settlement or by formal decision maker such as hearing examiner, etc. Case files include name of customer, disputed issue, dispute discussion notes, billing and account information. Revised – Description revised to include “resolution determined by settlement...” – 10/04	OPR	Resolution plus 6 years	Destroy when obsolete or superseded	GS55-05B-30	
33	CUSTOMER CREDIT FILES - UTILITIES ACCOUNTING	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS55-05B-07	
34	DAILY CASH REPORT OR SUMMARY	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-09	
35	DELINQUENT ACCOUNT LISTS - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-08	
36	DEPARTMENTAL BUDGET REQUESTS	OFM	2 years	Destroy when obsolete or superseded	GS50-03D-07	
37	DEPOSIT RECEIPTS - UTILITIES ACCOUNTING	OPR	6 years	Destroy when obsolete or superseded	GS55-05B-09	
38	DEPOSIT REGISTER - UTILITIES ACCOUNTING	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-02	
39	DESIGNATION OF BANK OR OTHER DEPOSITORY FOR AGENCY FUNDS	OFM	6 years after withdrawal of designation	Destroy when obsolete or superseded	GS50-03B-07	

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40	DIRECT PAYROLL DEPOSIT AUTHORIZATION	OFM	Until transferred to cancellation file	Destroy when obsolete or superseded	GS50-03E-05	
41	DIRECT PAYROLL DEPOSIT AUTHORIZATION CANCELLATION	OFM	4 years	Destroy when obsolete or superseded	GS50-03E-06	
42	DIRECT PAYROLL DEPOSIT ENROLLEES DETAIL DATA	OFM	1 year	Destroy when obsolete or superseded	GS50-03E-07	
43	DIRECT PAYROLL DEPOSIT HASH SHEET	OFM	1 year	Destroy when obsolete or superseded	GS50-03E-08	
44	DIRECT PAYROLL DEPOSIT PRE-NOTE DATA	OFM	1 year	Destroy when obsolete or superseded	GS50-03E-09	
45	DIRECT PAYROLL DEPOSIT TRANSMITTAL LISTINGS	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-10	
46	DISABILITY, HEALTH AND WELFARE CLAIMS - EMPLOYEE	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	GS50-03E-11	
47	DISCONNECTION NOTICES - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-11	
48	DISTRIBUTION OF EXPENDITURES	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-10	
49	ELECTRIC UTILITY ADVERTISEMENTS File copies of advertisements for service provided by electric utilities as individual entities or as part of a larger group.	OPR	6 years - See remarks	Destroy when obsolete or superseded	GS55-05B-13	Reference Code of Federal Regulations 18CFR125.3 66(a), National Association of Regulatory Utility Commissioners NARUC 66 (a).
50	ELECTRIC UTILITY COST OF SERVICE REPORT Filed under section 133 of the Public Utilities Regulatory Policies Act (PURPA).	OPR	5 years - See remarks	Destroy when obsolete or superseded	GS55-05B-14	Reference Code of Federal Regulations 18CFR125.33 65(d).
51	ELECTRIC UTILITY GENERAL AND SUBSIDIARY LEDGERS, JOURNALS, AND INDEXES Ledgers, journals, and indexes documenting funds and functions relating to the finances of electric utilities. ESSENTIAL RECORD - Needs security microfilm backup - See remarks. Revised: Reduced retention from 50 years and corrected CFR citations in remarks – 07/03	OPR	10 years - See remarks	Destroy when obsolete or superseded	GS55-05B-12	Reference Code of Federal Regulations 18CFR125.3 (6a), National Association of Regulatory Utility Commissioners NARUC 10(a)(1), NARUC 10(b)(1) and NARUC 11. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives standards.

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52	ELECTRIC UTILITY PLANT LEDGERS <i>New series – 07/03</i>	OPR	25 years – See remarks	Destroy when obsolete or superseded	GS55-05B-28	Regulations 18CFR125.3.(16a)
53	EMPLOYEE EARNINGS QUARTERLY REPORTS <i>Series deleted – Covered under Internal Revenue Service (IRS) Forms</i>	OFM	4 years	Destroy when obsolete or superseded	GS50-03E-12	
54	EXPENDITURE TRANSACTION REPORTS Adjustments to coding of expenditures and correcting errors.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-11	
55	FINAL BUDGET	OFM	Clerk of governing council, commission or board - PERMANENT - 1 copy archival - See remarks	Destroy when obsolete or superseded	GS50-03D-08	Contact your Regional Archivist - one copy of each available report should be assembled for transfer to Regional Archives.
56	FINAL CLOSURE OF ACCOUNT SCHEDULES - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-15	
57	FINAL GRANT EXPENDITURE REPORT End of a project report accounting for the expenditure of grant funds submitted for non-continuing grants.	OFM	3 years from the date of submission of final report or retain for period required by grant or program – Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-03C-02	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
58	FINANCIAL STATEMENTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03D-09	

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59	FINANCIAL SUPPORT DOCUMENTS - CONTINUING GRANTS Working papers, such as summaries, spread sheets and other data reflecting the expenditures of grant fund.	OFM	3 years or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	GS50-03C-03	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
60	FINANCIAL SUPPORT DOCUMENTS - NON-CONTINUING GRANTS Working papers, such as summaries, spreadsheets, and other data reflecting the expenditure of grant funds.	OFM	3 years from the date of submission of the final expenditure report or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	GS50-03C-04	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
61	FISCAL AND PERFORMANCE AUDIT REPORTS Final report of audit findings.	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-03F-02	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
62	FIXED ASSETS INVENTORY DOCUMENTATION Includes fixed asset inventory (year-end) as well as documentation of current status and updates and adjustments to the fixed asset inventory. Revised: Added CFR reference to remarks – 07/03	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-12	For Electric Utilities, reference 18CFR 125.3(20a).
63	FUND ACCOUNTS SUPPORTING DOCUMENTS AND REPORTS Documentation of status and adjustments to individual funds.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-13	
64	GENERAL AND SUBSIDIARY JOURNALS All journals for all funds and functions, including but not limited to: cash disbursements and cash receipts.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-14	

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65	GENERAL LEDGER ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	6 years Pre-1900 general ledgers have potential archival value - See remarks	Destroy when obsolete or superseded	GS50-03A-15	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. Accounting system documentation should be protected from damage or loss by off site storage of backup tapes. In non-automated systems, security copies of the general ledger and other official accounting documents should be stored off site, or a list that identifies the locations of other copies inside and outside the agency should be kept.
66	GRANT AGREEMENT Official statement of the terms and conditions of the grant agreed upon and signed by the grantor and the grantee.	OPR	3 years from the date of submission of the final expenditure report or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	GS50-03C-05	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
67	GRANT APPLICATIONS - NOT APPROVED	OFM	1 year	Destroy when obsolete or superseded	GS50-03C-07	
68	GRANT APPLICATIONS - APPROVED Includes narrative explanation of the nature and purpose of the proposed project, amount of funds requested, matching funds, in-kind contributions, and plan of work.	OPR	3 years from the date of submission of the final expenditure report or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	GS50-03C-06	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
69	GRANT PROJECT REPORTS Statement on progress, problems, and success in the completion of the grant project, including periodic, annual, special, and final reports.	OPR	3 years from the date of submission of the final expenditure report or retain for period required by grant or program – Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-03C-09	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
70	GRANT PROJECT WARRANTS, CHECKS, AND VOUCHERS	OPR	6 years or until satisfaction of grant audit requirements, whichever is longer	Destroy when obsolete or superseded	GS50-03C-08	
71	GRANTS - STATISTICAL DOCUMENTATION	OFM	3 years from the date of submission of the final expenditure report or retain for period required by grant or program - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-03C-10	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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72	INDIVIDUAL EMPLOYEE PAY HISTORY May be used for verification of eligibility for retirement benefits. ESSENTIAL RECORD if used for retirement verification – Needs security microfilm backup – See remarks.	OPR OFM	If used for retirement verification – 60 years If NOT used for retirement verification – 3 years See remarks	Destroy when obsolete or superseded	GS50-03E-15	Either the individual employee pay history or the payroll register must be kept for long-term verification of retirement eligibility. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
73	INTERNAL REVENUE SERVICE (IRS) FORMS 1099 - INT 941 - Employer's Quarterly Return W-2 - Employer's Copies of Federal Withholding Tax Statement W-4 - Employees Withholding Exemption Certificates W-9 - Request for Taxpayer ID Number and Certification Series revised – Combined IRS forms into one series - 05/02	OFM	4 years	Destroy when obsolete or superseded	GS50-03A-17	
74	INVENTORY OF FIXED ASSETS Year-end report.	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-03A-18	
75	INVESTMENT ACCOUNTS SUPPORTING DOCUMENTS AND REPORTS Documentation of status and adjustments to investment accounts.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-19	

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ACCOUNTING

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
76	JOURNAL VOUCHERS AND INDEXES FOR ELECTRIC UTILITIES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years - See remarks	Destroy when obsolete or superseded	GS55-05B-17	Reference Code of Federal Regulations 18CFR125.3 12(a), National Association of Regulatory Utility Commissioners NARUC 12(a). The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives standards.
77	LABOR AND INDUSTRIES REPORT ON PAYROLL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-16	
78	LEAVE BUY-BACK ACCEPTANCE FORMS	OPR	6 years	Destroy when obsolete or superseded	GS50-03E-17	
79	LEAVE SHARING AUTHORIZATION	OPR	6 years	Destroy when obsolete or superseded	GS50-03E-18	
80	LISTINGS OF PAYROLL DEDUCTIONS Includes medical insurance.	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-03E-19	
81	LOW INCOME/SENIOR CITIZEN DISCOUNT/TAX EXEMPTION APPLICATIONS - UTILITIES ACCOUNTING	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS55-05B-27	
82	MEDICAL INSURANCE REPORTS - PAYROLL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-20	
83	METER BOOKS - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-18	
84	METER READING CARDS - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-19	
85	NON-SUFFICIENT FUNDS (NSF) CHECKS/ WARRANTS New series - 04/02	OPR	Settlement or closure plus 6 years	Destroy when obsolete or superseded	GS50-03B-12	
86	OLD AGE SECURITY INSURANCE (OASI) REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-21	
87	PAYROLL OR EXPENSE CHECKS LOG/SHEET Log or sheet that is signed by person picking up payroll or expense checks.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-32	

**GENERAL RECORDS RETENTION SCHEDULE FOR
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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
88	PAYROLL REGISTER May be used for verification of eligibility for retirement benefits. ESSENTIAL RECORD if used for retirement verification – Needs security microfilm backup – See remarks.	OPR OFM	If used for retirement verification – 60 years If NOT used for retirement verification – 3 years See remarks	Destroy when obsolete or superseded	GS50-03E-22	Either the individual employee pay history or the payroll register must be kept for long-term verification of retirement eligibility. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
89	PETTY CASH RECORD	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-20	
90	PRELIMINARY BUDGETS	OFM	2 years	Destroy when obsolete or superseded	GS50-03D-10	
91	RATE AND BILLING SYSTEM DEVELOPMENT DOCUMENTATION - UTILITIES ACCOUNTING Service rate calculations and documentation on billing and collection systems.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS55-05B-20	
92	RATE AND COLLECTION SYSTEM REVISION NOTICES - UTILITIES ACCOUNTING Notices to customers of changes in billing rates and collection policies and procedures.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS55-05B-21	
93	RATE SCHEDULES - UTILITIES ACCOUNTING Revised: Added CFR citation to remarks – 07/03	OPR	Clerk of governing council, commission or board - PERMANENT - 1 copy archival - See remarks	Destroy when obsolete or superseded	GS55-05B-22	Reference 18CFR125.3(30). Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
94	RECEIPTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-21	
95	RECORD OF SUPPLIES DRAWN FROM CENTRAL STORES	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-22	
96	RECORDS OF ATTACHMENTS OR GARNISHMENTS OF SALARIES OR WAGES	OPR	Satisfaction plus 6 years	Destroy when obsolete or superseded	GS50-03E-23	

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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
97	REGISTER FOR FUNDS REMITTED TO FISCAL OFFICER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-23	
98	REMITTANCE ADVICES	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-24	
99	REVENUE BOND AND COUPON REGISTER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-05	
100	REVENUE BONDS AND COUPONS Includes general obligation bonds.	OPR	6 years after redemption.	Destroy when obsolete or superseded	GS50-03A-25	
101	SERVICE APPLICATIONS - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-24	
102	SERVICE ORDERS - UTILITIES ACCOUNTING	OPR	6 years	Destroy when obsolete or superseded	GS55-05B-25	
103	SIGNATURE RECORDS List of employees and their signatures which are authorized to sign checks/warrants.	OPR	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS50-03B-11	
104	STATE AUDITOR'S EXAMINATION REPORT	OFM	State Auditor's office - PERMANENT	Destroy when obsolete or superseded	GS50-03A-26	
105	STATE DEPARTMENT OF RETIREMENT SYSTEMS APPLICATIONS AND REPORTS New Series - 06/03	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-29	
106	STATE EMPLOYEES RETIREMENT TRANSMITTAL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-24	
107	STATEMENTS OF BOND OR OTHER COLLATERAL SECURITY POSTED BY BANK (Or other depository)	OFM	3 years	Destroy when obsolete or superseded	GS50-03B-09	
108	STOP PAYMENT REPORTS Report submitted to stop the payment on a particular check. Usually for lost or stolen salary or pension checks. Includes form granting stop payment from individual, supporting documentation, etc. New Series - 06/03	OPR	Calendar year plus 6 years	Destroy when obsolete or superseded	GS50-03B-13	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
109	SUBSIDIARY LEDGERS All ledgers dedicated to individual funds or functions, including but not limited to: accounts payable, accounts receivable, appropriations, bonded debt, equipment operation cost, expenditures, investments, properties, and revenue.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-01	
110	SUPPORTING DOCUMENTS AND REPORTS - PAYROLL Documentation of status of and adjustments to payroll accounts.	OFM	3 years or until completion of audit	Destroy when obsolete or superseded	GS50-03E-25	
111	TECHNICAL REFERENCE MATERIALS – INTERNAL AUDIT Audit related publications and documents gathered for reference.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-03F-03	
112	TIME CARDS/TIME SHEETS Daily, weekly, or monthly time accumulation reports. May be used as retirement verification. ESSENTIAL RECORD if used for retirement verification – Needs security microfilm backup – See remarks. Series revised – Added last paragraph to retention column - 05/03	OPR OFM	If used for retirement verification – 60 years If NOT used for retirement verification – 3 years See remarks Time records subject to federal audit should be retained per federal requirements.	Destroy when obsolete or superseded	GS50-03E-04	Retain for 60 years if employee pay histories or payroll registers are not used for retirement verification. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
113	TREASURER/FINANCE OFFICER FINANCIAL REPORTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-27	
114	TRIAL BALANCES	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-28	
115	UNCOLLECTABLE ACCOUNT LISTS - UTILITIES ACCOUNTING	OFM	3 years	Destroy when obsolete or superseded	GS55-05B-26	
116	UTILITY CUSTOMER DEPOSIT LISTING Listing of customers that have a security deposit on their accounts because of past account issues of non-payment. Includes name, account number, deposit amount, etc. New Series – 10/04	OPR	Termination of account plus 6 years	Destroy when obsolete or superseded	GS55-05B-29	
117	VOUCHER REGISTER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-29	

**GENERAL RECORDS RETENTION SCHEDULE FOR
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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
118	VOUCHERS All invoices for all funds and purposes with attached supporting documentation. Includes Travel Vouchers/Authorizations.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-30	
119	WARRANT / CHECK REGISTERS	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-31	
120	WARRANT, CHECK, OR VOUCHER REGISTERS – GRANT FUNDS Numerical listing of checks, warrants, and vouchers from transactions involving grant funds.	OPR	6 years or until satisfaction of grant audit requirements, whichever is longer	Destroy when obsolete or superseded	GS50-03C-11	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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RECORDS CATEGORY: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

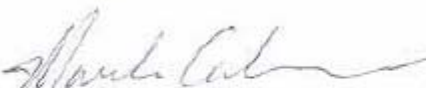
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
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ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ADMINISTRATIVE PROCEDURES AND INSTRUCTIONS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-01	
2	ADMINISTRATIVE WORKING FILES Subject files containing informational copies of various records organized by issue, person, subject, or other areas of interest.	OFM	Destroy when obsolete or superseded - elected official, executive and department head files are potentially archival - See remarks	Destroy when obsolete or superseded	GS50-01-02	Contact your Regional Archivist before disposing of elected official, executive, or department head files. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
3	ANNUAL REPORTS – OFFICE REFERENCE COPIES Copies of reports of activities submitted yearly to the governing council, commission, or board.	OFM	Clerk of governing council, commission, or board keeps primary copy PERMANENT - 1 copy archival - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-05A-04	Contact your Regional Archivist. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
4	APPLICATION FOR EMPLOYMENT WHEN APPLICANT IS NOT HIRED – OFFICE REFERENCE COPIES Copies of employment applications submitted by applicants who were not hired.	OFM	Personnel office keeps primary copy 3 years	Office references copies - Destroy when obsolete or superseded	GS50-04B-01	
5	APPOINTMENT CALENDARS	OFM	Destroy when obsolete or superseded – See remarks	Destroy when obsolete or superseded	GS50-01-36	Elected officials and department heads may want to retain appointment calendars to document activities and appointments for a longer period of time.
6	BIOGRAPHICAL FILES ON AGENCY OFFICIALS AND STAFF – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-01	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
7	BUDGET AND BUDGET DEVELOPMENT FILES – OFFICE REFERENCE COPIES The final budgets are retained permanently as reference attachments to the ordinances or resolutions that adopt them.	OFM	Final budget is kept by clerk of governing council, commission, or board PERMANENT Budget development and request files are retained 2 years by the finance or budget office	Office references copies - Destroy when obsolete or superseded	GS50-03D-03	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
8	CENSUS RECORDS FROM THE STATE OFFICE OF FINANCIAL MANAGEMENT	OFM	The State Office of Financial Management keeps primary copy PERMANENT	Destroy when obsolete or superseded - Potential archival value - See remarks	GS50-01-37	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
9	CHRONOLOGICAL REFERENCE FILE Also known as reading or day file. Used as a chronological reference source supplemental to correspondence and subject reference files.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-08	
10	CITIZENS' COMPLAINTS/REQUESTS	OFM	3 years	Destroy when obsolete or superseded	GS50-01-09	
11	CLAIMS FOR DAMAGES	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	GS50-01-10	
12	CONTRACTS, AGREEMENTS, AND WARRANTIES	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-01-11	
13	CORRESPONDENCE Letters and attached materials sent and received during the course of agency business.	OFM	2 years - elected official, executive, and department head files are potentially archival - See remarks	Destroy when obsolete or superseded	GS50-01-12	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
14	DOMESTIC PARTNERSHIP REGISTRATION DOCUMENTATION Notarized application signed by both applicants that wish to register a domestic partnership, accompanied by a registration fee. May include certificate and termination form. (New Series - May 2002)	OFM	3 years plus next audit	Destroy when obsolete or superseded	GS50-01-40	
15	FINANCIAL REPORTS – OFFICE REFERENCE COPIES Copies of financial reports made to and/or by the department regarding its, expenditures and the status of its budget.	OFM	3 years or until completion of State Auditor's examination report	Office references copies - Destroy when obsolete or superseded	GS50-3D-06	
16	FISCAL, PURCHASE AND RECEIVING DOCUMENTS	OFM	Finance or Purchasing Office keeps primary copies 6 years	Destroy when obsolete or superseded	GS50-01-17	

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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
17	GOVERNING COUNCIL, COMMISSION, AND BOARD MEETING AGENDAS/PACKETS – OFFICE REFERENCE COPIES	OFM	Clerk of governing council, commission or board keeps primary copy 3 years	Office references copies - Destroy when obsolete or superseded	GS50-05A-03	
18	GOVERNING COUNCIL, COMMISSION, COMMITTEE, AND BOARD MINUTES – OFFICE REFERENCE COPIES	OFM	Clerk of governing council, commission or board keeps primary copy PERMANENT	Office references copies - Destroy when obsolete or superseded	GS50-05A-13	
19	HISTORICAL FILES OF THE AGENCY – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-02	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
20	LEGAL OPINIONS – OFFICE REFERENCE COPIES	OFM	Agency attorney keeps primary copy PERMANENT - See remarks	Office references copies - Destroy when obsolete or superseded	GS53-02-03	If the agency contracts for outside legal representation, the primary record copy will probably be held by agency's executive administration.
21	LITIGATION FILES – OFFICE REFERENCE COPIES	OFM	Legal office or executive administration keeps until case closed plus 10 years - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS53-02-04	Primary copies of official court documents are held permanently by the Clerk of Superior Court, or 10 years by the District or Municipal Court Administrator. Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
22	MAILING LISTS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-21	
23	MASTER FILE OF AGENCY PUBLICATIONS – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-04	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
24	NEWSPAPER CLIPPINGS – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-05	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
25	OFFICIAL AGENCY POLICY AND PROCEDURE DIRECTIVES, REGULATIONS, AND RULES ESSENTIAL RECORD - Needs security microfilm backup - See remarks. (See item #1 for administrative procedures and instructions).	OPR	PERMANENT as adopted - One copy archival - See remarks	Destroy when obsolete or superseded	GS50-01-24	Contact your Regional Archivist before destroying the original record. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
26	ORDINANCE AND RESOLUTION DEVELOPMENT FILES Documentation of the analysis and development of ordinances and/or resolutions submitted for the approval of the agency's governing council, commission, or board.	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-25	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
27	ORDINANCES AND RESOLUTIONS – OFFICE REFERENCE COPIES	OFM	Clerk of the governing council, commission, committee, or board keeps primary copy PERMANENT	Office references copies - Destroy when obsolete or superseded	GS50-05A-16	
28	PAYROLL REPORTS – OFFICE REFERENCE COPIES	OFM	Payroll office keeps primary copy- 3 years, OR 60 years if needed for retirement audit	Office references copies - Destroy when obsolete or superseded	GS50-03E-25	
29	PERSONNEL FILES – OFFICE REFERENCE COPIES	OFM	Personnel office keeps primary copy until termination of employment plus 6 years	Office references copies - Destroy when obsolete or superseded	GS50-04B-06	
30	PHOTOGRAPHS AND OTHER AUDIO VISUAL MATERIAL – OFFICE REFERENCE COPIES Photographic negatives may be held in the Regional Archives for permanent preservation and security backup - See remarks.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-06	Contact your Regional Archivist before disposing of this record or to discuss transfer of negatives for permanent preservation and security backup.

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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
31	PRESS RELEASES – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-07	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
32	PROJECT FILES (MISCELLANEOUS) New series 05/02	OPR	Completion of Project plus 6 years -Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-39	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
33	PUBLIC DISCLOSURE LOBBYIST REPORTING Quarterly reports to the Washington State Public Disclosure Commission relating to lobby activities by the agency. Used to document lobby activities with RCW 42.17. May include Public Disclosure forms L-5 or their electronic equivalent. New Series-07/03	OPR	6 years	Destroy when obsolete or superseded	GS50-01-41	
34	PUBLIC OPINION POLLS	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-30	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
35	RECEIPTS FOR CASH RECEIVED – OFFICE REFERENCE COPIES	OFM	Finance office keeps primary copy 6 years	Office references copies - Keep 3 years	GS50-03A-21	
36	REQUESTS FOR LEAVE/OVERTIME	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-09	
37	RESEARCH/PROGRAM REPORTS, STUDIES, SURVEYS, MODELS, AND ANALYSES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-32	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

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ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
38	SCRAPBOOKS AND ALBUMS	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-08	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
39	SPEECHES BY OFFICIALS AND STAFF REPRESENTING THE AGENCY – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-09	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
40	SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04B-30	
41	TELEPHONE LOGS AND USAGE DETAIL REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-01-35	
42	WORK PLANS Plan of an agency's actions for the coming year. Documents agency, section, or program timelines and areas of responsibility to specific actions. New Series – 01/02	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-38	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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ADMINISTRATIVE MATERIALS WITH NO RETENTION VALUE

THE FOLLOWING TYPES OF MATERIALS ARE DESIGNATED AS HAVING NO PUBLIC RECORD RETENTION VALUE AND MAY BE DISPOSED OF AS SOON AS THEY HAVE SERVED THEIR PURPOSE:

ITEM NO.	TITLE AND DESCRIPTION
1	<p>AGENCY PUBLICATIONS Supplies of agency publications, forms, and printed documents which are superseded, outdated, or otherwise valueless, EXCEPT FOR ACCOUNTABLE FORMS WHICH MUST BE EXAMINED BY THE STATE AUDITOR'S OFFICE BEFORE BEING DESTROYED. Agency publications may be given away to the public or other agencies rather than being destroyed.</p>
2	<p>CATALOGS, TRADE JOURNALS, VIDEOS, AND OTHER PRINTED OR PUBLISHED MATERIALS Received from other offices, commercial firms, or private institutions, which require no action and are not needed for documentary purposes.</p>
3	<p>INFORMATIONAL COPIES Electrostatic, photocopy, magnetic, or other type of copy of correspondence, completed forms, bulletins, etc., prepared for reference and informational distribution.</p>
4	<p>LETTERS OF TRANSMITTAL Letters of transmittal, which do not add any information to the transmitted materials.</p>
5	<p>MISCELLANEOUS MEMORANDA Miscellaneous notices or memoranda which do not relate to the functional responsibility of the agency, e.g., notices of community affairs, employees meetings, holidays, etc.</p>
6	<p>PRELIMINARY DRAFTS Preliminary drafts of letters, memoranda, reports, worksheets, and informal notes, which do not represent significant basic steps in the preparation of record documents.</p>
7	<p>REPRODUCTION MATERIALS Includes materials such as stencils, hectograph masters and offset plates.</p>
8	<p>ROUTING SLIPS Routing slips used to direct the distribution of documents.</p>
9	<p>SHORTHAND NOTES, STENOTYPE TAPES, WORD PROCESSING DISKS, AND MECHANICAL RECORDINGS After they have been transcribed into typewritten or printed form on paper or microfilm.</p>
10	<p>TELEPHONE MESSAGES "While you were away" slips, check slips, or similar forms used to convey non-policy informational messages. Materials containing personal information should be disposed of in a secure manner.</p>
11	<p>USED / CANCELLED EVENT TICKETS AND PASSES</p>

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ADVISORY COUNCILS, COMMISSIONS, COMMITTEES AND BOARDS

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

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These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ADVISORY COUNCILS, COMMISSIONS, COMMITTEES, AND BOARDS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	AGENDA PACKETS – ADVISORY COUNCILS, COMMISSIONS, COMMITTEES, AND BOARDS. Includes all referenced and attached documents.	OFM	3 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-05B-02	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	AUDIO/VIDEO TAPE RECORDINGS OF MEETINGS – ADVISORY COUNCILS, COMMISSIONS, COMMITTEES, AND BOARDS	OFM	Keep until approval of written minutes	Destroy when obsolete or superseded	GS50-05B-05	
3	CORRESPONDENCE – ADVISORY COUNCILS, COMMISSIONS, COMMITTEES, AND BOARDS	OFM	2 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-12	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
4	MINUTES – ADVISORY COUNCILS, COMMISSIONS, COMMITTEES, AND BOARDS Includes all references and attached documents.	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05B-04	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	REPORTS SUBMITTED TO GOVERNING COUNCIL, COMMISSION, COMMITTEE, BOARD, OR EXECUTIVE BY THE ADVISORY COUNCILS, COMMISSIONS, COMMITTEES, AND BOARDS	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05B-03	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ANIMAL SERVICES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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SUPERSEDED

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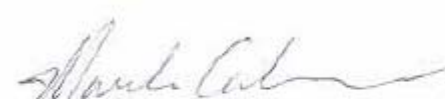
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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ANIMAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	BITE REPORTS – ANIMAL CONTROL	OFM	3 years	Destroy when obsolete or superseded	GS50-10B-01	
2	BOARD OF PHARMACY REGISTRATION Registration required by Washington State Board of Pharmacy to designate an individual responsible for the ordering, possession, safe storage, and utilization of approved legend drugs. New series – 04/03	OFM	Until issuance of new registration	Destroy when obsolete or superseded	GS50-10B-21	Reference WAC 246-887-050, RCW 69.41.080, and RCW 69.50.310.
3	BOOKING CARDS – ANIMAL CONTROL	OFM	Release, placement, or disposal, plus 1 year	Destroy when obsolete or superseded	GS50-10B-02	
4	CITATIONS – ANIMAL CONTROL	OPR	6 years	Destroy when obsolete or superseded	GS50-10B-07	
5	COMPLAINTS – ANIMAL CONTROL	OFM	3 years	Destroy when obsolete or superseded	GS50-10B-08	
6	CONTROLLED SUBSTANCE INVENTORY Inventory of all controlled substances in the possession of the registrant. New series – 04/03	OFM	Anniversary of issuance of registration plus 2 years	Destroy when obsolete or superseded	GS50-10B-18	Reference 21CFR1304.04(a) and WAC 246-887-200.
7	CONTROLLED SUBSTANCE ORDER FORMS An order form supplied by the Federal Drug Enforcement Administration, required for the ordering and distribution of certain controlled substances. New series – 04/03	OFM	Receipt of order plus 2 years	Destroy when obsolete or superseded	GS50-10B-20	Reference 21CFR1305.01 and 21CFR 1305.13.
8	DISPOSAL NOTICE – ANIMAL CONTROL	OFM	2 years	Destroy when obsolete or superseded	GS50-10B-04	
9	INVESTIGATION REPORTS NOT RESULTING IN CITATIONS - ANIMAL CONTROL	OFM	3 years	Destroy when obsolete or superseded	GS50-10B-10	
10	INVESTIGATION REPORTS RESULTING IN CITATIONS – ANIMAL CONTROL	OPR	6 years	Destroy when obsolete or superseded	GS50-10B-09	
11	KENNEL LICENSES – ANIMAL CONTROL	OPR	Expiration plus 6 years	Destroy when obsolete or superseded	GS50-10B-11	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ANIMAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
12	LEGEND DRUG INVENTORY Physical inventory of approved legend drugs performed and reconciled with the Legend Drug Log Book not less than every six months. New series – 04/03	OFM	2 years after inventory/reconciliation completed	Destroy when obsolete or superseded	GS50-10B-22	Reference WAC 246-886-080.
13	LEGEND DRUG LOG BOOK AND SUPPORTING DOCUMENTS A log book used to record the receipt, use, and disposition, and invoices, record books, disposition records, and other records regarding approved legend drugs. New Series – 04/03	OPR	Last entry in log plus 6 years	Destroy when obsolete or superseded	GS50-10B-19	Reference WAC 246-886-080.
14	LICENSE APPLICATIONS – ANIMAL CONTROL	OFM	3 years	Destroy when obsolete or superseded	GS50-10B-12	
15	OFFICER DAILY REPORT – ANIMAL CONTROL	OFM	2 years	Destroy when obsolete or superseded	GS50-10B-03	
16	PATROL AND PICKUP REQUESTS OR CALL BOOKS – ANIMAL CONTROL	OFM	2 years	Destroy when obsolete or superseded	GS50-10B-13	
17	PET LICENSES – ANIMAL CONTROL	OPR	Expiration plus 6 years	Destroy when obsolete or superseded	GS50-10B-14	
18	PET OWNER INDEX – ANIMAL CONTROL	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	GS50-10B-15	
19	PLACEMENT NOTICE – ANIMAL CONTROL	OFM	2 years	Destroy when obsolete or superseded	GS50-10B-05	
20	PREVENTATIVE HEALTH RECORD Form used to document preventative measures (i.e. wormer medication, vaccinations, spay/neuter) applied to animals in shelter prior to adoption. Also used to document controlled substances given to animal while at a clinic for liability release for health issues. Includes vaccinations given, date of treatment, controlled substances used, amount, etc. New series – 07/03	OPR	Completion of procedure plus 6 years	Destroy when obsolete or superseded	GS50-10B-23	
21	RELEASE CERTIFICATE – ANIMAL CONTROL	OFM	2 years	Destroy when obsolete or superseded	GS50-10B-06	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ANIMAL SERVICES

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
22	STATISTICAL REPORTS – ANIMAL CONTROL	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-10B-16	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
23	VETERINARIAN SERVICE BILLS – ANIMAL CONTROL	OPR	6 years	Destroy when obsolete or superseded	GS50-10B-17	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ASSIGNED COUNSEL

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ASSIGNED COUNSEL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	DEFENDANT INTERVIEW CARDS & SHEETS Information provided by defendant, re: Financial details pertinent to determination of indigence. Personal details concerning employment, residence, references pertinent to bail/personal recognizance.	OFM	3 years	Destroy when obsolete or superseded	GS50-30-01	
2	INDIGENT CLIENT DEFENSE FILES ADULTS Attorney's legal documents, financial screening, police reports, and case work-up. A. CLASS "A" FELONIES / MAJOR CASES-CONVICTIONS Adult murder, manslaughter, vehicular homicide, kidnapping, assault 1, and sex offender cases. B. CLASS "B" FELONIES C. CLASS "C" FELONIES AND DUI D. CASES DISMISSED AND ACQUITTALS	OFM OFM OFM OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency) Official court of record – PERMANENT. (Police reports held by law enforcement agency) Official court of record – PERMANENT. (Police reports held by law enforcement agency) Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Public Defender – 20 years after sentencing Public Defender – 10 years after case dismissed or acquittal Public Defender – 5 years after sentencing Public Defender – 3 years after sentencing	GS50-30-02A GS50-30-02B GS50-30-02C GS50-30-02D	
3	INDIGENT CLIENT DEFENSE FILES JUVENILE Attorney's legal documents, financial screening, police reports, and case work-up. A. CLASS "A" FELONIES / MAJOR CASES-CONVICTIONS Murder, manslaughter, vehicular homicide, kidnapping, assault 1, and sex offender cases.	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Public Defender – 20 years after sentencing	GS50-30-03A	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ASSIGNED COUNSEL

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
	B. CLASS "B" FELONIES	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Public Defender – 10 years after case dismissed or acquittal	GS50-30-03B	
	C. CLASS "C" FELONIES AND DUI	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Public Defender – 5 years after sentencing	GS50-30-03C	
	D. CASES DISMISSED AND ACQUITTALS	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Public Defender – 3 years after sentencing	GS50-30-03D	
4	PROMISSORY NOTES – PUBLIC DEFENDER Agreements by defendants to reimburse county for cost of appointed counsel.	OPR	Payment in full or breach plus 6 years	Destroy when obsolete or superseded	GS50-30-04	
5	PROMISSORY NOTES CASH TRANSMITTALS AND RECORDS – PUBLIC DEFENDER	OPR	6 years	Destroy when obsolete or superseded	GS50-30-05	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: CEMETERY RECORDS

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

CEMETERY RECORDS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	BURIAL PERMITS	OFM	Health District or Department retains primary copy	Destroy when obsolete or superseded	GS50-35-01	
2	INDEX OF INTERMENTS – CEMETERY RECORDS ESSENTIAL RECORD – Needs security microfilm backup – See remarks.	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-35-02	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives Branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
3	RECORDS OF BURIAL OR INTERMENT – CEMETERY RECORDS	OPR	6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-35-03	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives Branch.
4	SECTION BOOKS – CEMETERY RECORDS ESSENTIAL RECORD – Needs security microfilm backup – See remarks.	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-35-04	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives Branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

CEMETERY RECORDS

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
5	<p>SECTION MAPS – CEMETERY RECORDS Maps indicating sold and available grave lots and occupied grave lots.</p> <p>ESSENTIAL RECORD – Needs security microfilm backup – See remarks.</p>	OFM	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-35-05	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives Branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

GENERAL RECORDS RETENTION SCHEDULE FOR ALL LOCAL GOVERNMENT AGENCIES

RECORDS CATEGORY: COMMUNICATIONS

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE - UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

COMMUNICATIONS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	911 CONVERSATIONS MASTER RECORDINGS	OFM	90 days	Destroy when obsolete or superseded	GS50-29-01	
2	911 ELECTRONIC PRINTOUTS	OPR	6 years	Destroy when obsolete or superseded	GS50-29-02	
3	COMPUTER AUTOMATED DISPATCH BACKUP TAPES ESSENTIAL RECORD – Backup MUST BE stored off-site – See remarks. Series revised – Changed designation from “OPR,” and reduced primary copy retention from 6 years - 05/03	OFM	3 years	Destroy when obsolete or superseded	GS50-29-03	In order to protect the physical security and accessibility of tape-recorded information for the duration of its retention period requirement, backup tapes must be stored off-site in a temperature and humidity-controlled environment.
4	MASTER ADDRESS STREET LOGS - COMMUNICATIONS	OFM	1 year	Destroy when obsolete or superseded	GS50-29-05	
5	NATIONAL CRIMINAL INFORMATION CENTER LOGS – COMMUNICATIONS	OFM	1 year	Destroy when obsolete or superseded	GS50-29-06	
6	RADIO LOGS – COMMUNICATIONS Series revised – Reduced primary copy retention from 6 years - 05/03	OFM	60 days	Destroy when obsolete or superseded	GS50-29-07	
7	SUPERVISOR SHIFT REPORTS – COMMUNICATIONS	OFM	2 years	Destroy when obsolete or superseded	GS50-29-08	
8	TAPE REQUESTS – COMMUNICATIONS	OFM	6 years	Destroy when obsolete or superseded	GS50-29-09	
9	TELETYPES (INCOMING AND OUTGOING) –COMMUNICATIONS Series revised – Reduced primary copy retention from 3 years - 05/03	OFM	1 year	Destroy when obsolete or superseded	GS50-29-10	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: COMMUTE TRIP REDUCTION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

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These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

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General records retention schedule listings for some records series include special designations and disposition instructions, including:


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Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

COMMUTE TRIP REDUCTION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	COMMUTE TRIP REDUCTION ADMINISTRATION (CTRA) ANNUAL PROGRESS REPORT Describes progress in attaining the applicable commute trip reduction goals for each commute trip reduction zone, any problems being encountered in achieving those goals. Submitted to the CTR task force annually through July 1, 2006.	OFM	State Department of Transportation CTR Task Force holds primary copy	Destroy when obsolete or superseded – Potential archival value – See remarks	GS59-01-01	Please reference RCW 70.94.527 (7), (8). Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	COMMUTE TRIP REDUCTION PARTICIPANT FILES Includes bonus voucher certification forms, registration forms, incentives and parking tracking files for compliance with Commute Trip Reduction Administration.	OFM	3 years	Destroy when obsolete or superseded	GS59-01-02	
3	COMMUTE TRIP REDUCTION PROGRAM ADMINISTRATIVE FILES Program administration documentation.	OFM	2 years	Destroy when obsolete or superseded	GS59-01-03	
4	YEARLY SURVEY/QUESTIONNAIRE OF EMPLOYEES – COMMUTE TRIP REDUCTION	OFM	3 years	Destroy when obsolete or superseded	GS59-01-04	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: CONSERVATION DISTRICTS

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

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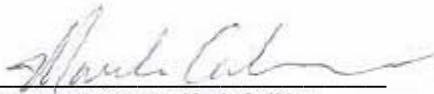
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Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

CONSERVATION DISTRICTS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	<p>AGREEMENTS WITH LANDOWNERS IN WHICH THE CONSERVATION DISTRICT IS A SIGNING PARTY All agreements with individual landowners in which the Conservation District is a signing party. Includes Cooperative Plans, Farm Management Plans, Resource Management System Plans, Inventory and Evaluation Plans, Water Quality Cost Sharing and Implementation Agreements, and U.S. Fish and Wildlife Service Best Management Practice Cost Share Incentive Program Agreements.</p> <p>ESSENTIAL RECORD - Needs security backup - See remarks.</p>	OPR	Expiration of agreement plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-11	Please contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site security storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
2	<p>AGREEMENTS WITH LANDOWNERS IN WHICH THE CONSERVATION DISTRICT IS NOT A SIGNING PARTY – OFFICE REFERENCE COPIES Copies of agreements with individual landowners and various branches of the U.S. Department of the Interior and the Washington State Department of Ecology in which the Conservation District is not a signing party.</p>	OFM	Washington State Department of Ecology and/or U.S. Department of the Interior keep primary copy.	Conservation Districts: Destroy when obsolete or superseded - Potential archival value - See remarks	GS50-01-11	Please contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3	<p>ANNUAL PLANS – CONSERVATION DISTRICTS</p>	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS59-02-01	Please contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

CONSERVATION DISTRICTS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
4	LONG RANGE PLANS – CONSERVATION DISTRICTS ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Expiration plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS59-02-02	Please contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site security storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: CORONERS AND MEDICAL EXAMINERS

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Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

CORONERS AND MEDICAL EXAMINERS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	CARD FILE INDEX Index used as cross-reference tool to case files. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-34-01	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
2	CORONER/MEDICAL EXAMINER LEDGER Complete coroner/medical examiner record listed by date both chronological and alphabetical. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-34-02	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
3	CORONER/MEDICAL EXAMINER INVESTIGATION FILES Reports, transmittals and other documentation of laboratory and investigative work. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-34-03	If suspicion of foul play and case is unsolved after 7 years, file may be microfilmed in lieu of retaining original record. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
4	DEATH REPORTS AND INDIGENT BURIAL DOCUMENTATION Review, screening and disposal documentation compiled for deaths that do not warrant a full investigation.	OPR	6 years	Destroy when obsolete or superseded	GS50-34-04	
5	INQUESTS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-34-05	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
6	MORGUE REGISTERS Registers or log sheets recording the arrival and removal of bodies from the morgue.	OFM	6 years	Destroy when obsolete or superseded	GS50-34-06	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

CORONERS AND MEDICAL EXAMINERS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	PERSONAL PROPERTY DOCUMENTATION FOR DECEASED PERSONS	OFM	3 years	Destroy when obsolete or superseded	GS50-34-07	
8	PHOTOGRAPHIC AND VIDEO DOCUMENTATION OF DEATH INVESTIGATIONS	OFM	Close of investigation plus 3 years	Destroy when obsolete or superseded	GS50-34-08	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: DISPUTE RESOLUTION/MEDIATION

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

DISPUTE RESOLUTION/MEDIATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	<p>FINAL AGREEMENT A written agreement the parties enter into at the conclusion of the resolution process which sets fourth the settlement of the issues and the future responsibilities of each party, if any.</p> <p>New series – 08/02</p>	OPR	Termination or withdrawal plus 6 years	Destroy when obsolete or superseded	GS50-01-11	Reference RCW 7.75.
2	<p>INITIAL AGREEMENT A written agreement that expresses the method by which the disputing parties shall attempt to resolve the issues in dispute.</p> <p>New series – 08/02</p>	OPR	Termination or withdrawal plus 6 years	Destroy when obsolete or superseded	GS50-01-11	Reference RCW 7.75.
3	<p>WORKING FILES May include mediator notes, memoranda, work papers, correspondence, etc.</p> <p>New series – 08/02</p>	OFM	Destroy after agreement is reached or withdrawal is executed	Destroy when obsolete or superseded	GS50-01-02	Reference RCW 7.75.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ELECTION RECORDS

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTION RECORDS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	AFFIDAVITS OF PUBLICATION OF NOTICES OF ELECTIONS	OPR	6 years	Destroy when obsolete or superseded	AU52-03C-06	
2	CHALLENGES TO VOTER	OFM	Election plus 60 days	Destroy when obsolete or superseded	AU52-03C-11	Reference *42 USC 74.
3	NOTICES OF ELECTIONS	OPR	6 years	Destroy when obsolete or superseded	AU52-03C-29	
4	POLL BOOK / TALLY BOOK (OFFICIAL) - ELECTIONS	OPR	22 months	Destroy when obsolete or superseded	AU52-03C-36	Reference *42 USC 74.
5	TALLY SHEETS AND CANVASS SHEETS - ELECTIONS	OFM	Election plus 60 days	Destroy when obsolete or superseded	AU52-03C-57	Reference *42 USC 1974, RCW 29.64, RCW 29.65.
6	VOTED BALLOTS -ELECTIONS Including absentee, special, and vote by mail.	OPR	Election plus 60 Days	Destroy when obsolete or superseded	AU52-03C-61	Reference *42 USC 1974, RCW 29.54.075, WAC 434-62-200, RCW 29.64, RCW 29.65
7	WORKING FILES -ELECTIONS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	AU52-03C-23	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ELECTRIC UTILITIES

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	APPARATUS FAILURE REPORTS – ELECTRIC POWER DISTRIBUTION SYSTEM	OPR	6 years - See remarks	Destroy when obsolete or superseded	GS55-05E-01	Reference 18CFR125.3 23.1(f), National Association of Regulatory Utility Commissioners NARUC 23.1(f).
2	BOILER TUBE FAILURE REPORT – ELECTRIC POWER GENERATION SYSTEM	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05D-01	Reference 18CFR125.3 22.1(c), National Association of Regulatory Utility Commissioners NARUC 22.1(c).
3	COAL LOGS – ELECTRIC POWER GENERATION SYSTEM	OFM	3 years- See remarks	Destroy when obsolete or superseded	GS55-05D-02	Reference 18CFR125.3 22.1(h), National Association of Regulatory Utility Commissioners NARUC 22.1(h).
4	CONSTRUCTION COST ANALYSIS STUDIES – ELECTRIC POWER SYSTEM ENGINEERING AND CONSTRUCTION	OFM	10 years after clearance to plant account - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05G-01	Reference 18CFR125.3 31(f), National Association of Regulatory Utility Commissioners NARUC 31(f). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	CONSTRUCTION PROJECT FILES – ELECTRIC POWER SYSTEM ENGINEERING AND CONSTRUCTION	OPR	Completion of project plus 10 years - See remarks	Destroy when obsolete or superseded	GS55-05G-02	Reference 18CFR125.3 31(e), 18CFR125.3(g), National Association of Regulatory Utility Commissioners NARUC 31(e), NARUC 31(g).
6	DIVERSION ELECTRICITY INVESTIGATION RECORDS Inquiry regarding problems or discrepancies with meters, either from meter reader or other parties. Investigation records may include: site visit dates, notes regarding location, pictures of meter or surrounding area, consumption history, special meter read, and service order for technical support. New series – 10/04	OPR	Investigation closed plus 6 years	Destroy when obsolete or superseded	GS55-05G-07	
7	ELECTRIC POWER REPORTS REQUIRED BY REGULATORY AGENCIES AND COMMISSIONS New series – 07/03	OPR	5 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS55-05D-21	Reference 18CFR125.3(41). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
8	ELECTRICAL WORK PERMITS (HARD CARDS) – ELECTRIC POWER DISTRIBUTION SYSTEM Permits for individuals to install residential alarms, communications, etc.	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS55-05E-25	
9	EQUIPMENT LOGS – ELECTRIC POWER GENERATION SYSTEM Records of use and performance, including in and out times.	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05D-03	Reference National Association of Regulatory Utility Commissioners NARUC 22.1(b).
10	EXPENDITURE REQUISITION AND AUTHORIZATION FILES – ELECTRIC POWER SYSTEM ENGINEERING AND CONSTRUCTION	OPR	10 years - See remarks	Destroy when obsolete or superseded	GS55-05G-03	Reference 18CFR125.3 31(c), National Association of Regulatory Utility Commissioners NARUC 31(c).
11	FACILITY INSPECTION AND MAINTENANCE REPORTS – ELECTRIC POWER DISTRIBUTION SYSTEM Periodic reports on the condition of substations, underground vaults, and other distribution system facilities.	OPR	6 years - See remarks	Destroy when obsolete or superseded	GS55-05E-14	Reference 18CFR125.3 23.1(k), National Association of Regulatory Utility Commissioners NARUC 23.1(k).
12	FACILITY RETIREMENT AUTHORIZATION – ELECTRIC POWER DISTRIBUTION SYSTEM	OPR	10 years after facility retired - See remarks	Destroy when obsolete or superseded	GS55-05E-02	Reference 18CFR125.3 32(b), National Association of Regulatory Utility Commissioners NARUC 32(b). If equipment or facility has PCB content, retain record permanently to protect the agency's open-ended liability for the handling and disposal of hazardous substances.
13	FACILITY RETIREMENT WORK ORDER – ELECTRIC POWER DISTRIBUTION SYSTEM Basic record of facility removal and/or replacement.	OPR	10 years after facility retired - See remarks	Destroy when obsolete or superseded	GS55-05E-03	Reference 18CFR125.3 32(a), National Association of Regulatory Utility Commissioners NARUC 32(a). If equipment or facility has PCB content, retain record permanently to protect the agency's open-ended liability for the handling and disposal of hazardous substances.
14	FISH COUNT REPORTS – ELECTRIC POWER GENERATION SYSTEM Periodic reports on fish population, including charts, summaries, and accounts of population increase and decrease.	OFM	10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05D-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
15	FORECASTS – ELECTRIC UTILITIES Includes forecasts of estimated power loads, future income, receipts and expenditures in connection with financing, construction and operations, including acquisitions and disposals of properties or investments prepared for internal administrative or operating purposes. New series – 07/03	OFM	3 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS55-05D-20	Reference 18CFR125.3(39). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
16	GAUGE READING REPORTS (OTHER THAN WATER OR RIVER FLOW) – ELECTRIC POWER GENERATION SYSTEM	OFM	2 years- See remarks	Destroy when obsolete or superseded	GS55-05D-05	Reference 18CFR125.3 22(i), National Association of Regulatory Utility Commissioners NARUC 22(i).
17	GENERATION AND OUTPUT LOGS WITH SUPPORTING DATA – ELECTRIC POWER GENERATION SYSTEM	OPR	6 years - See remarks	Destroy when obsolete or superseded	GS55-05D-06	Reference 18CFR.3 22.1(d), National Association of Regulatory Utility Commissioners NARUC 22.1(d).
18	HIGH-TENSION AND LOW-TENSION GENERATING LOAD RECORDS – ELECTRIC POWER GENERATION SYSTEM	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05D-07	Reference 18CFR125.3 22.1(f), National Association of Regulatory Utility Commissioners NARUC 22.1(f).
19	HYDRO-ELECTRIC OPERATIONS LOGS AND REPORTS – ELECTRIC POWER GENERATION SYSTEM Includes daily and hourly logs, shift records, supervisors and plant operations daily diaries. May be needed for documentation of issues in litigation.	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05D-08	Reference National Association of Regulatory Utility Commissioners NARUC 22.1(a).
20	INSULATOR TEST RECORDS – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	Destroy when obsolete or superseded - See remarks	Destroy when obsolete or superseded	GS55-05E-04	Reference 18CFR125.3 23.1(i), National Association of Regulatory Utility Commissioners NARUC 23.1(i).
21	LIGHTNING AND STORM DATA – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	Destroy when obsolete or superseded – Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05E-05	Reference 18CFR125.3(h), National Association of Regulatory Utility Commissioners NARUC 23.1(h). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
22	LINE INSPECTION REPORTS – ELECTRIC POWER DISTRIBUTION SYSTEM	OPR	6 years - See remarks	Destroy when obsolete or superseded	GS55-05E-06	Reference 18CFR125.3 23.1(g), National Association of Regulatory Utility Commissioners NARUC 23.1(g).
23	LINE TROUBLE REPORTS AND RECORDS – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05E-07	Reference 18CFR125.3 21.1(g), National Association of Regulatory Utility Commissioners NARUC 23.1(g).
24	LOAD CURVES – ELECTRIC POWER GENERATION SYSTEM	OFM	3 years- See remarks	Destroy when obsolete or superseded	GS55-05D-09	Reference 18CFR125.3 22.1(h), National Association of Regulatory Utility Commissioners NARUC 22.1(h).
25	LOAD DISPATCHER PERMITS – ELECTRIC POWER GENERATION SYSTEM	OFM	Destroy when obsolete or superseded - See remarks	Destroy when obsolete or superseded	GS55-05D-10	Reference National Association of Regulatory Utility Commissioners NARUC 22.1(k).
26	MAINTENANCE REPORTS – ELECTRIC POWER GENERATION SYSTEM For hydroelectric equipment and facilities performance and repairs.	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05D-11	Reference National Association of Regulatory Utility Commissioners NARUC 22.1(b).
27	MAPS AND AREA PLATS – ELECTRIC POWER DISTRIBUTION SYSTEM Shows distribution lines, facilities, and service area. ESSENTIAL RECORD – Needs security microfilm backup - See remarks.	OFM	Until superseded OR 6 years after system retired. Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05E-15	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
28	METER HISTORY DATA – ELECTRIC POWER DISTRIBUTION SYSTEM Historical data on each meter, including specification, serial number, location, and maintenance history.	OFM	Life of equipment - See remarks	Destroy when obsolete or superseded	GS55-05E-08	Reference 18CFR125.3 23.1(m), National Association of Regulatory Utility Commissioners NARUC 23.1(m).
29	METER SHOP REPORTS – ELECTRIC POWER DISTRIBUTION SYSTEM Monthly/periodic reports summarizing test, repairs, and other work done on meters.	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05E-09	Reference 18CFR125.3 23.1(l), National Association of Regulatory Utility Commissioners NARUC 23.1(l).

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
30	<p>OPERATIONS LOGS AND REPORTS – ELECTRIC POWER DISTRIBUTION SYSTEM Including, but not limited to, equipment, operator, storage battery, substation, and transmission.</p> <p>Series revised: Added “AND REPORTS” to title – 07/03</p>	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05E-10	Reference 18CFR125.3 23.1(a), 18CFR125.3 23.1(b), 18CFR125.3 23.1(c), National Association of Regulatory Utility Commissioners NARUC 23.1(a), NARUC 23.1(b), NARUC 23.1(c).
31	OUTAGE LOG – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05E-11	Reference 18CFR125.3 23.1(d), National Association of Regulatory Utility Commissioners NARUC 23.1(d).
32	<p>POLE LIST – ELECTRIC POWER DISTRIBUTION SYSTEM Record of utility pole type, description, location, ancillary equipment, etc.</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OFM	Life of equipment - See remarks	Destroy when obsolete or superseded	GS55-05E-12	Reference 18CFR125.3 23.1(p), National Association of Regulatory Utility Commissioners NARUC 23.1(p). The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
33	<p>POLLUTION REPORTS/STUDIES – ELECTRIC POWER GENERATION SYSTEM Related to waste accumulation and water, chemical, oil, noise, and radioactive pollution.</p>	OFM	10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05D-12	Reference CRF125.3 22(g), National Association of Regulatory Utility Commissioners NARUC 22.1(g). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
34	POWER DEMAND CHARTS – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05E-13	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
35	RECORDING INSTRUMENT CHARTS – ELECTRIC POWER GENERATION SYSTEM	OFM	1 year - See remarks	Destroy when obsolete or superseded	GS55-05D-13	Reference 18CFR125.3 22.1(l), National Association of Regulatory Utility Commissioners NARUC 22.1(l).
36	STAKING SHEETS – ELECTRIC POWER DISTRIBUTION SYSTEM Form describing power line construction or extension. ESSENTIAL RECORD – Needs security microfilm backup - See remarks	OFM	Life of equipment - See remarks	Destroy when obsolete or superseded	GS55-05E-16	Reference 18CFR125.3 23.1(p), National Association of Regulatory Utility Commissioners NARUC 23.1(p). The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
37	STANDARDS AND SPECIFICATIONS MANUAL – ELECTRIC POWER SYSTEM ENGINEERING AND CONSTRUCTION ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	10 years after superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05G-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list, that identifies the locations of other copies inside or outside the agency.
38	STATION AND SYSTEM GENERATION REPORTS – ELECTRIC POWER GENERATION SYSTEM Periodic reports on the amount of power being generated.	OPR	25 years - See remarks	Destroy when obsolete or superseded	GS55-05D-14	Reference 18CFR125.3 22.1(e), National Association of Regulatory Utility Commissioners NARUC 22.1(e).
39	STATION LOAD PERMITS – ELECTRIC POWER GENERATION SYSTEM	OPR	Destroy when obsolete or superseded - See remarks	Destroy when obsolete or superseded	GS55-05D-15	Reference National Association of Regulatory Utility Commissioners NARUC 22.1(k).
40	STREET LIGHT HISTORY RECORDS – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-05E-17	
41	STREET OPENING INSPECTION AND REPAIR REPORTS – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	Destroy when obsolete or superseded - See remarks	Destroy when obsolete or superseded	GS55-05E-18	Reference 18CFR125.3 23.1(j), National Association of Regulatory Utility Commissioners NARUC 23.1(j).

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
42	SURPLUSED TRANSFORMER FILES – ELECTRIC POWER DISTRIBUTION SYSTEM Documentation of transformers taken out of service and sold to other parties or disposed of as scrap.	OFM	Sale or disposal plus 10 years - See remarks	Destroy when obsolete or superseded	GS55-05E-19	Reference 18CFR125.3 23.1(p), National Association of Regulatory Utility Commissioners NARUC 23.1(p). If equipment or facility has PCB content, retain record permanently to protect the agency's open-ended liability for the handling and disposal of hazardous substances.
43	TECHNICAL DATA FILES – ELECTRIC POWER GENERATION SYSTEM Periodic reports, charts, and miscellaneous data on weather, geology, hydrology, and topography created for reference use.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05D-16	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
44	TEMPERATURE LOGS – ELECTRIC POWER GENERATION SYSTEM	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05D-17	Reference 18CFR125.3 22.1(h), National Association of Regulatory Utility Commissioners NARUC 22.1(h). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
45	TRANSFORMER HISTORY DATA -- ELECTRIC POWER DISTRIBUTION SYSTEM Includes specifications, location, and maintenance history. ESSENTIAL RECORD - Needs security microfilm backup- See remarks.	OFM	Life of equipment - See remarks	Destroy when obsolete or superseded	GS55-05E-20	Reference 18CFR125.3 23.1(n), National Association of Regulatory Utility Commissioners NARUC 23.1(n). The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet State Archives standards.
46	TRANSFORMER INSPECTION REPORTS – ELECTRIC POWER DISTRIBUTION SYSTEM	OFM	3 years - See remarks	Destroy when obsolete or superseded	GS55-05E-21	Reference 18CFR125.3 23.1(o), National Association of Regulatory Utility Commissioners NARUC 23.1(o). If equipment of facility has PCB content, retain record permanently to protect the agency's open-ended liability for the handling and disposal of hazardous substances.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRIC UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
47	TURBINE HISTORY FILES – ELECTRIC POWER DISTRIBUTION SYSTEM Documentation of installation, operation, and maintenance logs, etc.	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-05E-26	
48	UNDERGROUND LINE FILES – ELECTRIC POWER DISTRIBUTION SYSTEM Data on underground lines, including location and specification. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OFM	Life of equipment - See remarks	Destroy when obsolete or superseded	GS55-05E-23	Reference 18CFR125.3 23.1(p), National Association of Regulatory Utility Commissioners NARUC 23.1(p). The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
49	UTILITY PLANT CONSTRUCTION CONTRACTS Official documentation of contracts and agreements for purchase of goods or services relating to the construction of utility plant. May include consultant contracts, public work contracts, or non-stock material contract. New series – 07/03	OPR	Sale or retirement of plant plus 6 years	Destroy when obsolete or superseded	GS55-05G-06	Reference 18CFR125.3(22b).
50	VOLTAGE CHARTS – ELECTRIC POWER DISTRIBUTION SYSTEM Documentation of voltage delivered to the power distribution system.	OFM	3 years	Destroy when obsolete or superseded	GS55-05E-24	
51	WATER LOGS – ELECTRIC POWER GENERATION SYSTEM	OFM	3 years- See remarks	Destroy when obsolete or superseded	GS55-05D-18	Reference 18CFR125.3 22.1(h), National Association of Regulatory Utility Commissioners NARUC 22(h).

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ELECTRIC UTILITIES

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
52	WATER/RIVER FLOW REPORTS – ELECTRIC POWER GENERATION SYSTEM ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05D-19	Reference 18CFR125.3 22(i), National Association of Regulatory Utility Commissioners NARUC 22(i). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
53	WORK IN PROGRESS LEDGERS OR REPORTS – ELECTRIC POWER SYSTEM ENGINEERING AND CONSTRUCTION	OPR	10 years after clearance to plant account - See remarks	Destroy when obsolete or superseded	GS55-05G-05	Reference 18CFR125.3 31(a), National Association of Regulatory Utility Commissioners NARUC 31(a).
54	WORK ORDERS – ELECTRIC POWER SYSTEM ENGINEERING AND CONSTRUCTION	OPR	10 years after clearance to plant account - See remarks	Destroy when obsolete or superseded	GS50-06B-13	Reference 18CFR125.3 31(b), National Association of Regulatory Utility Commissioners NARUC 31(b).

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ELECTRONIC INFORMATION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRONIC INFORMATION - GENERAL

DATA AND INPUT DOCUMENTATION

<p>DATABASE AND SPREADSHEET DATA FINDING AIDS AND INDEXES (USER WORKING COPY) INPUT DOCUMENTS WORD PROCESSING FILES</p>	<p>Primary record copies of completed drafts and documents should be filed with the appropriate records series and retained in hard copy or electronic form according to the minimum retention periods approved by the Local Records Committee for those records series. User and other secondary copies should be destroyed when obsolete or superseded. The appropriate Disposition Authority Number (DAN) should be referenced when documenting the disposal of public record information regardless of the medium or format in which it is stored.</p>
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ELECTRONIC MAIL

Electronic mail (E-mail) is primarily a communication system. Individual E-mail messages may be public records with legally mandated retention requirements, or may be information with no retention value. E-mail messages are public records when they are created or received in the transaction of public business and retained as evidence of official policies, actions, decisions, or transactions. Such messages must be identified, filed, and retained just like records in other format.

Currently few E-mail systems are designed to categorize and retain information. E-mail messages with public record content should be retained in E-mail format only as long as they are being worked on or distributed. Upon completion, E-mail messages containing public record information should be printed out or transferred to an electronic document management system, filed with the appropriate records series, and retained for the minimum retention period assigned by the Local Government General Records Retention Schedule or a records retention schedule approved specifically for the agency by the Local Records Committee.

SUPERSEDED

<p>E-MAIL MESSAGES WHICH ARE USUALLY PUBLIC RECORDS AND MUST MEET RECORDS RETENTION REQUIREMENTS BEFORE BEING DESTROYED:</p> <ul style="list-style-type: none"> Policy and Procedure Directives Correspondence or memoranda related to official public business Agendas and minutes of meetings Documents relating to legal or audit issues Messages which document agency actions, decisions, operations and responsibilities Documents that initiate, authorize or complete a business transaction Drafts of documents that are circulated for comment or approval Final reports or recommendations Appointment calendars E-mail distribution lists Routine information requests Other messages sent or received that relate to the transaction of local government business 	<p>E-MAIL MESSAGES WHICH ARE USUALLY ADMINISTRATIVE MATERIALS WITH NO RETENTION VALUE:</p> <ul style="list-style-type: none"> Information-only copies, or extracts of documents distributed for reference or convenience, such as announcements or bulletins Phone message slips that do not contain information that may constitute a public record Copies of published materials Informational copies Preliminary drafts Routing slips Transmittals (Letters/memos) <p><i>See E-mail Guidelines on-line at Archives website: http://www.secstate.wa.gov/archives/doc/E-mail%20Guidelines.doc</i></p>
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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: ELECTRONIC INFORMATION – SYSTEM DOCUMENTATION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRONIC INFORMATION – SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	DATA PROCESSING FEASIBILITY STUDIES May include any or all of the following: problem identification; requirements statement; system objectives; alternative proposals; cost/benefit analysis; feasibility statement.	OFM	3 years	Destroy when obsolete or superseded	GS50-06A-01	
2	ELECTRONIC INFORMATION SYSTEM AND SOFTWARE BACKUP DATA Tapes, discs, and media providing backup data that is revised and recreated in a regular cycle. ESSENTIAL RECORD - Backup should be stored off site.	OFM	Destroy when obsolete or superseded – as determined by office of record	Destroy when obsolete or superseded	GS50-06A-02	In order to protect the physical security and accessibility of information for the duration of its retention requirement, backup tapes must be stored off-site in a temperature and humidity controlled environment.
3	ELECTRONIC INFORMATION SYSTEM DESIGN DOCUMENTATION May include any or all of the following: General description of design, including system review if applicable, system definition; project work plan; design detail, including documentation plan, program specifications, special forms and requirements; development plans for testing, training, conversion, and acceptance. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Fiscal/accounting systems - termination plus 3 years All other systems - Until all record data produced by the system pass their approved retention periods	Destroy when obsolete or superseded	GS50-06A-03	Source document microfilming is not recommended for this purpose. This records series should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
4	ELECTRONIC INFORMATION SYSTEM MAINTENANCE DOCUMENTATION May include any or all of the following: System or program change authorization; description of changes; acceptance testing.	OFM	Fiscal/accounting systems, termination plus 3 years All other systems - Until all record data produced by the system pass their approved retention periods	Destroy when obsolete or superseded	GS50-06A-04	Source document microfilming is not recommended for this purpose.
5	ELECTRONIC INFORMATION SYSTEM OPERATIONAL DATA Summaries of throughput statistics, usage figures, work output measurements, input edit listings, and system access logs.	OFM	1 year	Destroy when obsolete or superseded	GS50-06A-05	
6	ELECTRONIC INFORMATION SYSTEM POST IMPLEMENTATION REVIEWS Project and personnel evaluations, further recommendations.	OFM	Until termination of system or program use	Destroy when obsolete or superseded	GS50-06A-06	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

ELECTRONIC INFORMATION – SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	<p>ELECTRONIC INFORMATION SYSTEM PROGRAMMING AND IMPLEMENTATION DATA Operational and user instructions, specification, and system acceptance criteria.</p> <p>ESSENTIAL RECORD - Needs security backup - See remarks.</p>	OFM	Fiscal/accounting systems - termination plus 3 years All other systems - Until all record data produced by the system pass their approved retention periods	Destroy when obsolete or superseded	GS50-06A-07	Source document microfilming is not recommended for this purpose. This records series should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
8	<p>YEAR 2000 COMPLIANCE PROJECTS DOCUMENTATION May include program management plans, meeting documentation, project planning, assessment, conversion, test planning and results, implementation, contingency plans, and certification records.</p> <p>New Series – 10/99</p>	OPR	Termination of project and/or contract plus 6 years	Destroy when obsolete or superseded	GS50-06G-01	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: EMERGENCY SERVICES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

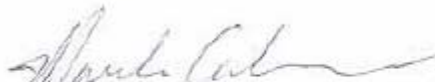
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Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.
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Archival and Potential Archival Value - The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.
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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE - UPDATED JANUARY 2005



For the Attorney General: Mark Galkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

EMERGENCY SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	CIVIL DEFENSE ZONE CONTROL HISTORY FILE	OPR	Destroy when obsolete or superseded plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-14-01	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	DISASTER DAMAGE DECLARATION STATEMENTS	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-14-02	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3	DISASTER PREPAREDNESS AND RECOVERY PLANS ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Destroy when obsolete or superseded plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-14-03	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
4	FALLOUT SHELTER MANAGEMENT FILE	OPR	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS50-14-04	
5	PROJECT FILES – EMERGENCY SERVICES	OPR	Completion of project plus 6 years	Destroy when obsolete or superseded	GS50-14-05	
6	RADIOLOGICAL FACILITIES INSPECTION REPORTS – EMERGENCY SERVICES	OPR	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS50-14-06	
7	SEARCH AND RESCUE MISSION FILES	OPR	6 years	Destroy when obsolete or superseded	GS50-14-07	
8	SEARCH AND RESCUE TRAINING MISSION FILES – EMERGENCY SERVICES	OFM	3 years	Destroy when obsolete or superseded	GS50-14-08	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: FACILITY AND PROPERTY MANAGEMENT

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FACILITY AND PROPERTY MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	APPRAISALS Statement of land and facility values, provided by independent appraisers under contract to the agency. <i>Series revised – 07/02</i>	OPR	Disposition of land or facility plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05A-01	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	BOILER VESSEL REPORTS A. Report of boiler inspection by custodian. B. Report of boiler or hot water tanks by insurance company or labor and industries.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-01	
3	CAPITAL IMPROVEMENT AND/OR LEVY PLANNING PROJECT FILE <i>New series – 09/02</i>	OFM	Completion of project – Potential archival value – See remarks	Destroy when obsolete or superseded	GS51-07-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
4	CONSTRUCTION LOG Chronological listing of the progress of construction projects. <i>New series – 09/02</i>	OFM	Completion and acceptance of project plus 6 years	Destroy when obsolete or superseded	GS51-07-07	
5	CONSTRUCTION PROJECT FILES Case file documentation on the progress and completion of each agency public works or engineering construction project. <i>Added from Public Works Section – 09/02</i>	OPR	Completion of project plus 6 years	Destroy when obsolete or superseded	GS50-18-10	
6	DEEDS/TITLES Legal documents of ownership.	OPR	County Auditor or recorder retains PERMANENT	Sale or disposal of land plus 10 years - See remarks	GS55-05A-02	Additional copies may be disposed of when obsolete or superseded.
7	DEMOGRAPHIC AND ENROLLMENT PROJECTIONS For school districts only. <i>New series –09/02</i>	OFM	5 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS51-07-08	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred and preserved at a Regional Archives Branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FACILITY AND PROPERTY MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
8	EASEMENTS Granted by and to agency.	OPR	County Auditor or recorder keeps PERMANENT	Reassignment or vacation of easement plus 10 years - See remarks	GS55-05A-03	Additional copies may be disposed of when obsolete or superseded.
9	ENCROACHMENTS Documentation of conflicts on land or water rights and obligations. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Closure of dispute plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05A-04	Reference RCW 4.16.020 for retention period. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
10	ENERGY USAGE MEASUREMENT REPORTS AND DATA <i>New series – 09/02</i>	OFM	5 years	Destroy when obsolete or superseded	GS51-07-09	
11	ENGINEERING AND ARCHITECTURAL DRAWINGS AND SPECIFICATIONS Architectural, structural, plumbing, electrical, etc. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Disposal or sale of property plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06B-02	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in the records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
12	ENVIRONMENTAL MONITORING REPORTS <i>Series revised – Change retention from PERMANENT – 11/03</i>	OFM	Disposition of land or facility plus 10 years - Potential archival value - See remarks	3 years	GS51-07-10	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
13	EVICTION RECORDS Eviction records, legal eviction files.	OPR	6 years after judgment or final decision	Destroy when obsolete or superseded	GS55-05A-09	

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**GENERAL RECORDS RETENTION SCHEDULE FOR
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FACILITY AND PROPERTY MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
14	FACILITY RENTAL/USE SCHEDULE	OFM	3 years	Destroy when obsolete or superseded	GS51-07-11	
15	FACILITY USE AUTHORIZATION PERMIT <i>New series – 09/02</i>	OPR	6 years	Destroy when obsolete or superseded	GS51-07-12	
16	FIRE EXTINGUISHER INSPECTION TAGS Prepared by fire departments or private firms.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-03	
17	FIXED ASSET INVENTORIES	OFM	Destroy when obsolete or superseded plus 3 years	Destroy when obsolete or superseded	GS50-06B-04	
18	INSTALLED EQUIPMENT/SYSTEM DOCUMENTATION – FACILITY AND PROPERTY MANAGEMENT Documentation of major equipment or operating systems, such as sound or audio-visual systems, not integral to the structure of a facility, which may be installed and replaced during the life of the facility. May include system layout descriptions, specifications, operating manuals, warranties, installation drawings and other documentation integral to the maintenance and operation of the equipment or system. <i>New series – 11/03</i>	OPR	6 years after the equipment or system is disposed of or replaced	Destroy when obsolete or superseded	GS50-06B-22	
19	INTRUSION ALARM REPORTS	OFM	1 year	Destroy when obsolete or superseded	GS50-06B-14	
20	KEY / CARD KEY INVENTORY Documentation of facility keys and/or card keys assigned to agency personnel. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-05	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FACILITY AND PROPERTY MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
21	LAND INFORMATION FILES General reference files on acquisition of land; condemnation proceedings, title info: i.e. location, size, value, etc. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OFM	Disposition of land plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05A-06	Selected records in this series are recorded by the County Auditor. Reference RCW 4.16.020 for retention period. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
22	LEASES Official documentation of leases for property leased by and from other parties and agency property leased to the public.	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS55-05A-07	
23	LONG RANGE FACILITIES PLAN New series – 09/02	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	GS51-07-15	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
24	MAINTENANCE HISTORY DOCUMENTATION Maintenance history for each building, which may include: Maintenance performed, work orders, purchase orders, copies of state and/or insurance companies inspection reports.	OFM	Life or sale of the facility	Destroy when obsolete or superseded	GS50-06B-06	
25	MAINTENANCE LOGS	OFM	Destroy when superseded plus 3 years	Destroy when obsolete or superseded	GS50-06B-07	
26	MAINTENANCE REPORTS	OFM	1 year	Destroy when obsolete or superseded	GS50-06B-08	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FACILITY AND PROPERTY MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
27	OPERATING MANUALS Prepared by contractors for use of the agency in maintaining equipment installed in buildings. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Disposition or sale of facility or equipment	Destroy when obsolete or superseded	GS50-06B-09	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
28	OPERATING PERMITS For boilers and elevators.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-10	
29	PARKING METER RECORDS Records documenting installation, replacement, removal, repair, preventative maintenance, etc. Includes meter location, name of person requesting service, date and time of installation, replacement, removal, repair, or maintenance. New series – 10/04	OPR	End of calendar year plus 6 years	Destroy when obsolete or superseded	GS55-05H-05	
30	POLLUTION AND POLLUTION CONTROL STUDIES	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05H-01	Environmental records for electrical utility facilities must be retained for at least 25 years as provided by 18CFR125.2. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
31	PROPERTY PURCHASE PROPOSALS (INACTIVE) Proposal for the purchase of agency's real property made by other parties and proposals made by district to acquire real property. New series – 09/02	OFM	3 years	Destroy when obsolete or superseded	GS51-07-21	
32	RESTITUTION STATEMENT Source document backup for billing. Series revised – Changed title from “STATEMENT FOR RESTITUTION” – 06/03	OPR	6 years	Destroy when obsolete or superseded	GS50-06B-17	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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FACILITY AND PROPERTY MANAGEMENT

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
33	SECURITY ANNUAL REPORT	OFM	1 year	Destroy when obsolete or superseded	GS50-06B-15	
34	SECURITY ID BADGE APPLICATION AND ISSUANCE DOCUMENTATION Documents security badges issued to employees and contractors working in the agency. New series – 05/03	OPR	Termination or revocation plus 6 years	Destroy when obsolete or superseded	GS50-06B-21	
35	SECURITY PATROL LOG Series revised – Reduced primary copy retention from 2 years. – 06/03	OFM	1 year	Destroy when obsolete or superseded	GS50-06B-16	
36	STAFF ACCESS/ENTRY LOGS	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-20	
37	STATE ENVIRONMENTAL POLICY ACT (SEPA) DETERMINATION OF SIGNIFICANCE OR NON-SIGNIFICANCE	OPR	Disposal or sale of property plus 10 years - See remarks	Destroy when obsolete or superseded	GS55-05H-02	Environmental records for electrical utility facilities must be retained for at least 25 years as provided by 18CFR125.2.
38	STATE ENVIRONMENTAL POLICY ACT (SEPA) ENVIRONMENTAL CHECKLISTS	OPR	Disposal or sale of property plus 10 years - See remarks	Destroy when obsolete or superseded	GS55-05H-03	Environmental records for electrical utility facilities must be retained for at least 25 years as provided by 18CFR125.2.
39	STATE ENVIRONMENTAL POLICY ACT (SEPA) ENVIRONMENTAL IMPACT STATEMENT WORK FILES New series – 04/04	OFM	Issuance of permit	Destroy when obsolete or superseded	GS51-07-26	
40	STATE ENVIRONMENTAL POLICY ACT (SEPA) ENVIRONMENTAL IMPACT STATEMENTS Submitted for land use code approval of agency projects.	OPR	Disposal or sale of property plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05H-04	Reference WAC 197-11. Environmental records for electrical utility facilities must be retained for at least 25 years as provided by 18CFR125.2. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FACILITY AND PROPERTY MANAGEMENT

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41	SURVEILLANCE VIDEOS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-18	Videos of incidents resulting in legal action should be retained with other documentation pertaining to that incident and are subject to those retention schedules.
42	VANDALISM REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-11	
43	VISITOR LOGS	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-12	
44	WEAPONS CONFISCATION LOG	OPR	6 years	Destroy when obsolete or superseded	GS50-06B-19	
45	WORK ORDERS Request for performance of maintenance work, may show location, date of request, work to be performed, etc. May include request for survey services. Series revised: Added last sentence to description – 11/04	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-13	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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RECORDS CATEGORY: FAIRS

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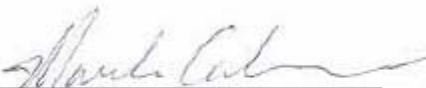
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FAIRS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	EXHIBITOR LISTS Concise lists of all exhibitors at a fair, showing name, category, dates, etc. Generated annually.	OFM	2 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS57-01-01	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	EXHIBITOR'S ENTRY FORM/SHOW SHEETS Information on each exhibitor and animal exhibited, showing name, type of entry, address, vet check verification, etc. Generated annually.	OFM	3 years	Destroy when obsolete or superseded	GS57-01-02	
3	RIBBON WINNERS LIST Concise lists of winners of events, shows name of winner, category, and placement. Generated annually. Data is sent to local newspapers for publication.	OFM	2 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS57-01-03	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
4	TICKET SUMMARY RECORD - FAIRS A record of season passes; gate receipts, commercial passes, complementary passes, and voided tickets. Generated annually.	OFM	3 years	Destroy when obsolete or superseded	GS57-01-04	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: FIRE AND EMERGENCY MEDICAL SERVICES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FIRE AND EMERGENCY MEDICAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ACCIDENT / INCIDENT REPORTS - VOLUNTEER FIREFIGHTER Used as documentation for evaluating firefighter disability claims.	OPR	For accidents/ incidents involving adults NOT resulting in claims- 3 years For accidents/ incidents involving adults resulting in claims- closure plus 6 years For accidents/ incidents involving minors NOT resulting in claims- age of majority plus 3 years For accidents/ incidents involving minors resulting in claims- closure plus 6 years	Destroy when obsolete or superseded	GS50-06C-02	The Local Records Committee suggests that policies, which allow claims retroactive to their period of coverage, should be retained permanently.
2	ALARM INSPECTION LOG - FIRE AND EMERGENCY MEDICAL SERVICES	OFM	3 years	Destroy when obsolete or superseded	GS53-04-01	
3	ALARM LOCATION RECORD - FIRE AND EMERGENCY MEDICAL SERVICES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS53-04-02	
4	ALARM SYSTEMS TEST AND MAINTENANCE RECORD - FIRE AND EMERGENCY MEDICAL SERVICES	OFM	3 years	Destroy when obsolete or superseded	GS53-04-03	
5	ANNUAL REPORT ADOPTED - FIRE FIGHTER BOARD OF TRUSTEES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-04	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
6	BUILDING INFORMATION HISTORY CARD - FIRE AND EMERGENCY MEDICAL SERVICES	OFM	Life of building - Potential archival value - See remarks	Destroy when obsolete or superseded	GS53-04-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FIRE AND EMERGENCY MEDICAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	BUILDING INSPECTION REPORTS – FIRE AND EMERGENCY MEDICAL SERVICES May include records pertaining to the decommissioning of underground fuel tanks.	OFM	6 years	Destroy when obsolete or superseded	GS53-04-05	
8	BURNING PERMITS A record of temporary permits authorizing the recipient to burn on a specific site for a specific period.	OPR	3 years	Destroy when obsolete or superseded	GS53-04-06	
9	BURNING REQUEST LOG Listings of burning permit applications.	OPR	3 years	Destroy when obsolete or superseded	GS53-04-07	
10	CAPITAL EQUIPMENT INVENTORY – FIRE AND EMERGENCY MEDICAL OPERATIONS	OFM	Destroy when superseded plus 3 years OR after completion of State Auditor's examination report	Destroy when obsolete or superseded	GS53-04-08	
11	DAILY RECORD OR LOG OF FIRE AND EMERGENCY MEDICAL SERVICES	OFM	3 years	Destroy when obsolete or superseded	GS53-04-09	
12	FIRE ALARM RESPONSE RECORD	OFM	3 years	Destroy when obsolete or superseded	GS53-04-10	
13	FIRE ALARM SYSTEMS DRAWINGS	OFM	Life of facility	Destroy when obsolete or superseded	GS53-04-11	
14	FIRE CODE VIOLATION NOTIFICATION Official notice of violation and statement of required corrective action.	OPR	6 years	Destroy when obsolete or superseded	GS53-04-21	
15	FIRE HYDRANT AND WATER MAIN INSPECTION LOG	OFM	3 years	Destroy when obsolete or superseded	GS53-04-12	
16	FIRE HYDRANT AND WATER MAIN INSPECTION REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS53-04-13	
17	FIRE INCIDENT REPORTS Includes basic information collected to document each fire incident.	OPR	6 years	Destroy when obsolete or superseded	GS53-04-14	
18	FIRE INVESTIGATION DOCUMENTATION -CLOSED INVESTIGATIONS Includes all investigations which are resolved as accidents or result in arson convictions. Series revised – Divided into three subsections and established separate retention periods for open investigations – 11/03	OPR	6 years	Destroy when obsolete or superseded	GS53-04-15	The primary record copy may be held by the city or county fire marshal, law enforcement agency or the State Fire Marshall's Office.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FIRE AND EMERGENCY MEDICAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
19	FIRE INVESTIGATION DOCUMENTATION -OPEN INVESTIGATIONS OF INCIDENTS THAT DO NOT RESULT IN LOSS OF HUMAN LIFE Includes investigations of arson and fires for which a cause has not been determined, that have not been resolved by a conviction. Series revised – Divided into three subsections and established separate retention periods for open investigations – 11/03	OPR	10 years - See remarks	Destroy when obsolete or superseded	GS53-04-16	Reference RCW 9A.04.080, which requires that criminal charges must be filed within 10 years after the occurrence of an arson that does not result in the loss of human life.
20	FIRE INVESTIGATION DOCUMENTATION -OPEN INVESTIGATIONS OF INCIDENTS THAT RESULT IN LOSS OF HUMAN LIFE Includes investigations of arson and fires for which a cause has not been determined, that have not been resolved by a conviction. Series revised – Divided into three subsections and established separate retention periods for open investigations – 11/03	OPR	Permanent - See remarks	Destroy when obsolete or superseded	GS53-04-17	Reference RCW 9A.04.080, which provides an unlimited amount of time to file criminal charges in cases of arson that result in the loss of human life.
21	FIRE ORDINANCES Local and state requirements, rules, guidelines, authority, etc.	OFM	Clerk of governing council, commission or board keeps PERMANENT	Destroy when obsolete or superseded	GS50-05A-16	
22	INDIVIDUAL FIRE ALARM BOX HISTORY	OFM	Life of box	Destroy when obsolete or superseded	GS53-04-17	
23	INJURY AND DISABILITY CLAIM FILES - VOLUNTEER FIREFIGHTER Documentation of claims for injury and disability relief filed by volunteer fire fighters.	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	GS58-04A-03	
24	INJURY AND DISABILITY CLAIM INVOICES - VOLUNTEER FIREFIGHTER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-30	
25	INSPECTOR'S TEST OF FIRE FIGHTING EQUIPMENT	OFM	Life of equipment	Destroy when obsolete or superseded	GS53-04-18	
26	INVENTORY OF PERSONAL EQUIPMENT ISSUED TO FIREFIGHTERS	OFM	Until superseded plus 3 years OR after completion of State Auditor's examination report	Destroy when obsolete or superseded	GS53-04-19	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FIRE AND EMERGENCY MEDICAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
27	MEDICAL INCIDENT REPORTS – FIRE AND EMERGENCY MEDICAL SERVICES	OPR	Retained by hospital/care provider* - See remarks	Fire protection agency - 8 years * - See remarks	GS53-04-20	Reference RCW 4.16.350. *The Washington State Supreme Court decision re: DeYoung v. Providence Medical Center has voided limitations of action and discovery previously provided by RCW 4.16.350. Contact your legal counsel and insurance provider for guidance on minimum retention policy for Client/Patient Health Care Information Records. The Washington State Medical Association is recommending 10 years after last visit, 20 years after last treatment of pregnant women and infants, or 5 years after a patient's death, whichever is longest.
28	MINUTES OF FIRE FIGHTER BOARD OF TRUSTEES PROCEEDINGS – APPROVED AND SIGNED Includes all referenced and attached documents. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-13	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
29	PERSONNEL ASSIGNMENT ROSTER -- FIRE AND EMERGENCY MEDICAL SERVICES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS53-04-22	
30	RADIO LOGS - FIRE & EMERGENCY MEDICAL SERVICES	OFM	90 days	Destroy when obsolete or superseded	GS53-04-23	
31	REMITTANCE FILES – VOLUNTEER FIRE FIGHTER	OPR	Retirement of last item plus 6 years - See remarks	Destroy when obsolete or superseded	GS50-03A-24	The County Auditor, Treasurer, or Finance Officer may hold the primary copy.
32	TAPE RECORDS OF FIRE ALARM CIRCUITS	OFM	3 years	Destroy when obsolete or superseded	GS53-04-24	
33	TRANSMITTAL OF FEES – VOLUNTEER FIREFIGHTER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-07	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

FIRE AND EMERGENCY MEDICAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
34	VEHICLE SERVICE RECORDS - FIRE & EMERGENCY MEDICAL SERVICES	OFM	Life of vehicle	Destroy when obsolete or superseded	GS53-04-25	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: GOVERNING COUNCILS, COMMISSIONS, AND BOARDS

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

GOVERNING COUNCILS, COMMISSIONS, AND BOARDS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	AFFIDAVIT OF MAILING, POSTING, AND PUBLICATION OF PUBLIC NOTICES	OPR	6 years	Destroy when obsolete or superseded	GS50-05A-20	
2	AGENCY CHARTERS Official, adopted charter defining scope of the agency and its rights, responsibilities, and authority. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-01	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
3	AGENDA REQUESTS	OFM	3 years	Destroy when obsolete or superseded	GS50-05A-02	
4	AGENDAS/BRIEFS/PACKETS Council, Commission, or Board Member Agendas/Briefs/Packets	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-03	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	ANNUAL REPORTS ADOPTED May also include annual messages of chief executive officer.	OPR	PERMANENT as adopted - 1 copy archival - See remarks	Destroy when obsolete or superseded	GS50-05A-04	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	APPOINTMENTS OF COUNCIL MEMBERS, COMMISSIONERS, BOARD MEMBERS, DEPARTMENT HEADS, OR OTHER AGENCY OFFICIALS	OPR	PERMANENT (in council, commission, or board minutes)	Destroy when obsolete or superseded	GS50-05A-05	
7	AUDIO/VIDEO RECORDINGS OF OFFICIAL PROCEEDINGS Magnetic sound or video recording of governing council, commission, or board proceedings which may be used to prepare minutes.	OPR	6 years OR 1 year if transcribed, and transcription is approved – See remarks	Destroy when obsolete or superseded	GS50-05A-06	Due to the limited life span of magnetic recordings, this records series cannot serve as a permanent record of the official proceedings. Verbatim accounts of meetings are often required as evidence in court proceedings involving decisions, which result in ordinances, resolutions, or official policy.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

GOVERNING COUNCILS, COMMISSIONS, AND BOARDS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
8	CHARTER HISTORY FILES Includes past, current, and proposed charters which will provide background and historical reference for county charter review.	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-07	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
9	FRANCHISES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Termination or withdrawal plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-10	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
10	GOALS & OBJECTIVES WORKING FILE	OFM	3 years	Destroy when obsolete or superseded	GS50-05A-11	
11	INDEXES TO MINUTES, ORDINANCES, AND RESOLUTIONS ESSENTIAL RECORD – Needs security microfilm backup - See remarks.	OFM	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-12	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
12	LONG-RANGE FACILITIES PLAN – ADOPTED New Series – 10/02	OPR	Clerk of the Government Council, Commission, or Board – PERMANENT – 1 copy potentially archival – See remarks	Destroy when obsolete or superseded	GS50-05A-22	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

GOVERNING COUNCILS, COMMISSIONS, AND BOARDS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
13	MINUTES OF OFFICIAL PROCEEDINGS APPROVED AND SIGNED Includes all referenced and attached documents. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-13	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
14	OATHS OF OFFICE ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-05A-15	This records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
15	ORDINANCES AND RESOLUTIONS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-16	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
16	PETITIONS TO THE COUNCIL, COMMISSION, OR BOARD	OPR	6 years	Destroy when obsolete or superseded	GS50-05A-17	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

GOVERNING COUNCILS, COMMISSIONS, AND BOARDS

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
17	RECORDS OF PUBLIC HEARINGS May include verbatim agenda, minutes, transcripts, speaker sign up, written testimony, and official notices. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value -See remarks	Destroy when obsolete or superseded	GS50-05A-18	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
18	SUB-COMMITTEE MINUTES/REPORTS	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-05A-08	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
20	TRANSCRIPTIONS OF AUDIO/VIDEO TAPES OF OFFICIAL PROCEEDINGS	OPR	6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-05A-21	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: HAZARDOUS MATERIALS ADMINISTRATION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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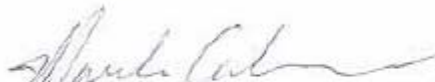
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Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.
Office Files and Memoranda (OFM) - are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value - The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.
Essential Record - This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE - UPDATED JANUARY 2005



For the Attorney General: Mark Galkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

HAZARDOUS MATERIALS ADMINISTRATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	GENERATOR ANNUAL DANGEROUS WASTE REPORT – HAZARDOUS MATERIALS ADMINISTRATION (To Department of Ecology) summary of hazardous waste removal. ESSENTIAL RECORD- Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-02	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
2	HAZARDOUS MATERIALS ABATEMENT PROJECT FILE Includes records of asbestos removal, underground storage tank removal, and other large-scale hazardous material removal. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-10	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
3	HAZARDOUS MATERIALS ACCIDENT/INCIDENT REPORT Description of accident and cleanup. Includes information on personal exposure. ESSENTIAL RECORD - Needs security microfilm backup -See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-03	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
4	HAZARDOUS MATERIALS CERTIFICATE OF DESTRUCTION ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-04	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

HAZARDOUS MATERIALS ADMINISTRATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
5	<p>HAZARDOUS MATERIALS DISPOSAL RECORDS AND/OR CERTIFICATE OF DESTRUCTION Documentation of hazardous materials disposed of by the agency. May include used oil, car parts, etc.</p> <p>ESSENTIAL RECORD – Needs security microfilm backup – See remarks.</p> <p>Series revised – Add “AND/OR CERTIFICATE OF DESTRUCTION” to title - 06/03</p>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-12	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
6	<p>HAZARDOUS MATERIALS EMERGENCY RESPONSE PLAN Annual reports prepared for the State Emergency Response Commission (SERC), Local Emergency Planning Committees (LERC), and local fire departments that document hazardous materials and their locations. The report makes emergency planners aware of hazardous materials located in their jurisdiction.</p> <p>New series – 09/04</p>	OPR	Completion of report plus 6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-19-16	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
7	<p>HAZARDOUS MATERIALS EMPLOYEE RIGHT TO KNOW IMPLEMENTATION PLAN</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-19-05	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
8	<p>HAZARDOUS MATERIALS INSPECTION AND TEST REPORTS</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-06	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

HAZARDOUS MATERIALS ADMINISTRATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
9	HAZARDOUS MATERIALS INVENTORY SHEET List of chemicals and other hazardous materials present in each work area. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-07	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
10	HAZARDOUS MATERIALS MANAGEMENT PLAN ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-08	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
11	HAZARDOUS MATERIALS TRAINED PERSONNEL LIST Includes certifications and lists of persons trained in handling hazardous materials, such as asbestos. Includes attendance information and completion date. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-09	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
12	HAZARDOUS MATERIALS TRAINING PROGRAMS Annual training and other training seminars for employees of the following: Hazardous materials, hazardous waste and hazardous exposure that may be required by the State. Records include but are not limited to; outline of classes, training agenda, and class summary. New series – 09/04	OFM	Date of training plus 5 years	Destroy when obsolete or superseded	GS50-19-17	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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HAZARDOUS MATERIALS ADMINISTRATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
13	MATERIALS SAFETY DATA SHEET (MSDS). ESSENTIAL RECORD - Needs security microfilm backup -See remarks.	OPR	30 years	Destroy when obsolete or superseded	GS50-19-11	Please reference WAC 296-62-05207. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
14	NOTIFICATION OF DANGEROUS WASTE ACTIVITY – HAZARDOUS MATERIALS ADMINISTRATION.	OPR	Destroy when superseded or when item is no longer on hand	Destroy when obsolete or superseded	GS50-19-13	
15	PHYSICAL EXAMINATION REPORTS FOR EMPLOYEES EXPOSED TO HAZARDOUS MATERIALS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-19-01	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

HAZARDOUS MATERIALS ADMINISTRATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
16	<p>REMEDIAL SITE FILES - SUPERFUND SITE-SPECIFIC Contains all documents relating to: chemical analysis services performed to support Superfund remedial and removal site-specific records relating to removal activities and activities conducted at remedial sites. Examples: Correspondence, quality assurance plans, endangerment assessment, risk assessment, health and safety plans, potentially responsible party searches and investigations, projects operations plans, remedial investigation reports, feasibility studies, Comprehensive Environmental Response, Compensation, and Liability Information System (CIRCLIS) Superfund removal records, removal response files.</p> <p>ESSENTIAL RECORD – Needs security backup – See remarks</p> <p>New series – 06/04</p>	OPR	Submission of final financial status report plus 10 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-19-14	<p>This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.</p> <p>Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.</p> <p>Reference 40CFR35.6705.</p>
17	<p>SUPERFUND TOXIC CHEMICAL RELEASE FILES Contains documents relating to requirement for submission of information relating to the release of toxic chemicals under Section 313 SARA Title III – Emergency Planning and Community Right-to-Know Act (EPCRA). Information collected is intended to inform the general public and the communities surrounding covered facilities about releases of toxic chemicals. Includes EPA forms, inspection reports, consent agreements, and other information for listed toxic chemicals.</p> <p>New series – 06/04</p>	OPR	Submission of final financial status report plus 10 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-19-15	<p>Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.</p> <p>Reference 40CFR35.6705.</p>

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: HOUSING AUTHORITIES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

HOUSING AUTHORITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ACCESS CARD CARDEX – HOUSING AUTHORITIES Record of entry cards issued. Includes completed access forms and shows level of access issued.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-01	
2	ALLOCATIONS – HOUSING AUTHORITIES Allocation plans for each fiscal year, overhead and distributed costs for funds.	OFM	3 years	Destroy when obsolete or superseded	GS60-01-02	
3	APARTMENT INVENTORY AND INSPECTION REPORT – HOUSING AUTHORITIES	OFM	3 years after vacation	Destroy when obsolete or superseded	GS60-01-03	
4	ASSET MANAGEMENT FILES – HOUSING AUTHORITIES Real property records. A centralized location for various real estate functions of Housing Authorities.	OPR	Sale of property plus 10 years. Potential archival value – See remarks.	Destroy when obsolete or superseded	GS60-01-04	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	BILLING FILES REQUESTS FOR PAYMENT – HOUSING AUTHORITIES Includes backup paperwork to track vendor, (temporary employees) requests for payment.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-05	
6	BOND PROJECT FILES – HOUSING AUTHORITIES Contract, correspondence and other legal documents for bond projects (conduit & non-conduit).	OPR	6 years after redemption of project or building bonds	Destroy when obsolete or superseded	GS60-01-06	
7	COLLECTION LOSS REPORT – HOUSING AUTHORITIES Delinquent tenant account report	OPR	6 years	Destroy when obsolete or superseded	GS60-01-07	
8	COMMUNITY FILES – HOUSING AUTHORITIES Correspondence, resident organization by-laws, invoices, records of payment, and legal classification folders. Accounting has original invoices and payments.	OFM	3 years. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-08	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

HOUSING AUTHORITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
9	DETAILED CONSTRUCTION ANALYSIS FILES – HOUSING AUTHORITIES	OFM	Completion of project plus 10 years. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-09	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
10	DEVELOPMENT CONTRACT REGISTER – HOUSING AUTHORITIES	OFM	2 years after audit of development costs	Destroy when obsolete or superseded	GS60-01-10	
11	DISPOSITION RECORDS OF PERSONAL PROPERTY – HOUSING AUTHORITIES	OPR	6 years	Destroy when obsolete or superseded	GS60-01-11	
12	ENTRY / EXIT VIDEOS – HOUSING AUTHORITIES Video tapes of entrances / exits monitoring who arrives and leaves	OFM	30 days	Destroy when obsolete or superseded	GS60-01-12	
13	EQUIPMENT LOAN AGREEMENTS – HOUSING AUTHORITIES Traces location of loaned equipment within the agency. Includes types of equipment, serial number, dates loaned, and dates returned.	OFM	1 year	Destroy when obsolete or superseded	GS60-01-13	
14	HOUSING GRIEVANCE HEARING COORDINATOR ARBITRATION FILES – HOUSING AUTHORITIES Arbitration files/grievance hearings.	OPR	Termination of lease agreement plus 6 years	Destroy when obsolete or superseded	GS60-01-14	
15	HUD 50058 – PUBLIC HOUSING REPORTS Tenant status records that are electronically sent to HUD monthly.	OFM	3 years	Destroy when obsolete or superseded	GS60-01-27	
16	HUD 50059 – SECTION 8 REPORTS Tenant status records that are electronically sent to HUD monthly.	OFM	3 years	Destroy when obsolete or superseded	GS60-01-28	
17	HUD 51245 REPORT Regular reexamination of families in low-income public housing.	OFM	4 years after completion of audit.	Destroy when obsolete or superseded	GS60-01-31	
18	HUD 52267 Computation of payments in lieu of taxes.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-15	
19	HUD 52295 Delinquency report statement of tenants accounts receivable.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-16	
20	HUD 52598 Analysis of non-routine expenditures.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-17	

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ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
21	HUD 52599 Statement of operating receipts and expenditures	OPR	6 years	Destroy when obsolete or superseded	GS60-01-18	
22	HUD 52601 Balance sheet preliminary loan period.	OPR	10 years after completion of audit	Destroy when obsolete or superseded	GS60-01-19	
23	HUD 52602 Statement of preliminary planning cost.	OPR	10 years after completion of audit	Destroy when obsolete or superseded	GS60-01-20	
24	HUD 52603 Statement of initial operating income and expenses.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-21	
25	HUD 52681 Voucher for payment of annual contributions for HAP (Housing Assistance Program).	OPR	6 years	Destroy when obsolete or superseded	GS60-01-22	
26	HUD 52682 Operating statement – Housing assistance payments program.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-23	
27	HUD 52981 Statement and voucher for basic annual contributions.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-24	
28	HUD 52982 Statement and voucher for contributions for special subsidy families leased housing.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-25	
29	HUD 52993 Statement of modernization cost.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-26	
30	HUD 53001 – ACTUAL MODERNIZATION COST CERTIFICATE New series-07/03	OPR	End of fiscal year plus 6 years	Destroy when obsolete or superseded	GS60-01-60	
31	HUD COMPLAINT LOG	OFM	6 years	Destroy when obsolete or superseded	GS60-01-29	
32	HUD SUBSIDIES LOG & SPREADSHEETS Cash worksheets, master control worksheets, and supporting documents.	OPR	10 years after expiration of grant	Destroy when obsolete or superseded	GS60-01-30	
33	MASTER PLANNING FILES FOR RE-DEVELOPMENT – HOUSING AUTHORITIES Annual plan concept documents, materials work-up, financial reports, and working papers.	OFM	Destroy when obsolete or superseded – Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-32	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

**GENERAL RECORDS RETENTION SCHEDULE FOR
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HOUSING AUTHORITIES

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
34	PESTICIDE APPLICATION PERMITS – HOUSING AUTHORITIES Application permits from the State Department of Agriculture for the application of pesticides (kept in maintenance offices).	OPR	Expiration plus 6 years	Destroy when obsolete or superseded	GS60-01-33	
35	PFS OPERATING SUBSIDY REQUEST – HOUSING AUTHORITIES Revisions and HUD approval request for operating funds for the Public Housing Program, mid-year revisions, HUD approval. Includes HUD forms 52723, 52721, 52722-A, etc.	OPR	6 years	Destroy when obsolete or superseded	GS60-01-34	
36	POLICE REPORTS – HOUSING AUTHORITIES Police department incident reports, evidence for evictions.	OFM	Law enforcement agency keeps primary copy 6 years past statute of limitations period	Destroy when obsolete or superseded	GS60-01-35	
37	POPULATION REPORT STATISTICS – HOUSING AUTHORITIES	OFM	PERMANENT. 1 copy archival – See remarks	Destroy when obsolete or superseded	GS60-01-36	Please contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
38	PRELIMINARY LOAN NOTES – HOUSING AUTHORITIES Modern Rehabilitation Loans, preliminary loan notes, including related documents and correspondence, and preliminary planning cost ledger.	OPR	6 years after audit and payment of note	Destroy when obsolete or superseded	GS60-01-37	
39	PROGRAMS NOT APPROVED OR NON-GRANT PROGRAMS DEVELOPED BY THE DEPARTMENT – HOUSING AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS60-01-38	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
40	<p>PROPERTY HISTORY FILES – HOUSING AUTHORITIES Includes: Miscellaneous information that includes site maps; racial composition maps; Acquisition documents, appraisal, declaration of trust, residential purchase and sale agreement, HUD approval of purchase, warranty deed, HUD settlement statements; Property use documents, including preliminary title, supplementary title reports, easement and other legal descriptions; CDBG (funding of purchase documents); Survey information. Note these files are transferred to legal counsel). Real property file containing copy of warranty deed, copy of title reports, site maps and related documents and correspondence; Survey files containing copy of survey and related information; Risk assessment and lead file containing copy of original lead based paint test results and copy of abatement and enclosure summary, and related correspondence; Needs assessment files, continuing needs assessment surveys and related information; Property miscellaneous information file.</p> <p>ESSENTIAL RECORD – Needs security backup– See remarks.</p>	OPR	Sale of property plus 6 years. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-39	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
41	<p>PUBLIC HOUSING ASSESSMENT PROGRAMS – HOUSING AUTHORITIES Includes but is not limited to Public Housing Management Assessment Program (PHMAP), Public Housing Assessment (PHA), Section 8 Assessment</p>	OPR	6 years. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-40	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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HOUSING AUTHORITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
42	PUBLIC HOUSING REDEVELOPMENT FILES – HOUSING AUTHORITIES Working files for redevelopment projects.	OFM	10 years. Potential archival value – See remarks.	Destroy when obsolete or superseded	GS60-01-41	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
43	REHABILITATION PROGRAM BLOCK GRANT FILES – HOUSING AUTHORITIES	OPR	6 years after end of grant year	Destroy when obsolete or superseded	GS60-01-42	
44	RELOCATION CHECK REQUEST COPIES – HOUSING AUTHORITIES	OPR	10 years after grant expiration	Destroy when obsolete or superseded	GS60-01-43	
45	RENT ROLL CONTROL AND ANALYSIS FILE – HOUSING AUTHORITIES Rent roll control and analysis of dwelling rent charges (filed in tenant files).	OPR	6 years after completion of audit. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-44	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
45	REQUEST FOR REFUND OF SECURITY DEPOSIT AND UNEARNED RENT – HOUSING AUTHORITIES Filed with tenant files.	OPR	6 years after vacation If delinquent, 7 years after vacation	Destroy when obsolete or superseded	GS60-01-45	
46	SALE OF PROPERTY DOCUMENTS – HOUSING AUTHORITIES Bid and contract forms, bills of sale, and other documents evidencing sale. Transactions; 1) \$1,000 or less, 2) \$1,001 to \$25,000, 3) \$25,000 plus; includes surplus property inventory.	OPR	6 years after final payment	Destroy when obsolete or superseded	GS60-01-46	
47	SCHEDULES OF MAXIMUM INCOME LIMITS – HOUSING AUTHORITIES Includes related materials (filed in tenant files).	OFM	1 year after schedule suspended. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-47	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
48	TAX EXEMPT OBLIGATION – HOUSING AUTHORITIES Records of bonds issued for a non-profit such as a neighborhood association.	OPR	6 years after satisfaction of obligation.	Destroy when obsolete or superseded	GS60-01-48	
49	TENANT APPLICATION CRIMINAL RECORD CHECKS – HOUSING AUTHORITIES Includes criminal conviction records removed from approved file.	OFM	5 years	Destroy when obsolete or superseded	GS60-09-49	

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HOUSING AUTHORITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
50	TENANT APPLICATION FILES (ELIGIBLE) – HOUSING AUTHORITIES Series revised: Changed retention period from “until placed,” and added CFR References to Remarks – 12/03	OFM	Termination of lease plus 3 years	Destroy when obsolete or superseded	GS60-01-50	Reference 24 CFR 982.158(f)(1-8), 24 CFR 84.53(b), and 24 CFR 901.155.
51	TENANT APPLICATION FILES (INELIGIBLE OR WITHDRAWN) – HOUSING AUTHORITIES Series revised: Changed retention period from “3 years” and added CFR References to Remarks – 12/03	OFM	Application withdrawn or determined ineligible plus 3 years	Destroy when obsolete or superseded	GS60-01-51	Reference 24 CFR 982.158(f)(1-8), 24 CFR 84.53(b), and 24 CFR 901.155.
52	TENANT FILES – HOUSING AUTHORITIES Series revised: Changed retention from “6 years after vacation. If delinquent, 7 years after vacation,” and added CFR References to Remarks – 12/03	OFM	Termination of lease plus 3 years	Destroy when obsolete or superseded	GS60-01-52	Reference 24 CFR 982.158(f)(1-8), 24 CFR 84.53(b), and 24 CFR 901.155.
53	TENANT FILES SECTION 8 – HOUSING AUTHORITIES Damage claim files, money owing, no money owing.	OPR	Termination of lease plus 6 years	Destroy when obsolete or superseded	GS60-01-53	
54	TENANT GRIEVANCE FILES – HOUSING AUTHORITIES	OPR	Termination of lease agreement plus 6 years	Destroy when obsolete or superseded	GS60-01-54	
55	TENANT HOUSING SURVEYS AND CENSUS TABULATIONS – HOUSING AUTHORITIES	OFM	Destroy when obsolete or superseded. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-55	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
56	TENANT LEASED HOUSING – OWNER’S RECORDS Includes leases, amendments and renewals, notices, correspondence, property change form (owner’s folder copy and ED copy)	OPR	Termination of lease plus 6 years	Destroy when obsolete or superseded	GS60-01-56	
57	TENANT WAITING LIST – PUBLIC HOUSING New series 02/04	OFM	Fiscal year plus 3 years	Destroy when obsolete or superseded	GS60-01-61	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

HOUSING AUTHORITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
58	TENANT WAITING LIST – SECTION 8 HOUSING New series 02/04	OFM	Fiscal year plus 3 years	Destroy when obsolete or superseded	GS60-01-62	
59	UTILITIES REVIEW FILES – HOUSING AUTHORITIES	OPR	6 years	Destroy when obsolete or superseded	GS60-01-57	
60	UTILIZATION REPORTS – HOUSING AUTHORITIES	OFM	3 years. Potential archival value – See remarks	Destroy when obsolete or superseded	GS60-01-58	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
61	VAN LOADERS MANIFESTS – HOUSING AUTHORITIES Van loaders manifest for material taken from inventory to sites for repairs/maintenance, including adjustment sheets.	OFM	3 years	Destroy when obsolete or superseded	GS60-01-59	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: INSURANCE, RISK MANAGEMENT, AND SAFETY

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

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General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

INSURANCE, RISK MANAGEMENT, AND SAFETY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ACCIDENT CLAIMS FOR DAMAGES FILED EITHER AGAINST THE AGENCY BY OTHER PARTIES, OR BY THE AGENCY AGAINST OTHER PARTIES Includes vehicle accidents. Series revised – Removed “INJURY” from title, and changed primary copy retention from “Settlement plus 6 years” – 03/03	OPR	Claim closed plus 6 years	Destroy when obsolete or superseded	GS50-06C-12	
2	AUDIOMETRIC TEST RECORDS – INDIVIDUAL EMPLOYEE Series revised – Added “Individual Employee” to title – 04/04	OFM	Retain for the duration of the affected employee's employment – See remarks	Destroy when obsolete or superseded	GS51-05D-10	Reference WAC 296-62-09041 (4b).
3	CLAIMS COSTS REPORTS OR STATEMENTS Compilation of costs of processing claims against self-insured liabilities. Series revised – Changed title from “REPORTS OR STATEMENTS OF CLAIMS COSTS” – 03/03	OFM	4 years	Destroy when obsolete or superseded	GS50-06C-24	
4	DISASTER/EMERGENCY MANAGEMENT PLAN ESSENTIAL RECORD - Needs security microfilm backup - See remarks Series revised – Changed primary copy retention from PERMANENT – 03/03	OPR	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-06C-07	This records series should be protected from loss or damage by offsite storage of a security microfilm backup. Security microfilm must meet Washington State Archives technical standards.
5	EMPLOYER'S QUARTERLY REPORT FOR INDUSTRIAL INSURANCE (WORKER'S COMPENSATION) Series revised – Changed title from “COMPENSATION QUARTERLY REPORTS” 03/03	OFM	Department of Labor and Industries retains primary copy 6 years	Retain 1 copy for 3 years. All other copies, destroy when obsolete or superseded	GS50-06C-06	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

INSURANCE, RISK MANAGEMENT, AND SAFETY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
6	ERGONOMIC FILES Ergonomic files document the analysis, action, and measures taken to adjust workplace environment to help prevent work-related injuries. Files include name of employee, supervisor, organization unit, location, and action taken to adjust workstation or environment. New series – 09/04	OFM	Last action taken plus 3 years	Destroy when obsolete or superseded	GS51-05D-11	
7	FACILITY SAFETY INSPECTION HISTORY RECORDS Cumulative record showing inspection citations, corrections, and other information relating to the continuing safety of each agency facility. Series revised – Added “SAFETY” to title, and removed “or sale” and “plus 10 years” from primary copy retention – 03/03	OFM	Disposition of facility	Destroy when obsolete or superseded	GS50-06C-08	
8	FEDERAL EMERGENCY MANAGEMENT AGENCY (FEMA) CLAIMS Federal claims made following disasters. New series – 03/03	OPR	Claim closed plus 6 years	Destroy when obsolete or superseded	GS50-06C-32	
9	FIDELITY AND SURETY COVERAGE BONDS	OPR	Termination of policy plus 6 years	Destroy when obsolete or superseded	GS50-06C-09	
1	FIRE ALARM APPLICATION	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-06C-11	
1	FIRE AND OTHER EMERGENCY DRILL REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06C-10	
1	FIRE INSPECTION REPORT Series deleted – Covered under “INSURANCE, SAFETY AND FIRE INSPECTION REPORTS” – 03/03	OPR	Termination of policy plus 6 years	Destroy when obsolete or superseded	GS50-06C-14	
1	HOLD HARMLESS AGREEMENTS	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-06C-13	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

INSURANCE, RISK MANAGEMENT, AND SAFETY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	INCIDENT REPORTS FILED BY EMPLOYEES OR STUDENTS Series revised – Changed title from “ACCIDENT/ INJURY REPORTS – STUDENT,” changed from OPR, changed primary copy retention from Age 21 or 3 years after accident/injury, whichever is longer, changed secondary copy retention from 3 years, and removed “If records are not readily separable, a blanket retention period of 20 years is recommended” – 03/03	OFM	Incident resolved plus 2 years	Destroy when obsolete or superseded	GS50-06C-03	
1	INDUSTRIAL HYGIENE MONITORING FILES Files document the monitoring of agency work environments for industrial health issues. May be for air quality, noise level, presence of chemicals, etc. Includes sample, test results, corrective action taken if any, etc. New series – 04/04	OPR	30 years	Destroy when obsolete or superseded	GS50-06C-33	
1	INDUSTRIAL INSURANCE CLAIM LOG	OFM	3 years	Destroy when obsolete or superseded	GS50-06C-01	
1	INSURANCE AUDITS, SURVEYS, REPORTS To document and analyze the coverage, premium costs, and self-insurance costs.	OFM	4 years	Destroy when obsolete or superseded	GS50-06C-15	
1	INSURANCE POLICIES PURCHASED Includes accident/injury, sickness, automobile, theft, fire liability, life, and all other insurance policies purchased by the agency. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Termination of policy plus 6 years	Destroy when obsolete or superseded	GS50-06C-16	The Local Records Committee suggests that policies, which allow claims retroactive to their period of coverage, should be retained permanently. Consult your risk manager. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

INSURANCE, RISK MANAGEMENT, AND SAFETY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	INSURANCE POLICY CERTIFICATES ESSENTIAL RECORD – Needs security microfilm backup – See remarks <i>Series revised – Changed title from “CERTIFICATES OF INSURANCE,” increased primary copy retention from “6 years,” and added Essential Record statement – 03/03</i>	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-06C-04	This records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
2	INSURANCE WAIVERS	OPR	6 years	Destroy when obsolete or superseded	GS50-06C-17	
2	INSURANCE, SAFETY AND FIRE INSPECTION REPORTS <i>Series revised – Changed primary copy retention from “Termination of policy plus 6 years” – 03/03</i>	OFM	Violation corrected plus 6 years	Destroy when obsolete or superseded	GS50-06C-18	
2	MONTHLY STATEMENT OF BENEFITS PAID	OPR	6 years	Destroy when obsolete or superseded	GS50-06C-19	
2	NOISE EXPOSURE REPORTS – INDIVIDUAL EMPLOYEE <i>Series revised – Added “Individual Employee” to title – 04/04</i>	OFM	2 years– See remarks	Destroy when obsolete or superseded	GS50-06C-29	Reference WAC 296-62-09041 (4a).
2	OCCUPATIONAL INJURIES AND ILLNESSES U.S. BUREAU OF LABOR STATISTICS LOG AND SUMMARY	OFM	5 years	Destroy when obsolete or superseded	GS50-06C-21	
2	PENALTY ASSESSMENT NOTIFICATION <i>Series revised – Changed title from “NOTIFICATION OF PENALTY ASSESSMENT” – 03/03</i>	OPR	6 years	Destroy when obsolete or superseded	GS50-06C-20	
2	REFERENCE AND INFORMATION MATERIALS RECEIVED FROM SAFETY AGENCIES Bulletins, pamphlets, notices, posters, etc.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS51-05D-04	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

INSURANCE, RISK MANAGEMENT, AND SAFETY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
2	REPORT OF INDUSTRIAL INJURY OR OCCUPATIONAL DISEASE Accident claim reports for employees of agencies either insured by Labor & Industries or self-insured. Series revised – Changed title from “ACCIDENT/INJURY REPORTS – EMPLOYEES – INSURED BY LABOR AND INDUSTRIES OR NOT REPORTABLE TO LABOR AND INDUSTRIES,” changed from OPR, changed primary copy retention from Settlement plus 6 years, and changed secondary copy retention from Destroy when obsolete or superseded 03/03	OFM	LABOR & INDUSTRIES RETAINS: For compensable claims – claim closed plus 75 years For non-compensable claims – claim closed plus 10 years	For 1 copy, retain as follows: For compensable claims – claim closed plus 10 years For non-compensable claims – claim closed plus 5 years For all other copies: Destroy when obsolete or superseded	GS50-06C-02	
2	RESPIRATOR FIT TEST RECORDS	OFM	Destroy after next test administered– See remarks	Destroy when obsolete or superseded	GS51-05D-07	Reference WAC 296-62-07194 (3).
2	RESPIRATOR PROGRAM FILES	OFM	Destroy when obsolete or superseded– See remarks	Destroy when obsolete or superseded	GS51-05D-08	Reference WAC 296-62-07194 (4).
3	RISK DATA Information compiled on the costs, liability for risks to which the agency is exposed, and the allocation of expense required to support the risk management program.	OFM	4 years	Destroy when obsolete or superseded	GS50-06C-25	
3	SAFETY COMMITTEE MINUTES	OFM	1 year	Destroy when obsolete or superseded	GS51-05D-09	Reference WAC 296-62-045(4).
3	SAFETY INSPECTION, STATE NOTICE AND CITATION Series deleted – Covered under “FACILITY SAFETY INSPECTION HISTORY RECORDS” 03/03	OPR	6 years	Destroy when obsolete or superseded	GS51-05D-05	
3	SELF-INSURED AGENCY WORKER’S COMPENSATION CLAIMS – NON-COMPENSABLE New series – 03/03	OFM	Labor and Industries retains 10 years after close of claim	Retain 1 copy for 5 years after close of claim. For all other copies, destroy when obsolete or superseded	GS50-06C-31	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

INSURANCE, RISK MANAGEMENT, AND SAFETY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
3	<p>SELF-INSURED AGENCY WORKER'S COMPENSATION CLAIMS – COMPENSABLE</p> <p>Series revised – Changed title from “Worker’s Compensation and Employee Liability Claims,” changed primary copy retention from “Department of Labor and Industries retains primary copy – PERMANENT, changed secondary record copy from “Last payment plus completion of audit,” and removed remarks – 03/03</p>	OPR	Labor and Industries retains 75 years after close of claim	Retain 1 copy for 10 years after close of claim. For all other copies, destroy when obsolete or superseded	GS50-06C-27	
3	<p>SELF-INSURED EMPLOYER CERTIFICATION</p> <p>Series revised – Changed title from “CERTIFICATION OF EMPLOYER AS SELF-INSURER,” and added “plus 2 years” to secondary copy retention - 03/03</p>	OFM	Department of Labor and Industries retains primary copy - Termination plus 6 years	Retain 1 copy until certification withdrawn or surrendered plus 2 years. For all other copies, destroy when obsolete or superseded	GS50-06C-05	
3	<p>WORKPLACE HAZARD ASSESSMENT CERTIFICATION</p> <p>Includes name of workplace, address of workplace inspected for hazards, name of person certifying assessment was done, date(s) assessment done, and statement identifying the document as the certification of assessment for the workplace.</p> <p>Series revised – Added description – 04/04</p>	OPR	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS51-05D-06	Reference WAC 296-800-16010.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: IRRIGATION UTILITIES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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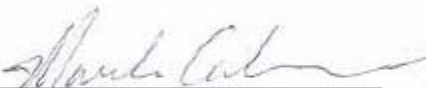
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

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Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

IRRIGATION UTILITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	FORECLOSURE FILES – IRRIGATION UTILITIES	OPR	Foreclosure of account plus 6 years	Destroy when obsolete or superseded	GS50-32-01	
2	LAND OWNER WATER QUALITY VIOLATION FILES – IRRIGATION UTILITIES Includes landowner water quality plans submitted to resolve violations.	OPR	Resolution plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-32-03	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3	LAND USE HISTORY FILES – IRRIGATION UTILITIES Includes water right contracts, permits, easements, reclassification, water allotment and other land use documentation for district service area organized by section, township and range. ESSENTIAL RECORD – Needs security backup - See remarks.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-32-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
4	LINE LOCATION REQUESTS – IRRIGATION UTILITIES	OFM	1 year	Destroy when obsolete or superseded	GS50-32-05	
5	PESTICIDE SPRAY APPLICATION DOCUMENTATION Includes location and crop or site where applied, date and time application of pesticide was applied, product name and environmental protection agency registration number, amount and concentration of pesticide applied, number of acres or other appropriate measure to which pesticide applied, licensed applicator's information, direction/estimated velocity of wind at time of application, etc. Revised Series – 02/02	OPR	7 years	Destroy when obsolete or superseded	GS50-18-43	Reference RCW 17.21.100 (3)
6	WATER DIVERSION REPORTS – IRRIGATION UTILITIES	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-32-06	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

IRRIGATION UTILITIES

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	WATER QUALITY MONITORING DATA – IRRIGATION UTILITIES	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-32-07	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
8	WATER USE REPORTS – IRRIGATION UTILITIES	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-32-08	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: JUVENILE SERVICES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

JUVENILE SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	AUDIO AND VIDEO RECORDINGS OF JUVENILE COURT PROCEEDINGS	OFM	Until expiration of appeal period	Destroy when obsolete or superseded	GS50-28-01	
2	CUSTODY INVESTIGATIONS – JUVENILE SERVICES Department working files containing copies of marriage and dissolution orders, custody orders, petition and show cause orders, reports of custody investigations, together with medical psychological reports, probation officer's working papers includes investigations for other states.	OFM	5 years beyond age of 18	Destroy when obsolete or superseded	GS50-28-02	Reference RCW 26.09.220.
3	DAILY RECORDINGS OF JUVENILE COURT DOCUMENTS Microfilm copies of individual documents filed in Juvenile Court proceedings. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT, or may be sealed, expunged or destroyed at the request of subjects who have cleared diversion requirements – See remarks	Permanent security backup may be held at the State Archives in Olympia – See remarks	GS50-28-03	Reference RCW 13.50.050, Subsections 16 and 17. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
4	DETENTION LOG – JUVENILE SERVICES ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	6 years	Destroy when obsolete or superseded	GS50-28-04	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
5	DETENTION ROSTER– JUVENILE SERVICES ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	1 year	Destroy when obsolete or superseded	GS50-28-05	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
6	DOCKETS – JUVENILE COURT ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT, or may be sealed, expunged or destroyed at the request of subjects who have cleared diversion requirements – See remarks	Destroy when obsolete or superseded	GS50-28-06	Reference RCW 13.50.050, Subsections 16 and 17. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
7	FOSTER CARE FILES – JUVENILE SERVICES	OPR	8 years or 3 years beyond age of 18, whichever is longer	Destroy when obsolete or superseded	GS50-28-07	Reference RCW 13.34.136, and 13.34.231.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

JUVENILE SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
8	GUARDIAN AD-LITUM REPORTS – JUVENILE SERVICES	OPR	8 years or 3 years beyond age of 18, whichever is longer	Destroy when obsolete or superseded	GS50-28-08	Reference RCW 13.34.105, and 26.09.220.
9	JUVENILE COURT CASE FILE INDEXES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OFM	PERMANENT, or entries may be expunged at the request of subjects who have cleared diversion requirements – See remarks	Destroy when obsolete or superseded	GS50-28-09	Reference RCW 13.50.050, Subsections 16 and 17. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
10	JUVENILE COURT CASE FILES Official documentation of Juvenile Court hearings and actions. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT, or may be sealed, expunged or destroyed at the request of subjects who have cleared diversion requirements – See remarks	Destroy when obsolete or superseded	GS50-28-10	Reference RCW 13.50.050, Subsections 16 and 17. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
11	MARRIAGE WAIVER – JUVENILE SERVICES Petition to waiver of law prohibiting marriage before age of 18. May contain probation officer's investigation and recommendations. Series revised –Deleted comments from instructions – 07/03	OFM	5 years beyond age of 18	Destroy when obsolete or superseded	GS50-28-11	Reference RCW 26.04.010.
12	MEDICAL HISTORY FILES – JUVENILE SERVICES ESSENTIAL RECORD - Needs security backup - See remarks. Series revised –Deleted comments from instructions – 07/03	OPR	5 years beyond age of 18	Destroy when obsolete or superseded	GS50-28-12	Reference RCW 13.50.050. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

JUVENILE SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
13	<p>SOCIAL FILES – JUVENILE SERVICES Department working files containing copies of Court Orders, medical/psychological reports, pre-sentence reports, probation officers working reports, diversion files, and dependency documentation.</p> <p>ESSENTIAL RECORD - Needs security backup - See remarks.</p> <p>Series revised – Added “diversion files” to description. Revised Primary Record Copy Retention Period and Remarks – 07/03</p>	OPR	5 years beyond age of 18 except that Diversion files may otherwise be destroyed according to the provisions of RCW 13.50.050 (22) (a) – See remarks	Destroy when obsolete or superseded	GS50-28-13	<p>Reference RCWs 13.34, 13.50.050.22 and 13.50.100. Regarding Juvenile Diversion Files: RCW 13.50.050 (22) (a) “Records may be routinely destroyed only when the person the subject of the information or complaint has attained twenty-three years of age or older, or is eighteen years of age or older and his or her criminal history consists entirely of one diversion agreement and two years have passed since completion of the agreement.”</p> <p>This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.</p>

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: LAND USE PLANNING, PERMITS, AND APPEALS

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ADMINISTRATIVE APPEALS CASE FILES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-16B-01	Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
2	ANNEXATION AND BOUNDARY REVIEW FILES	OFM	Either the County Assessor or the Boundary Review Board retains - PERMANENT - See remarks	Destroy when maps and reference files are updated	AS52-03A-05	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3	ANNEXATION HISTORY FILES Core documentation of the process of annexation. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-16-09	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
4	APPEAL HEARINGS AUDIO/VIDEO RECORDINGS AND TRANSCRIPTIONS Series revised – Changed retention: replaced “settlement” with “final disposition – 01/05	OPR	6 years after final disposition of case	Destroy when obsolete or superseded	GS50-16B-03	
5	APPEAL HEARINGS CASE FILES Series revised – Changed retention: replaced “settlement” with “final disposition – 01/05	OPR	6 years after final disposition of case	Destroy when obsolete or superseded	GS50-16B-02	
6	APPLICATIONS AND APPROVAL DOCUMENTATION FOR BUILDING CONSTRUCTION AND MODIFICATION PERMITS	OFM	Completion of project and/or certificate of occupancy	Destroy when obsolete or superseded	GS50-11-01	

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	APPROVED (BINDING) SITE PLANS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Life of building plus 6 years OR until subsequent permits changing the site plan is issued.	Destroy when obsolete or superseded	GS50-11-02	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives standards.
8	APPROVED CONSTRUCTION DRAWINGS, PLANS, AND SPECIFICATIONS Series revised: Removed "Uniform Building Code reference from Special and or Disposition Instructions Column – 06/04	OFM	Completion of project plus 90 days - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-11-03	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
9	BUILDING CONSTRUCTION AND MODIFICATION PERMIT FILES (VALID) Long term official documentation for all permitted projects, including permit, project inspection records, certificate of occupancy, administrative decisions, legal actions, statements of alternate methods of construction, variances, and special conditions. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Life of building plus 6 years	Destroy when obsolete or superseded	GS50-11-05	This records series should be protected from loss or damage by offsite storage of a security microfilm backup. Security microfilm must meet Washington State Archives standards.
10	BUILDING CONSTRUCTION AND MODIFICATION PERMIT FILES (INVALID) Permits issued in error in relation to code or jurisdiction.	OFM	3 years	Destroy when obsolete or superseded	GS50-11-08	
11	BUILDING CONSTRUCTION AND MODIFICATION PERMIT INDEXES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OFM	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-11-06	Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet State Archives standards.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
12	BUILDING INSPECTION REPORTS – EXISTING BUILDINGS	OPR	6 years	Destroy when obsolete or superseded	GS50-11-07	
13	BURNING PERMITS	OPR	3 years	Destroy when obsolete or superseded	GS53-04-06	
14	CODE COMPLAINT & VIOLATION CASE FILES Includes complaints, abatement notices, other notices, and other information created or compiled during the course of investigation and resolution of each alleged violation.	OPR	6 years after final action on violation	Destroy when obsolete or superseded	GS50-11-04	
15	COMPREHENSIVE LAND USE PLAN AND AMENDMENTS Includes amendments, and Growth Management Act appeal determinations that amend the Comprehensive Plan. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value -See remarks	Until obsolete or superseded	GS50-16-01	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
16	COMPREHENSIVE LAND USE PLAN HISTORY FILES	OFM	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-16-08	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
17	CONDITIONAL USE PERMITS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-16B-04	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
18	CRITICAL MATERIALS LIST A list of chemical types and quantities for critical (hazardous) materials stored on a site as per regulations. ESSENTIAL RECORD – Needs security microfilm backup - See remarks.	OPR	Life of approved activity	Destroy when obsolete or superseded	GS50-11-10	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
19	HAZARDOUS WASTE DISPOSAL PERMITS New series – 06/02	OPR	30 years	Destroy when obsolete or superseded	GS55-01M-04	Reference WAC 173.303.281, and WAC 173.303.806.
22	LONG TERM RIGHT-OF-WAY USE PERMITS	OPR	Termination of use plus 6 years	Destroy when obsolete or superseded	GS50-11-22	
23	MAJOR LAND DEVELOPMENT CASE FILES Includes major land use developments such as planned unit developments, planned development districts, and major platted subdivisions.	OFM	5 years after completion of development - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-11-11	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
24	MAPS, DRAWINGS, PHOTOGRAPHS (OFFICIAL) Official representation of comprehensive plan, shoreline management, and zoning boundaries established and/or enforced by the agency. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Until obsolete or superseded	GS50-16-02	Photographic negatives may be held in Regional Archives for permanent preservation and security backup. Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
25	MAPS, DRAWINGS, PHOTOGRAPHS (REFERENCE) Illustrations prepared or collected to capture background information on land use conditions for staff reference and public information. Photographic negatives may be held in Regional Archives for permanent preservation and security backup - See remarks.	OFM	Until obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-16-03	Contact your Regional Archivist before disposing of this record or to discuss transfer of negatives for permanent preservation and security backup. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
26	OPEN SPACE CLASSIFICATION CASE FILES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Change of use plus 6 years	Destroy when obsolete or superseded	AS01-03B-03	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
27	PLAT CASE FILES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-11-12	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
28	REFERRED PROJECT FILES Project plans and statements referred from other agencies for land use planning review.	OFM	3 years	Destroy when obsolete or superseded	GS50-16-04	
29	SEPA (STATE ENVIRONMENTAL POLICY ACT) DETERMINATION OF SIGNIFICANCE OR NONSIGNIFICANCE ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-11-13	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
30	SEPA (STATE ENVIRONMENTAL POLICY ACT) ENVIRONMENTAL CHECKLIST ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Life of approved activity	Destroy when obsolete or superseded	GS50-11-14	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
31	<p>SEPA (STATE ENVIRONMENTAL POLICY ACT) ENVIRONMENTAL IMPACT STATEMENTS</p> <p>Submitted to and accepted by the agency as part of its building code enforcement duties.</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OPR	Life of approved activity - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-11-17	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
32	<p>SHORELINE MANAGEMENT PERMITS</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OPR	Life of approved activity - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-11-15	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
33	<p>SHORELINE MANAGEMENT PROGRAM PLAN AND AMENDMENTS</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-16-05	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
34	SHORT PLAT CASE FILES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-11-16	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
35	SURVEYS, STUDIES AND REPORTS Includes Growth Management Act Comprehensive Plan drafts.	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-32	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
36	TEMPORARY PERMITS Moving, log hauling, demolition, blasting, right of way use, et al.	OFM	3 years	Destroy when obsolete or superseded	GS50-11-18	
37	TRANSITORY BUILDING CONSTRUCTION AND MODIFICATION PERMIT PROCESSING RECORDS	OFM	Until permit issued	Destroy when obsolete or superseded	GS50-11-19	
38	UTILITY PERMIT FILES Records document the issuance for the installation, modification, and removal of utility support in the public right-of-way. Records may include permit application, copies of the permit, plans, and inspection reports. New series – 09/04	OPR	Termination of permit plus 6 years	Destroy when obsolete or superseded	GS50-16B-19	
39	VARIANCES ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-16B-06	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
40	WATER AVAILABILITY VERIFICATION	OFM	2 years	Destroy when obsolete or superseded	GS50-11-21	

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LAND USE PLANNING, PERMITS, AND APPEALS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
41	WITHDRAWN OR ABANDONED LAND USE, BUILDING CONSTRUCTION, AND MODIFICATION PERMIT APPLICATIONS, APPEALS, AND SUPPORT DOCUMENTATION May include permits issued but work not started within 180 days. Series revised - Added series description, reduced retention from 3 years and added code number to remarks column – 04/04	OFM	Destroy after permit abandoned or withdrawn	Destroy when obsolete or superseded	GS50-11-23	
42	ZONING ENFORCEMENT CASE FILES	OFM	2 years	Destroy when obsolete or superseded	GS50-11-20	
43	ZONING EXCEPTIONS/WAIVERS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-11-21	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: LEGAL COUNSEL

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

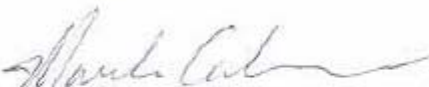
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

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Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LEGAL COUNSEL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ATTORNEY GENERAL OPINIONS	OFM	Attorney General - PERMANENT	Destroy when obsolete or superseded.	GS53-02-01	
2	BOND PROJECT FILES – LEGAL COUNSEL Contract, correspondence and other legal documents for bond projects (conduit & non-conduit).	OPR	6 years after redemption of project or building bonds	Destroy when obsolete or superseded	GS53-02-06	
3	LEGAL ISSUES/ADVICE FILES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS53-02-05	
4	LEGAL OPINIONS Official interpretations made by agency attorney regarding questions of legal rights or liabilities affecting the agency or any of its departments and offices.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS53-02-03	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	LITIGATION CASE FILES Documentation of a civil suit by the agency against another party or defense of the agency and/or agency employee against suit by another party.	OFM	Agency record copy - Case closed plus 10 years	Destroy when obsolete or superseded - Potential archival value - See remarks	GS53-02-04	Primary copies of official court documents are held permanently by the Clerk of Superior Court, or 10 years by the District or Municipal Court Administrator. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

GENERAL RECORDS RETENTION SCHEDULE FOR ALL LOCAL GOVERNMENT AGENCIES

RECORDS CATEGORY: LIBRARY

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

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When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) - are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value - The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record - This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE - UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LIBRARY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	CATALOG - LIBRARY ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-12A-01	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
2	CIRCULATION DOCUMENTATION - LIBRARY	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-12A-02	
3	CIRCULATION STATISTICAL REPORTS - LIBRARY	OFM	5 years	Destroy when obsolete or superseded	GS50-12A-03	
4	COMPLAINTS ABOUT OR REQUESTS FOR LIBRARY SERVICE	OFM	Action taken plus 1 year	Destroy when obsolete or superseded	GS50-12A-04	
5	FINE AND LOST BOOK REIMBURSEMENT ACCOUNTS	OPR	6 years	Destroy when obsolete or superseded	GS50-12A-05	
6	INTERLIBRARY LOAN DOCUMENTATION For materials lent or borrowed through agency's library. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Return of loaned material plus 6 years	Destroy when obsolete or superseded	GS50-12A-06	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
7	PETTY CASH RECORD - LIBRARY	OPR	6 years	Destroy when obsolete or superseded	GS50-12A-07	
8	SHELF LIST / INVENTORY OF HOLDINGS - LIBRARY ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Destroy when superseded plus completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-12A-08	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: LICENSES, PERMITS, FEES, AND TAXES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LICENSES, PERMITS, FEES, AND TAXES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	BUSINESS AND OCCUPATION TAX ACCOUNT LEDGERS	OPR	6 years	Destroy when obsolete or superseded	GS50-12D-01	
2	BUSINESS AND OCCUPATION TAX COMPUTATIONS AND LISTINGS	OFM	3 years	Destroy when obsolete or superseded	GS50-12D-02	
3	BUSINESS AND OCCUPATION TAX DEBIT AND CREDIT NOTICES	OFM	3 years	Destroy when obsolete or superseded	GS50-12D-03	
4	BUSINESS AND OCCUPATION TAX TRANSMITTALS Documentation of transmittal of tax revenue to finance officer.	OFM	3 years	Destroy when obsolete or superseded	GS50-12D-05	
5	BUSINESS LICENSES AND PERMITS Application, stub, correspondence, and/or copy of licenses and permits to own and operate businesses within the agency's jurisdiction.	OPR	Expiration plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-12D-06	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	BUSINESS TAX REFUND FILES Requests for refund of overpayment on quarterly or annual business taxes. Files may include request, copy of tax forms, supporting documents, review, justification for refund, approval, and signatures. New series-07/03	OPR	Refund issued or denied plus 6 years	Destroy when obsolete or superseded	GS50-12D-18	
7	CALIBRATION OF FIELD TEST STANDARDS New series-07/03	OPR	Completion of testing plus 6 years	Destroy when obsolete or superseded	GS50-12D-20	
8	COMBINED EXCISE TAX RETURNS Report and transmittal of excise taxes collected through outside sales, leases, and other such transactions. Filed with the Department of Revenue. Series revised – 07/02	OPR	Filing plus 5 years	Destroy when obsolete or superseded	GS50-12D-04	For retention period, reference RCW 82.32.070, and Department of Revenue Advisory No. 152.32.199.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LICENSES, PERMITS, FEES, AND TAXES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
9	DRINKING WATER SYSTEM PERMIT FILES Permit and monitoring report for drinking water, required for continuous system operation. Monitoring requirements of water systems are to ensure safe drinking water standards which are set by Washington State Department of Health. New series – 09/04	OPR	Termination of permit plus 6 years	Destroy when obsolete or superseded	GS50-12D-21	
10	LICENSEE AUDIT FILES Audits of businesses completed to ensure compliance with tax regulations. Files include correspondence, working papers, history of business, narrative of audit, gross income of business, deductions and business finance summary. New series-07/03	OPR	Completion of audit plus 6 years	Destroy when obsolete or superseded	GS50-12D-14	
11	LICENSEE AUDIT REPORTS – FINAL Final report of completed audits. Reports describe all findings and audit results and recommendations. New series-07/03	OPR	Completion of audit plus 6 years	Destroy when obsolete or superseded	GS50-12D-15	
12	LICENSEE AUDIT STATISTIC LOG Statistics on completed audits. Used to evaluate audit selection methodology. Includes time spent on audit, audit results, date completed, who completed audit. New series-07/03	OPR	Calendar year plus 6 years	Destroy when obsolete or superseded	GS50-12D-16	
13	LOCAL IMPROVEMENT DISTRICT ASSESSMENT ROLLS AND LEDGERS	OPR	Final payment plus 6 years	Destroy when obsolete or superseded	GS50-12D-07	
14	LOCAL IMPROVEMENT DISTRICT TAX STATEMENTS AND RECEIPTS	OPR	Final payment plus 6 years	Destroy when obsolete or superseded	GS50-12D-08	
15	MONTHLY REPORT OF FEE AND TAX COLLECTIONS	OFM	3 years	Destroy when obsolete or superseded	GS50-12D-09	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LICENSES, PERMITS, FEES, AND TAXES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
16	NON-BUSINESS LICENSES AND PERMITS Application form, stub, or copy of licenses and permits for pet and bicycle owners, parades or public gatherings, temporary use of public facilities, displays, and other non-business or occupation activities within the agency's jurisdiction.	OPR	Expiration plus 3 years	Destroy when obsolete or superseded	GS50-12D-10	
17	OCCUPATIONAL LICENSES AND PERMITS Application, stub or copy of license or permit for individuals pursuing professions and vocations, or rendering services to the public within the agency's jurisdiction.	OPR	Expiration plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-12D-12	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
18	LICENSE VIOLATIONS FILES Files document the investigation into violations of the business code by individuals holding a personal license. Includes incident report, correspondence, hearing examiner information, final decisions, monitoring information, etc. New series-07/03	OPR	Completion of suspension plus 6 years	Destroy when obsolete or superseded	GS50-12D-17	
19	REGISTERS OF LICENSES OR PERMITS ISSUED	OFM	Expiration of last entry plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-12D-13	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

LICENSES, PERMITS, FEES, AND TAXES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
20	<p>STATE AND LOCAL TAX RETURNS Returns and reports submitted for taxes paid to state an/or local government agencies. Includes but is not limited to: Sales Tax Use Tax Regional Transit Authority Tax Food and Beverage Tax Litter Tax Lodging Tax State Public Utility Tax Tobacco Products Tax Petroleum and Hazardous Substances Tax Solid Fuel Burning Device Tax Syrup Tax Enhanced 911 Tax</p> <p>Series revised – Added list to description – 03/03</p>	OPR	Filing plus 5 years	Destroy when obsolete or superseded	GS50-12D-04	Reference RCW 82.32.070, and Department of Revenue Advisory No. 152.32.199.
21	<p>WEIGHING AND MEASURING DEVICE INSPECTIONS</p> <p>New series-07/03</p>	OPR	Completion of inspection plus 6 years	Destroy when obsolete or superseded	GS50-12D-19	
22	<p>WEIGHTS AND MEASURES ENFORCEMENT FILES</p> <p>New series-07/03</p>	OPR	Case closed or resolved plus 6 years	Destroy when obsolete or superseded	GS50-12D-21	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: MAIL SERVICES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

MAIL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	BULK MAILING PERMIT	OPR	6 years	Destroy when obsolete or superseded	GS50-06D-01	
2	CERTIFIED AND REGISTERED MAIL LOG	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-02	
3	CERTIFIED MAIL RETURN RECEIPT	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-03	
4	POSTAGE EXPENDITURE REPORT	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-04	
5	POSTAGE METER LICENSE	OPR	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-06D-05	
6	POSTAGE METER LOG	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-06	
7	PRIVATE GROUND DELIVERY REGISTER Series revised – Changed title from “UPS REGISTER” - 06/03	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-08	
8	SENDERS STATEMENT AND CERTIFICATION OF BULK MAILING	OFM	3 years	Post office has other copies	GS50-06D-07	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: MOTOR POOL, VEHICLE, AND EQUIPMENT MAINTENANCE

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

MOTOR POOL, VEHICLE, AND EQUIPMENT MAINTENANCE

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ACCIDENT/TRAFFIC COLLISION LOGS Series revised – Added “/TRAFFIC COLLISION” to title - 03/03	OFM	6 years after last entry	Destroy when obsolete or superseded	GS50-06E-13	
2	ACCIDENT/TRAFFIC COLLISION REPORTS Written report of traffic accidents/collisions filed with the law enforcement entity having jurisdiction over the location of the accident/collision. New series- 06/03	OPR	Washington State Patrol retains for 5 years	Agency– retain for 6 years	GS51-05F-01	
3	BILLING TO OTHER AGENCIES FOR USE OF VEHICLES AND EQUIPMENT	OPR	6 years	Destroy when obsolete or superseded	GS50-06E-01	
4	CERTIFICATES OF VEHICLE TITLE	OPR	Destroy after disposition of vehicle and completion of audit	Destroy when obsolete or superseded	GS50-06E-02	
5	EQUIPMENT AND VEHICLE CHECKOUT LOG	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-03	
6	EQUIPMENT AND VEHICLE DATA AND STATISTICAL REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-04	
7	EQUIPMENT AND VEHICLE LEASES	OPR	Termination of lease plus 6 years	Destroy when obsolete or superseded	GS50-06E-05	
8	EQUIPMENT AND VEHICLE MAINTENANCE AND HISTORY FILES Includes original defect and inspection report.	OFM	Until disposal or sale of equipment or vehicle	Destroy when obsolete or superseded	GS50-06E-06	
9	EQUIPMENT AND VEHICLE MAINTENANCE REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-20	
10	EQUIPMENT AND VEHICLE SAFETY ANALYSIS AND INVESTIGATION FILES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06E-14	
11	EQUIPMENT AND VEHICLE SALE AND SALVAGE RECORD	OPR	6 years	Destroy when obsolete or superseded	GS50-06E-08	
12	EQUIPMENT AND VEHICLE USE REQUEST	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-09	
13	EQUIPMENT/VEHICLE PARTS ORDERS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-21	
14	FUEL PUMP/TANK AUDIT REPORTS	OFM	2 years	Destroy when obsolete or superseded	GS50-06E-15	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

MOTOR POOL, VEHICLE, AND EQUIPMENT MAINTENANCE

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15	FUEL STORAGE FACILITY RECORDS Regulatory and operating records; receiving, dispersal, and inventory documentation including maintenance of facility.	OFM	3 years – Selected documents kept for life of facility	Destroy when obsolete or superseded	GS50-06E-16	
16	FUEL/OIL USAGE REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-10	
17	PARTS CONTROL FILES Record of vehicle/equipment parts in stock.	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-12	
18	PARTS INVENTORY	OFM	3 years after obsolete or superseded	Destroy when obsolete or superseded	GS50-06E-17	
19	PARTS MASTER LISTING REPORTS	OFM	3 years after obsolete or superseded	Destroy when obsolete or superseded	GS50-06E-18	
20	TIRE MAINTENANCE REPORTS	OFM	5 years	Destroy when obsolete or superseded	GS50-06E-19	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: NOXIOUS WEED CONTROL

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Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

NOXIOUS WEED CONTROL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	APPEAL OF ENFORCEMENT ACTION - NOXIOUS WEED CONTROL	OFM	County Clerk holds primary copy	3 years after case closed	GS58-05-01	Reference RCW 17.10.180.
2	APPEAL OF INFRACTION PENALTY - NOXIOUS WEED CONTROL	OFM	County Clerk holds primary copy	3 years after case closed	GS58-05-02	Reference RCW 17.10.330.
3	CONTROL ACTIONS - NOXIOUS WEED CONTROL Includes Numeric Log, Affidavit of Control, and Request for Hearing, Authorization for Representation, Notice of Hearing, Hearing Determination Conclusions, Certified and Return Receipt Slips, Liens, Lien Release-Partial, Lien Release-Unconditional, Landowner Payment Receipts, and back-up documentation.	OPR	6 years	Destroy when obsolete or superseded	GS58-05-03	Reference RCW 17.10.170.
4	FIELD INSPECTION RECORDS - NOXIOUS WEED CONTROL Includes Numeric Log, Public Complaints of Weeds, Field Inspection Notice, Entry Notification Forms, Infestation Location Maps, and Dominance Rating Form, Control Postcards returned, and back-up documentation.	OPR	6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS58-05-04	Reference RCW 17.10.160 and 17.10.170. Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	INFRACTION REPORTS - ASSESSMENT OF PENALTY - NOXIOUS WEED CONTROL	OFM	District Court has primary copy	3 years	GS58-05-05	Reference RCW 17.10.350.
6	INFRACTION REPORTS - DETERMINATION HEARING - NOXIOUS WEED CONTROL	OPR	6 years	Destroy when obsolete or superseded	GS58-05-06	Reference RCW 17.10.330.
7	INFRACTION REPORTS - NOTICE OF INFRACTION - NOXIOUS WEED CONTROL	OFM	District Court has primary copy	6 years	GS58-05-07	Reference RCW 17.10.310 and RCW 17.10.320.
8	LANDOWNER PAYMENT RECEIPTS - NOXIOUS WEED CONTROL	OFM	County Treasurer has primary copy	6 years	GS58-05-08	Reference RCW 17.10.170.
9	SEARCH WARRANTS - NOXIOUS WEED CONTROL Includes Numeric Log, Affidavit of Warrant to Enter, Warrant to Enter, Report of Agency and Inspection Result, Physical Evidence Collection Form, and Physical Evidence in Custody.	OPR	6 years	Destroy when obsolete or superseded	GS58-05-09	Reference RCW 17.10.160.

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ALL LOCAL GOVERNMENT AGENCIES**

NOXIOUS WEED CONTROL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
10	WEED CONTROL NOTIFICATION Includes Numeric Log, Field Inspection, Weed Control Notice, Affidavit of Mailing, Certified and Return Receipt Slips, Infestation Location Maps, Dominance Rating Forms, Entry Notification Forms, Public Complaints of Weeds, Control Postcards returned, and back-up documentation.	OPR	6 years	Destroy when obsolete or superseded	GS58-05-10	Reference RCW 17.10.170.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: PARKS AND RECREATION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

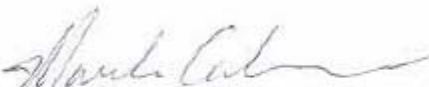
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PARKS AND RECREATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	CONSTRUCTION & PLANNING PROJECT FILES – PARKS AND RECREATION	OPR	Completion of project plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-13C-02	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	DESIGN STANDARDS REFERENCE FILE – PARKS AND RECREATION ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Keep until revised or superseded	Destroy when obsolete or superseded	GS50-13C-03	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside and outside the agency.
3	FACILITIES USE PERMITS – PARKS AND RECREATION	OFM	3 years	Destroy when obsolete or superseded	GS50-13C-04	
4	GIFTS AND DONATIONS INFORMATION FILES – PARKS AND RECREATION	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-13C-05	
5	HORTICULTURE ACTIVITY AND PROJECT FILE – PARKS AND RECREATION	OFM	Completion of project plus 5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-13C-06	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	PARK MAPS May include park boundaries, facilities, landscaping, topography, and other pertinent information. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-13C-07	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
7	PROGRAM SCHEDULES – PARKS AND RECREATION	OFM	Destroy when superseded plus completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-13C-09	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PARKS AND RECREATION

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
8	PROJECT PLANS, AND DRAWINGS – PARKS AND RECREATION ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-13C-10	Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
9	RECREATION CLASS ATTENDANCE RECORDS May include class rosters, original sign-up sheets, registration forms, worksheets, reports, emergency information, waiver of liability, etc. Used for attendance and refund purposes. New Series – 05/02	OPR	6 years after class completion	Destroy when obsolete or superseded	GS50-13C-19	SUPERSEDED
10	RECREATION PROGRAM FILES	OFM	Until obsolete or superseded -Potential archival value -See remarks	Destroy when obsolete or superseded	GS50-13C-13	
11	RECREATION SCHOLARSHIP APPLICATIONS – APPROVED	OPR	6 years	Destroy when obsolete or superseded	GS50-13C-17	
12	RECREATION SCHOLARSHIP APPLICATIONS – NOT APPROVED	OFM	Until completion of approval process plus 30 days	Destroy when obsolete or superseded	GS50-13C-18	
13	SPORTS LEAGUES PERMITS	OPR	Expiration plus 6 years	Destroy when obsolete or superseded	GS50-13C-16	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: PERSONNEL

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

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General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

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For the Attorney General: Mark Calkins



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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PERSONNEL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ADA (AMERICANS WITH DISABILITIES ACT)-REHABILITATION ACT OF 1973, SECTION 504 CLAIM AND ACCOMMODATION FILES	OPR	Completion of accommodation plus 6 years	Destroy when obsolete or superseded	GS50-04C-01	
2	AFFIRMATIVE ACTION FORECASTS	OFM	2 years	Destroy when obsolete or superseded	GS50-04C-02	
3	AFFIRMATIVE ACTION PLANS ESSENTIAL RECORD - Needs security backup - See remarks	OPR	Keep until superseded plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-04C-03	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
4	AFFIRMATIVE ACTION STUDIES AND REPORTS	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-32	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	APPLICATION FOR EMPLOYMENT WHEN APPLICANT IS NOT HIRED	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-01	
6	AUDIO/VIDEO TAPE RECORDINGS OF COMMISSION MEETINGS Magnetic sound or video recordings of commission proceedings, which may be used to prepare minutes.	OPR	6 years OR 1 year if transcribed, and transcription is approved by Commission – See remarks	Destroy when obsolete or superseded	GS50-05A-06	Due to the limited life span of magnetic recordings, this records series cannot serve as a permanent record of commission proceedings. Verbatim accounts of meetings are often required as evidence in court proceedings involving decisions, which result in ordinances, resolutions, or official policy.
7	BENEFITS STUDIES AND SURVEYS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04D-01	
8	CIVIL SERVICE COMMISSION JOURNAL Account of activity pertaining to certain civil service job openings. Contains names, test scores, and an indication of whether or not the persons involved are on an eligibility list, etc.	OFM	Expiration plus 1 year	Destroy when obsolete or superseded	GS50-04A-02	Contact your Regional Archivist - one copy of each available report should be assembled for transfer to Regional Archives.

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PERSONNEL

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
9	CIVIL SERVICE EXAMINATION (PASSED BUT NOT HIRED) Examinations of those applicants that are on eligibility list, but have not been hired.	OFM	2 years	Destroy when obsolete or superseded	GS50-04A-03	
10	COLLECTIVE BARGAINING AGREEMENTS ESSENTIAL RECORD - Needs security backup -- See remarks.	OPR	Termination plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-11	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
11	COLLECTIVE BARGAINING CONTRACT AND AGREEMENT NEGOTIATIONS FILES <i>Series revised – Removed “subject to any restrictions provided by collective bargaining contracts and agreements” from remarks column – 05/04</i>	OFM	Until approval of negotiated agreement - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-04E-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch subject to any restrictions provided by collective bargaining contracts and agreements.
12	CONTINUING PROFESSIONAL EDUCATION RECORDS Records document the continuing education requirement for employees. <i>New series – 05/04</i>	OFM	End of licensing or reporting period plus 4 years	Destroy when obsolete or superseded	GS50-05A-23	
13	CUMULATIVE LEAVE RECORD	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-02	
14	DRUG/ALCOHOL TEST RESULTS – NEGATIVE RESULTS OR CANCELED TESTS (AGENCY EMPLOYEES) <i>New series – 05/04</i>	OPR	Results posted or test canceled plus 1 year	Destroy when obsolete or superseded	GS50-04B-33	Reference 49CFR382.401.

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
15	<p>DRUG/ALCOHOL TEST RESULTS - POSITIVE RESULTS OR REFUSAL TO TEST (AGENCY EMPLOYEES) Files document drug/alcohol testing for cases with reasonable suspicion of abuse/use of substance. Includes drug/alcohol test results, corrective action, treatment, etc.</p> <p>Series revised – Added “Positive Results” and “or Refusal to Test” to title, added description, changed designation from OPR, reduced retention from 6 years, and added CFR citation to remarks – 05/04</p>	OFM	Date of results plus 5 years	Destroy when obsolete or superseded	GS50-04B-27	Reference 49CFR382.401.
16	<p>ELIGIBILITY LIST OR REGISTER List of individuals eligible to fill specific positions.</p>	OFM	2 years	Destroy when obsolete or superseded	GS50-04A-04	
17	<p>EMPLOYEE & VOLUNTEER FINGERPRINT LISTING Listings of newly hired employees fingerprinted for criminal background checks.</p>	OPR	6 years	Destroy when obsolete or superseded	GS50-04B-11	
18	<p>EMPLOYEE ASSISTANCE PROGRAM – SUPERVISOR'S REFERRAL DOCUMENTATION Documentation of referrals and completion of treatment by employees referred to the Employee Assistance Program by their supervisors to resolve work-related problems.</p> <p>Revised series - Corrected DAN – 07/02</p>	OPR	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-28	
19	<p>EMPLOYEE ASSISTANCE PROGRAM CASE FILES Confidential personal records of the diagnosis of disabling personal problems and recommended professional treatment or problem solving plan together with a history of implementation of the plan.</p> <p>New Series – 07/02</p>	OPR	8 years after last treatment or session	Destroy when obsolete or superseded	GS50-04A-06	Reference RCW 4.16.350 (3).

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
20	EMPLOYEE ASSISTANCE PROGRAM FILES Quarterly reports, contracts, RFPs.	OFM	4 years	Destroy when obsolete or superseded	GS50-04B-19	
21	EMPLOYEE BENEFIT CONTRACTS / POLICIES / PLANS Includes insurance, deferred compensation, health care, etc. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Until superseded or coverage lapses plus 6 years	Destroy when obsolete or superseded	GS50-04D-02	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
22	EMPLOYEE BENEFIT PARTICIPATION / ENROLLMENT AGREEMENTS AND WITHDRAWALS ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Termination or withdrawal plus 6 years	Destroy when obsolete or superseded	GS50-04D-03	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
23	EMPLOYEE CONTRACTS – FINAL Includes riders issued. Series revised – Added “Termination of employment plus” to primary copy retention – 06/03 Series Deleted – Covered by GS 50-01-11 – “Contracts, Agreements, and Warranties” – 08/04	OPR	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-12	
24	EMPLOYEE CONTRACTS – SUPERSEDED Contracts superseded within fiscal year.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-13	
25	EMPLOYEE CORRECTIVE ACTION AND PROBATION DOCUMENTS	OPR	6 years after completion of probation or disciplinary action, or destroy according to the provisions of collective bargaining contracts and agreements	Destroy when obsolete or superseded	GS50-04B-15	
26	EMPLOYEE DIRECTORY/ROSTER	OFM	Destroy when obsolete or superseded – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-04B-14	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
27	<p>EMPLOYEE HEALTH HISTORY FILES Documentation of physical examinations and tests, which verify that individual employees meet the physical condition requirements established in their terms of employment.</p> <p>Series Deleted – Combined with Employee Medical and Exposure Records – 05/04</p>	OPR	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-26	
28	<p>EMPLOYEE HISTORY May include all or some of the following: Details on employee application, start of employment, employment status, position description, job classification, evaluations, raises, criminal history and background checks, investigations, retirement or disability resulting in employment termination, and evaluation of applications of recognition of non-college credit courses.</p> <p>ESSENTIAL RECORD – Needs security backup – See remarks.</p> <p>Series revised – revised remarks and description – 02/02</p> <p>Series deleted – Combined with Personnel History Files – 06/03</p>	OFM	Termination plus 6 years – See remarks	Destroy when obsolete or superseded	GS50-04B-03	<p>Retention may be subject to restrictions provided by collective bargaining contracts and agreements.</p> <p>May be kept in Personnel File (if necessary).</p> <p>This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.</p>

SUPERSEDED

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PERSONNEL

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
29	<p>EMPLOYEE EXPOSURE AND MEDICAL RECORDS See WAC 296-62-05207 for full description.</p> <p>Series revised – Changed description from “A record concerning the health status of an employee which is made or maintained by a physician, nurse, or other health care personnel, or technician. Includes fit for duty medical examinations. Does not include: Health insurance claim records, first-aid records of one-time treatment (minor scratches, cuts, burns, etc.), records of employees who have worked for less than one year if they are provided to the employee upon termination of employment.” added CFR and WAC references to remarks, and absorbed Employee Health History Files (GS04B-26) – 05/04</p>	OPR	Termination of employment plus 30 years	Destroy when obsolete or superseded	GS50-04B-30	Reference 29CFR1910.1020, and WAC 296-62-05205 and 05207
30	<p>EMPLOYEE SUGGESTION PROGRAM FILES Original suggestion forms, evaluation forms, recommendation form, and correspondence to document and process employee suggestion files.</p>	OFM	3 years after determination of suggestion	Destroy when obsolete or superseded	GS50-04B-20	
31	<p>EMPLOYEE TRAINING HISTORY FILE Files documenting the training history of individual employees who have participated in training and staff development programs. May include in-service and class registrations, confirmations, and documentation of training completed.</p>	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-04G-01	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
32	EMPLOYMENT ELIGIBILITY DOCUMENTS – IMMIGRATION AND NATURALIZATION SERVICE (INS) FORM I-9 Documents used to verify employment eligibility within the United States. Series may include: Federal I-9 forms, passport copies, copies of valid driver's license, copies of certificate of naturalization, etc. New Series – 07/03	OPR	Date employee hired plus 3 years or termination of employment plus 1 year, whichever is longer – See remarks	Destroy when obsolete or superseded	GS50-05A-22	Reference 8CFR24a.2 (2) (A)
33	EMPLOYMENT INQUIRIES Applications filled out by persons requesting positions and test announcement information.	OFM	1 year	Destroy when obsolete or superseded	GS50-04A-05	
34	EMPLOYMENT INTERVIEW EVALUATION FILES Includes test results.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-16	
35	EMPLOYMENT REQUISITION / PERSONNEL ACTION REQUEST May contain position specifications, needs analysis, and authorization signatures.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-17	
36	EQUAL EMPLOYMENT OPPORTUNITY COMPLAINTS AND CONCILIATIONS	OPR	Resolution plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-04C-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch subject to Equal Employment Opportunity rules and regulations.
37	EQUAL EMPLOYMENT OPPORTUNITY REPORTS Series revised – Reduced primary copy retention from 5 years and added reference to remarks - 06/03	OFM	3 years	Destroy when obsolete or superseded	GS50-04C-05	Reference 29CFR1602.41.
38	GRIEVANCES AND APPEALS – PERSONNEL – EMPLOYEE RELATIONS	OPR	Resolution plus 6 years	Destroy when obsolete or superseded	GS50-04E-03	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
39	HEPATITIS B VIRUS (HBV) AND HUMAN IMMUNODEFICIENCY VIRUS (HIV) EXPOSURE REPORTS AND WAIVERS ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Termination of employment plus 30 years	Destroy when obsolete or superseded	GS50-04B-04	Reference 29 CFR 1910.1020. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
40	IDENTIFICATION BADGE RECORDS FOR CONTRACT AND TEMPORARY EMPLOYEES Photo ID badges and supporting paperwork to track badges issued to contract and temporary employees.	OFM	1 year	Destroy when obsolete or superseded	GS50-04B-21	
41	JOB ANNOUNCEMENTS OR POSTINGS	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-18	
42	JOB DESCRIPTIONS Current statement of qualifications, responsibilities, and duties of each individual position. Revised series - Changed description – 07/02	OPR	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-04B-05	
43	LISTING OF PARTICIPANTS COVERED BY AGENCY HEALTH INSURANCE PROVIDERS – EMPLOYEE BENEFITS Report submitted monthly to the agency by the provider.	OFM	3 years	Destroy when obsolete or superseded	GS50-04D-06	
44	MINUTES OF CIVIL SERVICE COMMISSION PROCEEDINGS, APPROVED AND SIGNED Official account of civil service commission meetings. Includes agendas and all referenced and attached documents. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-05A-13	The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
45	MONTHLY STATEMENT OF EMPLOYEE BENEFITS PAID	OPR	6 years	Destroy when obsolete or superseded	GS50-04D-04	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PERSONNEL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
46	PERFORMANCE EVALUATION BACKGROUND FILE – SUPERVISOR Series revised – Changed title from SUPERVISOR’S EMPLOYEE PERFORMANCE BACKGROUND FILE – 12/03	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04B-31	
47	PERFORMANCE EVALUATIONS Evaluation of employee work performance, prepared by supervisor on a regular schedule. New Series – 12/03	OFM	Completion of Evaluation plus 3 years	Destroy when obsolete or superseded	GS50-04A-08	
48	PERSONNEL FILE May include but is not limited to: Application for employment when hired; start of employment, identification, oaths of officials elected and appointed; bonds of officials elected and appointed; criminal history, background checks and investigations; records of employment status, position description and job classification; citations; letters of recommendation; personal history cards, raises; retirement or disability resulting in employment termination; evaluation of applications of recognition or non-college credit courses. ESSENTIAL RECORD – Needs security backup – See remarks. Series revised – Combined with Employee History Files and changed wording in description – 06/03 Series revised: Removed evaluation reports of job performance to create a new series – 12/03	OFM	Termination plus 6 years- See remarks	Destroy when obsolete or superseded	GS50-04B-06	Retention may be subject to restrictions provided by collective bargaining contracts and agreements. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
49	POSITION CLASSIFICATION STUDIES Details on specific role and position of each job title, duties, obligations, etc.	OFM	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-04B-07	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PERSONNEL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
50	POSITION DESCRIPTION HISTORY FILES A history of positions, classifications, and corresponding job descriptions as these positions are revised. (Serves as writing aid for the development of future positions.) Revised series - Added description – 07/02	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-04B-08	
51	RECRUITMENT FILES Documents recruitment and selection process for each advertised position, including newspaper announcement, job description, working papers/notes, applicant list, interview questions and notes, selection documents, and employee applications.	OFM	2 years	Destroy when obsolete or superseded	GS50-04B-22	
52	REQUESTS FOR LEAVE/OVERTIME	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-09	
53	SALARY SCHEDULE - EMPLOYEE New Series – 07/02	OFM	Destroy when superseded plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-04A-07	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
54	TEMPORARY AGENCY WORKER ACCOUNTS Tracks temporary agency workers hired using original request forms moved to individual departments.	OFM	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-23	
55	TRAINING AVAILABILITY ANNOUNCEMENTS / NOTICES	ORM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04G-03	
56	TRAINING/CLASS COMPLETION REPORT Listings of employees and the classes or training exercises that have been completed. Produced on a periodic basis.	OFM	3 years	Destroy when obsolete or superseded	GS50-04G-02	
57	TRANSCRIPTIONS OF AUDIO/VIDEO TAPES OF CIVIL SERVICE COMMISSION OFFICIAL PROCEEDINGS	OPR	6 years after minutes approved by commission	Destroy when obsolete or superseded	GS50-05A-21	Contact your Regional Archivist - one copy of each available report should be assembled for transfer to Regional Archives.
58	UNEMPLOYMENT INSURANCE CLAIMS OF INDIVIDUAL EMPLOYEES	OPR	6 years	Destroy when obsolete or superseded	GS50-04D-05	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PERSONNEL

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
59	UNION ARBITRATION FILES Case histories of disputes between agency and union settled through arbitration.	OPR	6 years	Destroy when obsolete or superseded	GS50-04E-06	
60	UNION ORGANIZATION LISTS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04E-05	
61	VOLUNTEER APPLICATIONS Series deleted – Is part of “VOLUNTEER FILES” – 06/03	OPR	Termination of volunteer employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-24	
62	VOLUNTEER APPLICATIONS – NOT ACCEPTED OR INELIGIBLE New Series – 06/03	OFM	Application denied plus 1 year	Destroy when obsolete or superseded	GS50-04B-24	
63	VOLUNTEER FILES Documents work service of individual volunteer. Includes application. ESSENTIAL RECORD - Needs security backup - See remarks. Series revised – Changed “history” to “service” in description, added “Includes application” to description, and changed “employment” to “service” in primary copy retention – 06/03	OPR	Termination of volunteer service plus 6 years	Destroy when obsolete or superseded	GS50-04B-10	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
64	WHISTLEBLOWER INVESTIGATION REPORTS Agency copies of investigations of allegations of fraud or violations of state laws or regulations.	OPR	Case closed plus 6 years	Destroy when obsolete or superseded	GS50-04B-25	
65	WORK ASSIGNMENT RECORD, SCHEDULE OR LOG Documentation of day-to-day tasks or projects assigned to and/or completed by individual staff or crews.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-29	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: PORT DISTRICTS

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PORT DISTRICTS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	AIRLINE STATISTICS	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-04-01	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	AIRPORT CERTIFICATION FILES ESSENTIAL RECORD – Needs security microfilm backup – See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-04-02	The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
3	CARGO HANDLING AND STORAGE DOCUMENTATION Inventories, delivery and receiving records, orders, tonnage reports, stock transfers, warehouse receipts.	OPR	6 years	Destroy when obsolete or superseded	GS55-04-03	
4	CIVIL AERONAUTICS BOARD DOCKETS AND RELATED FILES	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-04-04	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	COLD STORAGE TIME AND TEMPERATURE RECORDS	OPR	6 years	Destroy when obsolete or superseded	GS55-04-05	
6	CUSTOMER BILLINGS – PORT DISTRICTS	OPR	6 years	Destroy when obsolete or superseded	GS55-04-06	
7	CUSTOMER FILES – PORT DISTRICTS Includes applications and contracts.	OPR	6 years after termination of agreement - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-04-07	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
8	F.A.A. REGULATORY FILES	OFM	5 years	Destroy when obsolete or superseded	GS55-04-08	
9	FOREIGN TRADE ZONE APPLICATION	OFM	Department of Commerce keeps PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-04-09	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PORT DISTRICTS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
10	INTERNATIONAL CUSTOMS REPORTS	OFM	5 years	Destroy when obsolete or superseded	GS55-04-10	
11	LANDING FEE REPORTS	OPR	6 years	Destroy when obsolete or superseded	GS55-04-11	
12	LONGSHORE WORK REPORTS AND PAYROLL	OFM	Pacific Maritime Association retains primary copy	Destroy when obsolete or superseded	GS55-04-12	
13	PASSENGER FACILITIES CHARGES – PORT DISTRICTS	OPR	6 years	Destroy when obsolete or superseded	GS55-04-13	
14	TARIFF MEMORANDUM Documentation of tariffs and history of tariff changes.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS55-04-14	
16	TRANSIENT AIRCRAFT FILES Billing, landing fees, gate usage, and ticket counter fees.	OPR	6 years	Destroy when obsolete or superseded	GS55-04-15	
17	VESSEL FILES Cargo manifests, bills of lading discharge list, dockage report.	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-04-16	Please contact your Regional Archivist before destroying the original records of passenger manifests and dockage reports. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
18	VESSEL LOGS Record of each visit by vessel.	OPR	Retain 6 years after last entry in log - Potential archival value - See remarks		GS55-04-17	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: PROSECUTING ATTORNEY

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

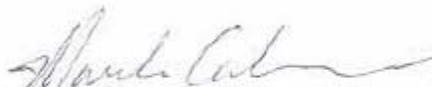
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) - are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value - The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record - This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE - UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PROSECUTING ATTORNEY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ANNUAL REPORT TO STATE LIQUOR CONTROL BOARD	OFM	Liquor Control Board – PERMANENT	Prosecutor – 2 years	GS52-07-01	
2	CIVIL LITIGATION FILES Working copies or court documents and police records, plus notes, correspondence, and other items related to processing civil cases as a defendant or plaintiff.	OFM	Official court of record – PERMANENT	Prosecutor – 10 years after case closed - Potential archival value – See remarks	GS53-02-04	Limitation of Action RCW 4.16.020(2). Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred and preserved at the Regional Archives.
3	CIVIL TOPICAL AND WORKING FILES Reference and working files compiled on various agencies, issues, and subjects by the Prosecutor and/or deputies in the process of acting as legal counsel for county government agencies, elected officials, commissions, and related bodies.	OFM	Destroy when obsolete or superseded. Potential archival value – see remarks	Destroy when obsolete or superseded	GS52-07-03	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred and preserved at the Regional Archives.
4	CRIMINAL CASE FILES - ADULTS - PROSECUTING ATTORNEY Contains working copies of items in official court of record and police files, plus notes, correspondence, and other documents related to prosecution of felonies and misdemeanor cases					
	A. CLASS "A" FELONIES / MAJOR CASES-CONVICTIONS Adult murder, manslaughter, vehicular homicide, kidnapping, assault 1, and sex offender cases.	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 20 years after sentencing*	GS52-07-04A	*NOTE: Sex offender and other "special cases" may be designated by the prosecutor for longer retention. Please reference RCW40.14.070.2.
	B. CLASS "B" FELONY CONVICTIONS Series revised – Added "CONVICTIONS" to title and changed secondary record copy retention from "case dismissed or acquittal." – 09/02	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 10 years after sentencing*	GS52-07-04B	
	C. CLASS "C" FELONIES AND DUI CONVICTIONS Series revised – Added "CONVICTIONS" to title – 09/02	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 5 years after sentencing	GS52-07-04C	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PROSECUTING ATTORNEY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
	D. CASES DISMISSED AND ACQUITTALS Series revised – Changed secondary record copy retention from “sentencing.”	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 3 years after case dismissed or acquittal	GS52-07-04D	
	E. CASES DECLINED	OFM	Law enforcement agency – varies	Prosecutor – 3 years	GS52-07-04E	
	F. MISDEMEANORS AND GROSS MISDEMEANORS New Series – 07/02	OFM	Official court of record retains primary copy (Police reports held by law enforcement agency)	Prosecutor - 3 years after sentencing	GS52-07-04F	
5	CRIMINAL CASE FILES - JUVENILES Contains working copies of items in official court of record and police files, plus notes, correspondence, and other documents related to prosecution of felonies and misdemeanor cases.					
	A. CLASS “A” FELONIES / MAJOR CASES-CONVICTIONS Murder, manslaughter, vehicular homicide, kidnapping, assault 1, and sex offender cases.	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 20 years after sentencing*	GS52-07-05A	*NOTE: Sex offender and other “special cases” may be designated by the prosecutor for longer retention. Please reference RCW40.14.070.2
	B. CLASS “B” FELONY CONVICTIONS Series revised – Added “CONVICTIONS” to title and changed secondary record copy retention from “case dismissed or acquittal.” – 09/02	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 10 years after sentencing*	GS52-07-05B	
	C. CLASS “C” FELONY AND DUI CONVICTIONS Series revised – Added “CONVICTIONS” to title – 09/02	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 5 years after sentencing	GS52-07-05C	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PROSECUTING ATTORNEY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
	D. CASES DISMISSED AND ACQUITTALS Series revised – Changed secondary record copy retention from “sentencing.” – 09/02	OFM	Official court of record – PERMANENT. (Police reports held by law enforcement agency)	Prosecutor – 3 years after case dismissed or acquittal	GS52-07-05D	
	E. CASES DECLINED	OFM	Law enforcement agency – varies	Prosecutor – 3 years	GS52-07-05E	
	F. MISDEMEANORS AND GROSS MISDEMEANORS New Series – 06/02	OFM	Official court of record retains primary copy (Police reports held by law enforcement agency)	Prosecutor - 3 years after sentencing	GS52-07-05F	
6	DAMAGE AND LOSS CLAIMS – PROSECUTING ATTORNEY	OFM	County fiscal agent – until completion of State Auditor’s examination, plus 6 years if there is a monetary settlement	Prosecutor - destroy when obsolete or superseded	GS50-08A-03	
7	DISTRICT COURT CASE FILES					
	A. CRIMINAL CASES FOR WHICH PERMANENT ORDERS HAVE BEEN GRANTED Physical control deferred prosecution, assault, anti-harassment, domestic violence	OFM	District court/DISCIS – PERMANENT	Prosecutor – 3 years after case sentencing, dismissed, or declined	GS52-07-07A	
	B. DUI	OFM	District court/DISCIS – PERMANENT	Prosecutor – 5 years	GS52-07-07B	
	C. CRIMINAL CASES FOR WHICH PERMANENT ORDERS HAVE NOT BEEN GRANTED Physical control deferred prosecution, assault, anti-harassment, domestic violence	OFM	District court/DISCIS – PERMANENT	Prosecutor – 30 days after case sentencing, dismissed, or declined	GS52-07-07C	
	D. INFRACTIONS AND MISDEMEANORS	OFM	District court/DISCIS – 3 years after final disposition	Prosecutor – 30 days after case sentencing, dismissed, or declined	GS52-07-07D	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PROSECUTING ATTORNEY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
	E. CIVIL CASE FILES	OFM	District court/DISCIS – 10 years after date of Unsatisfied Judgment; 3 years for case dismissed or judgment satisfied	Prosecutor – 30 days after case sentencing, dismissed, or declined	GS52-07-07E	
8	EXTRADITIONS	OFM	1 year	Destroy when obsolete or superseded	GS52-07-08	Cases for fugitives from other jurisdictions become regular case files; apply retention based on type.
9	FAMILY LAW FILES					
	A. PATERNITY CASE FILES	OFM	Superior Court Clerk – PERMANENT	Prosecutor – Until child is age 19	GS52-07-09A	
	B. IV-D PROGRAM FILES	OFM	State D.S.H.S.	Prosecutor – 6 years	GS52-07-09B	
	C. SUPPORT ENFORCEMENT FILES	OFM	Superior Court Clerk – PERMANENT	Prosecutor – 3 years after entry of last order, or until youngest child is 18	GS52-07-09C	
	D. SUPPORT MODIFICATION, CONTEMPT, AND DISSOLUTION RESPONSE FILES	OFM	Superior Court Clerk – PERMANENT	Prosecutor – 3 years after entry of last order, or until youngest child is 18	GS52-07-09D	
	E. DEPENDENCY CASE FILES	OFM	Superior Court Clerk – PERMANENT	Prosecutor – 6 years	GS52-07-09E	
10	INVOLUNTARY COMMITMENT ORDERS (A.K.A. 72 HOUR HOLDS) Orders to hold a person for possible substance abuse or mental health problems. If charges are filed, the order becomes part of the case file. New Series – 09/02	OFM	3 years after release from hold	Destroy when obsolete or superseded	GS52-06C-09	
11	INVOLUNTARY COMMITMENT CASE FILES Includes commitment orders, psychiatrist reports, etc.	OFM	Superior Court Clerk – PERMANENT	Prosecutor – 3 years after case closed	GS52-07-10	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PROSECUTING ATTORNEY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
12	LEGAL OPINIONS – PROSECUTING ATTORNEY Official interpretations made by agency attorney regarding questions of legal rights or liabilities affecting the agency or any of its departments and offices.	OPR	PERMANENT – Potential archival value – see remarks	Destroy when obsolete or superseded	GS53-02-03	Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred and preserved at the Regional Archives.
13	PRE-PROSECUTION DIVERSION BILLING AND SUPPORT FILES	OFM	6 years	Destroy when obsolete or superseded	GS52-07-13	
14	PRE-PROSECUTION DIVERSION CASE FILES	OFM	State Office of the Administrator for the Courts	Prosecutor – 1 year after completion of diversion contract	GS52-07-12	
15	VICTIM / WITNESS CASE FILES Includes interview notes and case-related documents used for client reference and statistical reports.	OFM	6 years	Destroy when obsolete or superseded	GS52-07-14	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: PUBLIC INFORMATION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PUBLIC INFORMATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	BIOGRAPHICAL FILES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-01	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	HISTORICAL FILES OF THE AGENCY	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-02	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3	INFORMATIONAL REPORTS COMPILED FOR AGENCY USE	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-03	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
4	MASTER FILE OF AGENCY PUBLICATIONS	OFM	Destroy when obsolete or superseded - Potential archival value - See remark	Destroy when obsolete or superseded	GS50-06F-04	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	NEWSPAPER CLIPPINGS	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-05	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	PHOTOGRAPHS, AUDIO/VISUAL MATERIAL Photographic negatives and prints may be held at Regional Archives for permanent preservation and security backup - See remarks.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-06	Please contact your Regional Archivist before disposing of this record or to discuss transfer for permanent preservation and security backup.
7	PRESS RELEASES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-07	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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PUBLIC INFORMATION

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8	SCRAPBOOKS AND ALBUMS	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-08	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
9	SPEECHES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-09	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: PUBLIC WORKS - ENGINEERING

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APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED DECEMBER 2004



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PUBLIC WORKS - ENGINEERING

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ABANDONED, VOIDED, OR DEFECTIVE DRAWINGS PUBLIC WORKS-ENGINEERING	OFM	Destroy	Destroy	GS50-18-01	
2	AERIAL SURVEY PHOTOGRAPH PRINTS, NEGATIVES, AND FLIGHT MAP - PUBLIC WORKS-ENGINEERING Recording physical features of areas within agency's jurisdiction at specific points of time. ESSENTIAL RECORD - Negatives may be held at regional archives for permanent preservation and security backup.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-02	Contact your Regional Archivist before disposing of this record or to discuss transfer of negatives for permanent preservation and security backup. This record should be protected from damage or loss by offsite storage of a security copy, or by keeping a list that identifies the locations of other copies inside and outside the agency.
3	ANNUAL BRIDGE REPORTS Annual report by bridge engineer on the condition of bridges within the agency's jurisdiction and the status of the agency's bridge maintenance program.	OPR	10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-03	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
4	ANNUAL CONSTRUCTION PROGRAM (ACP) Identifies the planned transportation construction projects for each year as approved by agency council, commission, or board.	OPR	Clerk of governing council, commission, or board - PERMANENT - 1 copy archival - See remarks	Destroy when obsolete or superseded	GS50-18-04	Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	ANNUAL CONSTRUCTION PROGRAM (ACP) AND TRANSPORTATION IMPROVEMENT PROGRAM (TIP) DEVELOPMENT FILES Background documentation and data used in developing each year's ACP and TIP.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-18-05	

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PUBLIC WORKS - ENGINEERING

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
6	<p>AS-BUILT CONSTRUCTION PROJECT PLANS Documentation of the actual physical product of each construction project. Documents both the as-approved design and changes made during construction.</p> <p>ESSENTIAL RECORD- Needs security microfilm backup - See remarks.</p>	OPR	Life or sale of facility plus 3 years– Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-06	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
7	<p>AS-DESIGNED DRAWINGS Documents used to guide the construction of roads, bridges, buildings, and other public facilities. May include drawings for temporary activities (i.e., project traffic, erosion control, etc). May be posted with changes during construction and become as-builts (see # 6).</p>	OFM	Completion of project plus 6 years- See remarks	Destroy when obsolete or superseded	GS50-18-07	If as-built is not produced, then the as-designed becomes primary copy and needs to be kept for life of structure plus 3 years
8	<p>BRIDGE INSPECTION FILES Documentation of periodic inspections, including bridge condition, testing, and load rating data.</p> <p>ESSENTIAL RECORD- Needs security microfilm backup - See remarks</p>	OPR	Life of structure plus 10 years	Destroy when obsolete or superseded	GS50-18-08	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
9	<p>BRIDGE MAINTENANCE HISTORY FILES Documentation of routine maintenance performed on bridges over time.</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OFM	Life of bridge	Destroy when obsolete or superseded	GS50-18-37	Reference RCW 36.80.040. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
10	<p>CITIZEN SERVICE REQUESTS / COMPLAINTS - PUBLIC WORKS-ENGINEERING Documentation of citizen's request to agency regarding maintenance and repair issues such as potholes, ditch cleaning, brush cutting, etc.</p>	OFM	3 years	Destroy when obsolete or superseded	GS50-18-09	

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PUBLIC WORKS - ENGINEERING

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
11	CONSTRUCTION PROJECT FILES Case file documentation on the progress and completion of each agency public works or engineering construction project. May include signed time cards. <i>Series revised – Added last sentence to description – 04/04</i>	OPR	Completion of project plus 6 years	Destroy when obsolete or superseded	GS50-18-10	
12	CONSTRUCTION PROJECTS: PRELIMINARY PLANS AND WORKSHEETS Drawings, specifications, and other documentation used for review and comment prior to preparation of design plans for proposed construction of roads, bridges, buildings, and public facilities.	OFM	Completion of project	Destroy when obsolete or superseded	GS50-18-11	
13	CREW CHIEF/FOREMAN'S PRODUCTION REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-18-12	
14	DAILY MAINTENANCE ACTIVITY RECORD/CREW SHEETS - PUBLIC WORKS-ENGINEERING Documentation of activities and locations of work performed.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-29	
15	EMERGENCY RESPONSE LOGS - PUBLIC WORKS-ENGINEERING	OPR	6 years	Destroy when obsolete or superseded	GS50-18-14	
16	FRANCHISE HISTORY FILES Core documentation of awards of franchises. ESSENTIAL RECORD – Needs security microfilm backup – See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-36	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

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PUBLIC WORKS - ENGINEERING

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
17	FRANCHISE WORKING FILES Agreements allowing activities within specified jurisdictions. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS55-05A-05	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
18	GEOLOGICAL DATA Reports relating to slides, borings, drainage, subsurface ground conditions, and other geodetic data.	OPR	Destroy when obsolete or superseded plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-15	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
19	LAND SURVEY FIELD BOOKS Field notes documenting locations and physical features within agency's jurisdiction. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-16	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
20	LOCAL IMPROVEMENT DISTRICT FILES Including petition, funding, and expenditure approval documentation.	OPR	Clerk of governing council, commission, or board - PERMANENT	Destroy when obsolete or superseded - Potential archival value - See remarks	GS50-18-17	Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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PUBLIC WORKS - ENGINEERING

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
21	PESTICIDE SPRAY APPLICATION DOCUMENTATION Includes location and crop or site where applied, date and time application of pesticide was applied, product name and environmental protection agency registration number, amount and concentration of pesticide applied, number of acres or other appropriate measure to which pesticide applied, licensed applicator's information, direction/estimated velocity of wind at time of application, etc. New Series – 07/02	OPR	7 years	Destroy when obsolete or superseded	GS50-18-43	Reference RCW 17.21.100 (3)
22	PIT AND QUARRY MATERIAL CONTROL FILES Documentation of quantities of material mined, crushed, stockpiled, loaded, etc.	OFM	3 years	Destroy when obsolete or superseded	GS50-18-19	
23	PLAT REVIEW WORKING FILES Documentation of review of recorded land subdivisions.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-18-20	
24	REFERENCE MAPS AND DRAWINGS	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-38	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

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PUBLIC WORKS - ENGINEERING

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25	<p>RELOCATION ASSISTANCE AND REAL PROPERTY ACQUISITION FILES FOR FEDERAL AND FEDERALLY ASSISTED PROGRAMS</p> <p>Documentation required to be maintained on the acquisition of individual parcels of real property and the relocation of the property owners for federally funded and federally assisted transportation projects.</p> <p>New Series 06/03</p>	OPR	3 years – See remarks	Destroy when obsolete or superseded	GS50-18-44	Reference CRF49.24.9, and WAC 468-100-009.
26	<p>RELOCATION ASSISTANCE AND REAL PROPERTY ACQUISITION REPORTS</p> <p>Reports to be submitted to the US Department of Transportation regarding real property acquisition and relocation activities for federally funded and federally assisted transportation projects.</p> <p>New Series 06/03</p>	OPR	6 years – Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-45	Reference CRF49.24.9, and WAC 468-100-009. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
27	<p>RIGHT-OF-WAY CASE FILES</p> <p>Documentation of land acquisitions through purchase, condemnation, etc., and disposal through sale, vacation, and related right of way issues.</p> <p>ESSENTIAL RECORD - Needs security microfilm backup - See remarks.</p>	OFM	Life of right of way - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-21	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

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PUBLIC WORKS - ENGINEERING

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
28	RIGHT-OF-WAY VACATION FILES Documentation of process of relinquishing road, street, alley, and other rights of way owned by the agency. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OFM	Approval by governing council, commission, or board plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-05A-08	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
29	ROAD AND BRIDGE CLOSURE NOTICES Public notice of road and bridge closure due to construction or hazardous conditions.	OFM	Reopening plus 6 years	Destroy when obsolete or superseded	GS50-18-23	
30	ROAD ESTABLISHMENT CASE FILES Document process of statutory road establishment. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Life of road plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-25	Reference RCW 36.80.040. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from loss or damage by storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
31	ROAD IMPROVEMENT DISTRICT (RID) CASE FILES Document the process of establishing a road improvement district.	OFM	Close out of funding plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-26	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
32	ROAD MAINTENANCE HISTORY FILES Documentation of routine maintenance performed over time on roads, ditches, etc. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	10 years	Destroy when obsolete or superseded	GS50-18-24	Reference RCW 36.80.040. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.

**GENERAL RECORDS RETENTION SCHEDULE FOR
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PUBLIC WORKS - ENGINEERING

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33	ROAD MAINTENANCE PROJECT FILES Documentation of non-routine maintenance projects such as enclosing ditches, installing walkways, drainage projects, road re-channelization, etc.	OPR	Completion of project plus 6 years	Destroy when obsolete or superseded	GS50-18-27	
34	STORM/DISASTER RESPONSE ACTION FILES Documentation of agency's activities and locations of work performed on storms, floods, and other emergencies.	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-29	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
35	STREET LIGHT HISTORY RECORDS	OFM	Life of equipment	Destroy when obsolete or superseded	GS50-18-30	
36	SURVEY MAPS FILED FOR RECORD Includes section and quarter section maps. ESSENTIAL RECORD - needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-31	Contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
37	TRAFFIC ACCIDENT REPORTS - PUBLIC WORKS-ENGINEERING Agency reference copies of reports on accidents occurring on roads and streets within the agency's jurisdiction.	OFM	Washington State Patrol keeps 6 years	Destroy when obsolete or superseded	GS50-18-32	
38	TRAFFIC COUNT DATA Data on traffic volume for individual roads and streets.	OFM	6 years	Destroy when obsolete or superseded	GS50-18-33	
39	TRAFFIC COUNT REPORTS Compilations of traffic count data on summary reports, printouts, and/or maps showing traffic volume on individual roads and streets.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-18-34	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

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40	TRAFFIC SIGN INVENTORY Documents location, installation, and repair of individual traffic control signs.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-18-35	
41	TRAFFIC SIGNAL HISTORY RECORD	OFM	Life of equipment plus 3 years	Destroy when obsolete or superseded	GS50-18-39	
42	TRAFFIC SIGNAL OPERATIONS REPORTS AND LOGS	OFM	3 years	Destroy when obsolete or superseded	GS50-18-40	
43	TRAFFIC SIGNAL TESTING AND INSTALLATION RECORDS	OFM	3 years	Destroy when obsolete or superseded	GS50-18-41	
44	TRANSPORTATION IMPROVEMENT PROGRAMS Identifies planned transportation construction projects for the ensuing six years as adopted by agency council, commission, or board.	OPR	Clerk of governing council, commission, or board - PERMANENT - 1 copy archival - See remarks	Destroy when obsolete or superseded	GS50-18-28	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
45	UNDERGROUND UTILITIES LOCATION REPORTS Information regarding the location of underground utility pipes and lines provided upon request to parties excavating on specific sites.	OFM	3 years	Destroy when obsolete or superseded	GS50-18-42	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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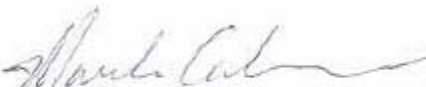
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED DECEMBER 2004



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PURCHASING

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	BID AND PROPOSAL FILES (SUCCESSFUL BIDS AND PROPOSALS ONLY) Case histories of requests for bids and proposals to provide the agency with goods and services, including specifications, the chosen bid or proposal, and statements of qualification.	OPR	6 years after completion of purchase or fulfillment of contract	Destroy when obsolete or superseded	GS50-08A-01	
2	CONSULTANT AND CONTRACTOR ROSTERS	OFM	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS50-08A-02	
3	CREDIT/DEBIT PURCHASE CHARGE RECEIPTS – PURCHASER’S COPY REVISED – CHANGED TITLE FROM “DEBIT/CREDIT CHARGES.” – 07/03	OFM	3 years	Destroy when obsolete or superseded	GS50-08A-04	
4	DAMAGE AND LOSS CLAIMS – PURCHASING	OFM	Keep until completion of State Auditor’s examination, plus 6 years if there is a monetary settlement	Destroy when obsolete or superseded	GS50-08A-03	
5	DELIVERY RECEIPT-INTERNAL – PURCHASING	OFM	3 years	Destroy when obsolete or superseded	GS50-08A-05	
6	EMERGENCY PURCHASE AUTHORIZATION AND EXCEPTION REQUEST Request for an exception of the purchasing process when a department exceeds the dollar limit when purchasing an item. Files document the approval authorization for emergency purchases under an amount set by the agency. Includes correspondence, copy of invoice, log of requests, etc. New Series-07/03	OFM	Date approved plus 3 years	Destroy when obsolete or superseded	GS50-08A-14	
7	EQUIPMENT/VEHICLE PARTS ORDERS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-21	
8	INVENTORY OF MATERIALS/EQUIPMENT, CHANGES AND TRANSFERS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-02	
9	INVENTORY/YEAR-END REPORT	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-03	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PURCHASING

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
10	MATERIALS DISBURSEMENT TICKETS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-04	
11	MATERIALS ORDERS/REQUISITIONS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-05	
12	MATERIALS RECEIPTS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-06	
13	MATERIALS RECEIVING AND DISBURSEMENT REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-07	
14	PACKING SLIPS	OFM	Until confirmation of materials received	Destroy when obsolete or superseded	GS50-08B-08	
15	PRICE CHECKS AND INFORMAL QUOTATIONS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-08A-06	
16	PURCHASE ORDER, REQUISITION AND BID LOGS LISTING Listing of purchase order, requisitions and/or bids in numerical order, including date, item, amount, department, and vendor.	OFM	3 years	Destroy when obsolete or superseded	GS50-08A-07	
17	PURCHASE/FIELD ORDERS Official statement documenting the purchase of commodities, goods or services on contract or not subject to bid.	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-08	
18	RECEIVING REPORTS Listing of items actually delivered to purchaser used to make sure that the shipment is correct and complete.	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-09	
19	REQUISITIONS Official statement documenting the purchase of commodities, goods, or services subject to bid.	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-10	
20	STORES REPORTS AND BACKUP DOCUMENTATION Reports document all transactions, used to determine cost allocation. New Series -- -07/03	OFM	End of calendar year plus 3 years	Destroy when obsolete or superseded	GS50-08A-15	
21	UNSUCCESSFUL BIDS AND PROPOSALS Includes statement of qualification. Series revised -- Increased primary copy retention from 2 years -- 07/03	OFM	3 years	Destroy when obsolete or superseded	GS50-08A-11	

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

PURCHASING

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
22	WITHDRAWAL/CANCELLATION/CHANGE OF PURCHASE ORDERS	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-12	
23	WOMEN AND MINORITY OWNED BUSINESS ENTERPRISE (WMBE) VENDOR COMPLIANCE REPORTS	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-13	Note: Initiative Measure 200 went into affect 12/98. Disposition of this series may begin in 2005.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: RECORDS MANAGEMENT

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED DECEMBER 2004



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	FILES CLASSIFICATION GUIDELINES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-09-12	
2	GENERAL RECORDS RETENTION SCHEDULE Records retention schedules issued by the Local Records Committee that provide all agencies with continuing authorization for disposition of commonly held records.	OFM	Local Records Committee - PERMANENT	Destroy when obsolete or superseded	GS50-09-01	
3	PUBLIC DISCLOSURE REQUEST FILES Formal request submitted by individuals for access to agency records.	OPR	Current year plus 1 year- See remarks	Destroy when obsolete or superseded	GS50-09-04	Records Committee reduced the retention from 6 years per RCW 40.14.060 (b) on 8/30/01.
4	PUBLIC DISCLOSURE REQUEST LOGS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-09-13	
5	PUBLIC RECORDS DESTRUCTION AFFIDAVITS Listings of records series destroyed at specific times, including inclusive dates or inclusive numbers, signed by agency representative witnessing destruction.	OPR	6 years	Destroy when obsolete or superseded	GS50-09-05	
6	PUBLIC RECORDS DESTRUCTION LOG ESSENTIAL RECORD – Needs security backup – See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-09-06	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
7	PUBLIC RECORDS RETENTION SCHEDULE AND DESTRUCTION AUTHORIZATION Continuing authorities for the disposition of public records approved specifically for the agency by the Local Records Committee.	OPR	Local Records Committee - PERMANENT	Destroy when obsolete or superseded	GS50-09-07	The Local Records Committee recommends a retention period of 6 years after disposition of the last records series listed on the schedule.
8	RECORDS CENTER TRANSMITTALS, INVENTORIES, AND INDEXES ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-09-08	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
9	RECORDS DESTRUCTION AUTHORIZATION (OFFICE OF RECORD) Document signed by the office of record allowing the destruction of specific records	OPR	6 years	Destroy when obsolete or superseded	GS50-09-10	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
10	RECORDS RETENTION SCHEDULES - INTERNAL Internal working guides abstracted from approved records retention schedules or approved general records retention schedules.	OFM	Destroy when superseded or revised	Destroy when obsolete or superseded	GS50-09-02	
11	RECORDS RETRIEVAL REQUEST AND CIRCULATION DOCUMENTATION Documentation of materials pulled from and/or returned to records storage center.	OFM	Keep until materials returned to records center	Destroy when obsolete or superseded	GS50-09-11	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: SEWER AND WATER SYSTEM DOCUMENTATION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

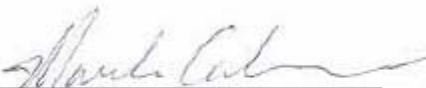
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Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SEWER AND WATER SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	BACKFLOW INCIDENT RECORDS Documentation of incidents of backflow contamination in water systems. Series revised – Changed title, added description, revised retention from Settlement plus 6 years, and added Reference to Remarks Column – 01/05	OPR	5 years – See remarks	Destroy when obsolete or superseded	GS55-06A-03	Reference WAC 246-290-490 (8)(a)(iii)
2	BACKFLOW PREVENTER INSPECTION AND INVENTORY Documentation required to be maintained on individual approved backflow preventers installed at water system service connections. Series revised – Changed title, added description, revised retention from 3 years, and added Reference to Remarks Column – 01/05	OFM	5 years or life of backflow preventer, whichever is shorter – See remarks	Destroy when obsolete or superseded	GS55-06A-01	Reference WAC 246-290-490 (8)(a)(ii)
3	BACKFLOW PREVENTER MASTER LIST Master list of connections and premises for which backflow preventers are required, including names and addresses of owners. Series revised – Changed title and description, revised retention from Destroy when obsolete or superseded, and added Reference to Remarks Column – 01/05	OPR	Retain documentation of individual backflow preventers until connection no longer pose a contamination threat to the water distribution system. See remarks	Destroy when obsolete or superseded	GS55-06A-02	Reference WAC 246-290-490 (8)(a)(i)
4	CAPACITY STUDIES – SEWAGE TREATMENT PLANTS Studies of peak and average flow used to evaluate the status of treatment plant operating capacity.	OFM	3 years	Destroy when obsolete or superseded	GS55-06B-01	
5	CROSS-CONNECTION CONTROL ANNUAL SUMMARY REPORTS Annual reports summarizing cross-connection control activities by water utilities required by the Washington State Department of Health. New Series – 01/05	OPR	5 years – See remarks	Destroy when obsolete or superseded	GS55-06A-25	Reference WAC 246-290-490 (8)(a)(iii)
6	DISCHARGE MONITORING REPORTS– SEWAGE TREATMENT PLANTS Daily reports required by the Washington State Department of Ecology.	OPR	6 years	Destroy when obsolete or superseded	GS55-06B-02	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SEWER AND WATER SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	EQUIVALENT CUSTOMER UNIT (ECU) REPORTS – SEWAGE TREATMENT PLANTS Annual report on volume of customers served by treatment plant.	OFM	6 years	Destroy when obsolete or superseded	GS55-06B-03	
8	FACILITY RETIREMENT AUTHORIZATION – SEWER AND WATER SYSTEM DOCUMENTATION Official authorization for facility retirement, including basis of determination and estimates of cost.	OPR	Disposition or sale of facility plus 10 years	Destroy when obsolete or superseded	GS55-06A-04	
9	FACILITY RETIREMENT WORK ORDER – SEWER AND WATER SYSTEM DOCUMENTATION Basic record of facility removal and replacement.	OPR	Disposition or sale of facility plus 10 years	Destroy when obsolete or superseded	GS55-06A-05	
10	FLOW RECORD– WATER SYSTEM DOCUMENTATION Documentation of volume in distribution system.	OFM	3 years	Destroy when obsolete or superseded	GS55-06A-06	
11	FLOW REPORTS – SEWAGE TREATMENT PLANTS Daily reports of influent and effluent flow.	OFM	3 years	Destroy when obsolete or superseded	GS55-06B-04	
12	FLUORIDE CHARTS –WATER SYSTEM DOCUMENTATION Test reports showing water usage and amount of fluoride in water system.	OFM	3 years	Destroy when obsolete or superseded	GS55-06A-07	
13	GRINDER PUMP MAINTENANCE AND LOCATION RECORDS– SEWER AND WATER SYSTEM DOCUMENTATION ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-06A-08	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SEWER AND WATER SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
14	HISTORY FILES – SEWAGE TREATMENT PLANTS Documentation of plant operations and compliance with state and federal permit requirements. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Life of the facility plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-06B-07	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
15	HYDRANT RECORDS – WATER SYSTEM DOCUMENTATION Documentation of hydrant location, specifications, maintenance history, etc. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-06A-09	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list of the locations of other copies inside or outside the agency.
16	INDUSTRIAL WASTE PERMITS – SEWER SYSTEM DOCUMENTATION Permits issued to industrial customers allowing them to discharge industrial waste into the local government sewer system. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Expiration plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-06A-10	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list of the locations of other copies inside or outside the agency.
17	INSPECTION AND MONITORING REPORTS – SEWER AND WATER SYSTEM DOCUMENTATION Reports on the system operating conditions such as chlorine test, laboratory reports, television surveillance tapes, telemetry, etc.	OFM	3 years	Destroy when obsolete or superseded	GS55-06A-17	
18	LABORATORY PERFORMANCE EVALUATIONS – SEWAGE TREATMENT PLANTS Periodic blind test performed by the Washington State Department of Ecology.	OPR	6 years	Destroy when obsolete or superseded	GS55-06B-05	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SEWER AND WATER SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
19	MANHOLE RECORDS– SEWER AND WATER SYSTEM DOCUMENTATION Documentation of location, installation, size, flow direction, maintenance, materials, etc. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-06A-11	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list of the locations of other copies inside or outside the agency.
20	MAPS AND GEOGRAPHIC DATA – SEWER AND WATER SYSTEM DOCUMENTATION ESSENTIAL RECORD - Needs security microfilm backup -See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-06A-18	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
21	METER RECORDS – SEWER AND WATER SYSTEM DOCUMENTATION Account of water meter installation, serial number, location, etc. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-06A-12	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list of the locations of other copies inside or outside the agency.
22	NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) PERMIT – SEWER SYSTEM DOCUMENTATION	OPR	Expiration plus 6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS55-06A-24	Please contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
23	OPERATIONS AND MAINTENANCE MANUALS – SEWAGE TREATMENT PLANTS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-06B-06	This records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SEWER AND WATER SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
24	OPERATORS LOG – SEWAGE TREATMENT PLANTS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-06B-08	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
25	PIPE RECORDS– SEWER AND WATER SYSTEM DOCUMENTATION Records of pipe installation, location, specifications, maintenance history, etc. ESSENTIAL RECORD - Needs security backup – See remarks.	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-06A-13	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list of the locations of other copies inside or outside the agency.
26	POLLUTION AND POLLUTION CONTROL STUDIES– SEWER AND WATER SYSTEM DOCUMENTATION Studies and reports regarding levels and means of control for water, air and other types of pollution caused by district facilities and operations.	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-06A-14	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
27	POLLUTION CONTROL INSPECTION REPORTS– SEWER AND WATER SYSTEM DOCUMENTATION Reports on levels of pollutants being discharged, processed, and removed through the system. Also measurements of pollutants in system's effluent.	OFM	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-06A-15	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
28	PROJECT FILES – SEWER AND WATER SYSTEM DOCUMENTATION Official account of various water system construction projects, including work orders, ledgers, studies, etc.	OPR	Life of facility plus 6 years	Destroy when obsolete or superseded	GS55-06A-19	
29	SEWER JETTING AND VACTORING RECORDS Documentation of routine cleaning of sewer lines.	OFM	3 years	Destroy when obsolete or superseded	GS55-06A-16	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SEWER AND WATER SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
30	SURFACE WATER GROUNDWATER PERMIT FILES Documents the amount, function, and use of surface and groundwater. Includes background and permit files New series – 09/04	OPR	Termination of permit plus 6 years	Destroy when obsolete or superseded	GS55-06B-12	
31	VALVE RECORDS– SEWER AND WATER SYSTEM DOCUMENTATION Account of valve location, specifications, maintenance history, etc. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-06A-20	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
32	VIBRATION ANALYSIS DATA– SEWAGE TREATMENT PLANTS Data collected on treatment plant equipment for use in preventative maintenance and troubleshooting.	OFM	3 years	Destroy when obsolete or superseded	GS55-06B-10	
33	WATER AND SEWER SYSTEM COMPREHENSIVE PLANS	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	GS55-06A-22	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
34	WATER AVAILABILITY/SEWER SYSTEM HOOKUP REQUEST FORMS May be required for building permit for properties hooked up to a provider's water supply and/or sewer system. Series revised -Added “/SEWER SYSTEM HOOKUP” to title, and “and/or sewer system.” to description – 11/02	OFM	2 years	Destroy when obsolete or superseded	GS50-11-21	
35	WATER CONSUMPTION REPORTS– SEWAGE TREATMENT PLANTS	OPR	6 years	Destroy when obsolete or superseded	GS55-06B-11	
36	WATER TEST REPORTS Tests and correspondence related to Health Department or District requirements.	OPR	6 years	Destroy when obsolete or superseded	GS55-06A-21	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SEWER AND WATER SYSTEM DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
37	WILDLIFE HABITAT MANAGEMENT PLAN- SEWER AND WATER SYSTEM DOCUMENTATION	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	GS55-06A-23	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: SOCIAL SERVICES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

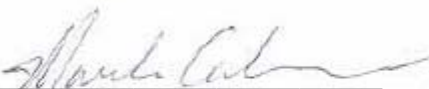
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SOCIAL SERVICES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	CLIENT CASE FILES (TREATMENT COMPLETED AND CASE CLOSED) – SOCIAL SERVICES ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Adults: 8 years Minors: 8 years, or 3 years past age of majority, whichever is longer	Destroy when obsolete or superseded	GS50-25-02	Reference RCW 4.16.350. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
2	CLIENT SCREENING AND REFERRAL FILES (COMPLETED AND CLOSED) – SOCIAL SERVICES ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	10 years	Destroy when obsolete or superseded	GS50-25-03	Reference RCW 4.16.350. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
3	FACILITIES INSPECTIONS AND CERTIFICATIONS – SOCIAL SERVICES ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Until superseded or terminated plus 6 years	Destroy when obsolete or superseded	GS50-25-04	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
4	INVOLUNTARY COMMITMENT CASE FILES – SOCIAL SERVICES (PROCEEDINGS COMPLETED AND CASE CLOSED)	OFM	Superior Court retains the primary copy	10 years	GS50-25-05	Reference RCW 4.16.350.
5	PROJECT FILES – SOCIAL SERVICES	OPR	Completion of project plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-25-06	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	STATISTICAL REPORTS TO DEPARTMENT OF SOCIAL AND HEALTH SERVICES OR OTHER SUCH AGENCIES – SOCIAL SERVICES	OFM	2 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-25-07	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: SOLID WASTE MANAGEMENT

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

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These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SOLID WASTE MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	CERTIFICATE OF DISPOSAL AND DESTRUCTION OF HAZARDOUS WASTE ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	GS50-26-01	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
2	COMPREHENSIVE SOLID WASTE PLANS	OPR	Destroy when superseded plus 6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-26-16	Please contact your Regional Archivist before destroying this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3	CONSTRUCTION SITE INSPECTIONS – SOLID WASTE MANAGEMENT Inspection of construction projects to verify proper waste disposal.	OPR	6 years	Destroy when obsolete or superseded	GS50-26-02	
4	DAILY TRIP STATUS REPORT/LOG – SOLID WASTE MANAGEMENT Documentation of the number of loads dumped by each hauler for the day.	OFM	3 years	Destroy when obsolete or superseded	GS50-26-04	
5	LANDFILL / TRANSFER STATION HISTORY FILES Contains background information on each site such as deeds, contracts, surveys, maps, plans, rights of way, and legal descriptions. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-26-05	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
6	LANDFILL / TRANSFER STATION SURVEY FILES May include maps, sketches, field notes, and volume calculations. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-26-06	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SOLID WASTE MANAGEMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	LANDFILL SITE CLOSURE AND CUSTODIAL FILES Reports and monitoring data required by statute for each landfill site for which the agency is the legal custodian. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-26-07	The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
8	LANDFILL/TRANSFER STATION SITE TESTING AND MONITORING RECORDS Tests to monitor conditions on site, including groundwater, surface water, leaching, gases, weather and fill settlement. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	6 years	Destroy when obsolete or superseded	GS50-26-08	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
9	OUTSIDE WASTE GENERATOR CLEARANCE DOCUMENTATION Documentation of clearance for parties outside of the agency's jurisdiction to dispose of waste at agency landfills.	OPR	Expiration plus 6 years	Destroy when obsolete or superseded	GS50-26-09	
10	SCALE HOUSE VIDEO MONITORING TAPES Used for surveillance of scale houses at landfills, transfer stations, and other solid waste operating sites.	OFM	3 years	Destroy when obsolete or superseded	GS50-26-10	
11	SOLID WASTE LOAD CHECK LOGS Document checking of solid waste loads for unacceptable waste.	OFM	3 years	Destroy when obsolete or superseded	GS50-26-11	
12	SOLID WASTE LOAD TRIP TICKETS Documentation of number and content of loads dumped by each hauler.	OFM	3 years	Destroy when obsolete or superseded	GS50-26-12	
13	UNACCEPTABLE WASTE STATEMENTS Issued to generators or haulers caught dumping unacceptable waste at landfills. May include warning, follow-up, and penalty documentation.	OFM	Resolution plus 6 years	Destroy when obsolete or superseded	GS50-26-14	
14	WASTE DISPOSAL VIOLATION FILES – SOLID WASTE MANAGEMENT	OPR	Resolution plus 6 years	Destroy when obsolete or superseded	GS50-26-15	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: SURFACE WATER DRAINAGE DOCUMENTATION

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

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These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:


Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SURFACE WATER DRAINAGE DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	DIKING AND DRAINAGE DISTRICT HISTORY FILES Documentation on the formation, location, and activities in each district.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-01	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	DIKING AND DRAINAGE FACILITY MAINTENANCE HISTORY FILES Documentation of ongoing inspection and maintenance.	OPR	Life of facility	Destroy when obsolete or superseded	GS50-27-02	
3	DIKING AND DRAINAGE MAINTENANCE PROJECT FILES Documentation of requests for funding and execution of non-routine maintenance projects.	OPR	Completion of project plus 6 years	Destroy when obsolete or superseded	GS50-27-03	
4	DRAINAGE AND WATER QUALITY COMPLAINT AND INVESTIGATION FILES Complaints filed by citizens regarding drainage and surface water quality conditions in areas of agency jurisdiction.	OPR	Resolution of complaint plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-04	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	DRAINAGE BASIN AND WATERSHED HISTORY FILES Background documentation for planning and capital improvement projects as well as lawsuits.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-05	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	FLOOD CONTROL PLAN Comprehensive management plans for flood control within the agency's jurisdiction. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Clerk of governing council, commission, or board - PERMANENT - 1 copy archival - See remarks	Until obsolete or superseded	GS50-27-06	Please contact your Regional Archivist before destroying the original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SURFACE WATER DRAINAGE DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
7	FLOOD CONTROL PLAN DEVELOPMENT FILES Documentation of the development of the agency's current flood control plan.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-07	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
8	FLOOD DAMAGE SURVEY REPORTS Documentation of physical and monetary damage done by individual floods submitted in support of requests for federal disaster assistance aid. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-08	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
9	FLOOD FILES Documentation of significant individual floods and flooding issues.	OFM	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-09	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
10	MONITORING, TEST AND SAMPLE DATA – SURFACE WATER, DRAINAGE, AND FLOOD CONTROL Surface water, flood, and drainage related data collected by the agency, including stream flow, rainfall, and water samples.	OFM	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-10	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
11	NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) PERMIT – SURFACE WATER, DRAINAGE, AND FLOOD CONTROL	OPR	Expiration plus 6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	GS55-06A-24	Please contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
12	PLANNING REPORTS, STUDIES, MODELS AND ANALYSIS – SURFACE WATER, DRAINAGE, AND FLOOD CONTROL	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-32	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SURFACE WATER DRAINAGE DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
13	RIVER MANAGEMENT PROJECT FILES Document requests for funding and execution of river improvement projects.	OPR	Completion of project plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-12	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
14	RIVER MODELING FILES Documentation of characteristics and conditions of individual rivers used for developing plans and projects.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-13	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
15	SURFACE WATER MANAGEMENT PROJECT PLANS AND SPECIFICATIONS ESSENTIAL RECORD - Needs security microfilm backup – See remarks.	OPR	Completion of project plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-14	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
16	SURFACE WATER/DRAINAGE CAPITAL IMPROVEMENT PROJECTS Documentation of design and development work done on construction projects intended to relieve drainage and other surface water management problems (For construction project files, plans, and specifications retention requirements, see public works/engineering).	OPR	Completion of project plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-15	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
17	WATER QUALITY PROJECT FILES– SURFACE WATER, DRAINAGE, AND FLOOD CONTROL Documentation of planning projects for improvement of surface water quality.	OPR	Completion of project plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-16	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SURFACE WATER DRAINAGE DOCUMENTATION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
18	WATERSHED MANAGEMENT POLICY FILES Background documentation for agency surface water management policy development projects.	OFM	Completion of project plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-27-17	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: SURPLUS PROPERTY

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

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Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

SURPLUS PROPERTY

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ADVANCE NOTIFICATIONS OF AUCTION	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-08C-01	
2	AUCTION AUTHORIZATION FILES Copy of resolution or ordinance and related documents authorizing auction of surplus property.	OFM	Clerk of governing council, commission, or board - PERMANENT - Attach to resolution or ordinance	Destroy when obsolete or superseded	GS50-08C-02	
3	BILL OF SALE – SURPLUS PROPERTY Series deleted. Covered by "BILLS OF SALE"	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-04	
4	SURPLUS PROPERTY INVENTORY	OPR	6 years	Destroy when obsolete or superseded	GS50-08C-06	
5	SURPLUS PROPERTY INVENTORY TRANSFER SHEET Transferring specific fixed assets from departments to Surplus Property.	OFM	3 years	Destroy when obsolete or superseded	GS50-08C-07	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

RECORDS CATEGORY: TRANSIT AUTHORITIES

The following general records retention schedule sets minimum retention requirements and provides all local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. The signatures of the Local Records Committee signify approval of the disposition of these records. Each records series is assigned a Disposition Authority Number (DAN). These numbers should be cited in the documentation the agency maintains for the records it destroys.

You may retain records longer than the retention period approved by the Local Records Committee. However, most records are subject to public disclosure and legal discovery until they are disposed of. Any record that is or may be required in an active or pending court case must be retained and made available until the case is closed or settled, regardless of the retention period pertaining to that record.

Some records may be subject to federal audit requirements, or are governed by federal statute(s). In all cases, federal statutes supersede state statutes and local ordinances. Citations have been added to the instructions column for some of these series.

When using this schedule, records officers/coordinators should determine whether they are dealing with the official/primary record or just a secondary copy.

These schedules are written with general titles and descriptions rather than identifying specific individual documents or forms. A record with content and function that is substantially the same as an item described in this schedule should be considered covered by that series.

Keep in mind that you will not necessarily have all records listed in this schedule and that you are not required to create all of the series listed. This manual includes all possible records series that may be maintained by local government agencies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

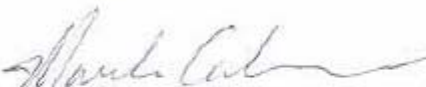
Official Public Records (OPR) - are those records identified and required by RCW 40.14.010(1) that have significant legal or fiscal value.

Office Files and Memoranda (OFM) – are those records that have only administrative value per RCW 40.14.010(2).

Archival and Potential Archival Value – The Archival designation identifies records series that must be transferred to your Regional Archives at the end of their approved retention period. The Potential Archival Value designation identifies records that have potential historical research value. These records must be appraised by the Regional Archives system for transfer to appropriate preservation and storage. Contact your Regional Archivist to arrange for appraisal and transfer of these records.

Essential Record – This designation identifies records that are, in the event of disaster, essential for the resumption and/or continuation of agency operations. They recreate the legal and financial status of the agency. These records fulfill the obligations to local, state, and federal governments, and outside interests.

APPROVED AS REVISED BY THE WASHINGTON STATE LOCAL RECORDS COMMITTEE – UPDATED JANUARY 2005



For the Attorney General: Mark Calkins



For the State Auditor: Mark Rapozo



The State Archivist: Jerry Handfield

**GENERAL RECORDS RETENTION SCHEDULE FOR
ALL LOCAL GOVERNMENT AGENCIES**

TRANSIT AUTHORITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
1	ACCESSIBLE BOARDINGS REPORTS – TRANSIT AUTHORITIES	OFM	5 years	Destroy when obsolete or superseded	GS50-31-01	
2	AMERICANS WITH DISABILITIES ACT (ADA) CUSTOMER ELIGIBILITY FILES	OFM	6 years after termination of service or participation by customer	Destroy when obsolete or superseded	GS50-31-02	
3	BUS (COACH) ASSIGNMENT SHEETS	OFM	2 years	Destroy when obsolete or superseded	GS50-31-03	
4	BUS (COACH) CHANGE SHEETS	OFM	2 years	Destroy when obsolete or superseded	GS50-31-04	
5	BUS (COACH) CLEANER CHECK SHEETS	OFM	30 days	Destroy when obsolete or superseded	GS50-31-05	
6	BUS (COACH) MAINTENANCE HISTORY FILES	OFM	Until sale or disposal of vehicle	Destroy when obsolete or superseded	GS50-06E-06	
7	BUS ROUTE SCHEDULES/TIMETABLES	OFM	Until superseded plus 3 years	Destroy when obsolete or superseded	GS50-31-07	
8	BUS SHELTER HISTORY FILES Correspondence with Public Works and contractors about new shelter locations. Includes site permission for rights of way and easements.	OFM	Keep until site vacation	Destroy when obsolete or superseded	GS50-31-08	
9	BUS SHELTER LISTINGS Listing of shelter sights. Adopt a shelter program.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-31-09	
10	CUSTOMER COMMENT FILES	OPR	6 years	Destroy when obsolete or superseded	GS50-31-10	
11	DISPATCH FILES - TRANSIT AUTHORITIES Boarding and alighting, extra board weekly projections and assignments, daily work schedules extra board, bid mark-ups.	OFM	6 years	Destroy when obsolete or superseded	GS50-31-11	
12	DISPATCH CHANGE SHEETS – TRANSIT AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS50-31-12	
13	DISPATCH LOGS – TRANSIT AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS50-31-13	
14	EMPLOYEE WORK SCHEDULES – TRANSIT AUTHORITIES	OFM	1 year	Destroy when obsolete or superseded	GS50-31-14	
15	FARE INFORMATION REFERENCE AND BACKGROUND FILES – TRANSIT AUTHORITIES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-31-15	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
16	FEDERAL TRANSIT ADMINISTRATION (FTA) NATIONAL TRANSIT DATABASE REPORT (ALSO KNOWN AS SECTION 15 REPORT) Operating and financial data reported annually to the FTA and used as the basis for calculating FTA funding provided to each transit district or authority.	OPR	3 years after submittal of quarterly, annual or final expenditure report – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-31-16	Reference U.S. Department of Transportation Post-Award Requirements for the Retention and Access to Records, 49 CFR 18 Subpart C Section 18.42. If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
17	LOST AND FOUND REPORTS – TRANSIT AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS50-31-17	
18	MARKETING AND PROMOTION PROJECT FILES– TRANSIT AUTHORITIES Reference materials relating to transit promotion.	OFM	Completion of project plus 3 years	Destroy when obsolete or superseded	GS50-31-18	
19	MISSED TRIP LOGS – TRANSIT AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS50-31-19	
20	ON-TIME PERFORMANCE REPORTS – TRANSIT AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS50-31-20	
21	OPERATIONS REPORTS – TRANSIT AUTHORITIES Daily, weekly or other periodic reports summarizing transit system operations.	OFM	3 years	Destroy when obsolete or superseded	GS50-31-21	
22	OPERATOR ASSIGNMENT AND SHAKE-UP RECORDS – TRANSIT AUTHORITIES Documentation of assignment of individual operators to routes and shifts.	OFM	3 years	Destroy when obsolete or superseded	GS50-31-22	
23	OPERATOR INCIDENT REPORTS – TRANSIT AUTHORITIES	OPR	6 years	Destroy when obsolete or superseded	GS50-31-23	

SUPERSEDED

**GENERAL RECORDS RETENTION SCHEDULE FOR
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TRANSIT AUTHORITIES

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER	REMARKS
			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
24	OPERATOR PRE/POST-SHIFT INSPECTION REPORTS – TRANSIT AUTHORITIES Reports of operators' inspections of buses at the beginning and end of their shifts.	OFM	3 years	Destroy when obsolete or superseded	GS50-31-24	
25	PARATRANSIT MANIFESTS	OFM	3 years	Destroy when obsolete or superseded	GS50-31-25	
26	PARATRANSIT SERVICE HISTORY FILES OR DATABASE	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-31-26	
27	PROPERTY APPRAISAL FILES – TRANSIT AUTHORITIES	OPR	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-31-27	
28	RADIO DISPATCH RECORDINGS Recordings of dispatch radio messages to and from transit operators. New Series – 07/03	OFM	90 days	Destroy when obsolete or superseded	GS50-31-43	
29	RADIO LOGS – TRANSIT AUTHORITIES	OFM	90 days	Destroy when obsolete or superseded	GS50-31-28	
30	RIDEMATCHING PARTICIPANT INFORMATION Information maintained for each participant.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-31-29	
31	RIDERSHIP REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-31-30	
32	ROAD CALL REPORTS – TRANSIT AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS50-31-31	
33	ROUTE CHANGE FILES Correspondence and working papers regarding route changes.	OFM	3 years	Destroy when obsolete or superseded	GS50-31-32	
34	ROUTE HISTORY DOCUMENTATION	OFM	Life of the route	Destroy when obsolete or superseded	GS50-31-33	
35	ROUTE MAINTENANCE FILES Check sheets used to record needed improvements in the route (actual physical improvements).	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-31-34	
36	SALES REPORTS – TRANSIT AUTHORITIES Periodic (daily, weekly, etc) reports of tickets, passes and other items sold.	OFM	3 years	Destroy when obsolete or superseded	GS50-31-35	
37	SERVICE AREA ANNEXATION PLANS – TRANSIT AUTHORITIES	OFM	6 years	Destroy when obsolete or superseded	GS50-31-36	

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			PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	SECONDARY (ALL OTHER) RECORD COPIES		
38	SERVICE PERFORMANCE EVALUATIONS – TRANSIT AUTHORITIES	OFM	1 year	Destroy when obsolete or superseded	GS50-31-37	
39	SERVICE PLANNING AND DEVELOPMENT FILES – TRANSIT AUTHORITIES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-31-38	
40	TAXI SCRIP RECEIPTS Verifies receipt of taxi scrip for sales to public.	OPR	6 years	Destroy when obsolete or superseded	GS50-31-39	
41	TRANSIT PLANNING REFERENCE FILES Files containing surveys, statistics, and correspondence used for future planning in transit.	OFM	Destroy when obsolete or superseded – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-31-40	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
42	TRIENNIAL REVIEW AUDITS – TRANSIT AUTHORITIES	OPR	3 years after submittal of quarterly, annual or final expenditure report – Potential archival value – See remarks	Destroy when obsolete or superseded	GS50-31-41	Reference U.S. Department of Transportation Post-Award Requirements for the Retention and Access to Records, 49 CFR 18 Subpart C Section 18.42. If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
43	VANPOOL MONTHLY REPORTS – TRANSIT AUTHORITIES	OPR	Termination of pool plus 6 years	Destroy when obsolete or superseded	GS50-31-42	
44	WORK ORDERS – TRANSIT AUTHORITIES	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-13	

SUPERSEDED