

WASHINGTON STATE ARCHIVES & RECORDS MANAGEMENT DIVISION

SCHOOL DISTRICTS OF WASHINGTON STATE

**RECORDS MANAGEMENT
GUIDELINES**

[http://www.secstate.wa.gov/archives/doc/Records Management Guidelines.doc](http://www.secstate.wa.gov/archives/doc/Records%20Management%20Guidelines.doc)

and

**GENERAL RECORDS RETENTION
SCHEDULES**

SUPERSEDED

*Approved and Issued by the Washington State Local Records Committee
APRIL 1999*

*Watch for the revised edition in early spring 2002 –
See also Local Government General Records Retention Schedules revised 2001 for revisions to Records
Common to All Local Governments*

[http://www.secstate.wa.gov/archives/pdf/LOCAL GOV manual.pdf](http://www.secstate.wa.gov/archives/pdf/LOCAL%20GOV%20manual.pdf)

GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS

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**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ACCOUNTING

Disposition Authority No. GS51-02

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ACCOUNTS PAYABLE CONTROL Lists invoice totals and taxes. Used to balance against computer generated warrant register.	OFM	1 month	Destroy when obsolete or superseded	
2	APPLICATION FOR DUPLICATE INSTRUMENT, AFFIDAVIT AND BOND 1. Authority to issue duplicate check or warrant in case of loss. 2. Notarized oath that original warrant was lost and requesting a replacement.	OPR	6 years	Destroy when obsolete or superseded	
3	APPORTIONMENT REPORT/STATE OF WASHINGTON	OPR	6 years	Destroy when obsolete or superseded	
4	BANKING RECORDS Canceled checks, check registers, deposit slips, bank statements.	OPR	6 years	Destroy when obsolete or superseded	
5	CANCELLED WARRANTS	OPR	6 years	Destroy when obsolete or superseded	
6	CASH RECEIPTS TRANSMITTALS, COUNTY Forms transmitting money between district and county.	OPR	6 years	Until completion of State Auditor's examination report	
7	CASH RECEIPTS TRANSMITTALS, INTERNAL Forms transmitting money from school or department to central accounting.	OFM	3 years	Destroy when obsolete or superseded	
8	CASH REGISTER TAPES	OFM	3 years	Destroy when obsolete or superseded	
9	COUNTY TREASURER FINANCIAL REPORTS	OPR	Retained by County Treasurer	Until completion of State Auditor's examination report	
10	EXPENDITURE TRANSACTION REPORTS Adjustments to coding of expenditures and error corrections.	OPR	6 years	Destroy when obsolete or superseded	
11	FINANCIAL REPORTS Monthly, quarterly and annual reports made to and/or by the department building regarding its expenditures and the status of its budget.	OFM	Until completion of State Auditor's examination report	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

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For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

ACCOUNTING

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ACCOUNTING

Disposition Authority No. GS51-02

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
12	FIXED ASSET INVENTORY CHANGE FORMS Forms used to update fixed assets inventory.	OFM	3 years	Until completion of update	
13	FIXED ASSETS INVENTORY LISTING Year-end report.	OFM	3 years	Destroy when obsolete or superseded	
14	GENERAL LEDGER	OPR	6 years	Destroy when obsolete or superseded	
15	INTERNAL REVENUE SERVICE (IRS) FORM 1099	OPR	6 years	Destroy when obsolete or superseded	
16	INTERNAL REVENUE SERVICE (IRS) FORM W-9	OPR	6 years	Destroy when obsolete or superseded	
17	INVENTORY RECONCILIATION REPORT Forms used to balance inventory with units purchased and sold for vending machines, event tickets, fund-raisers, etc.	OFM	3 years	Destroy when obsolete or superseded	
18	INVOICE, DISTRICT Invoice and back-up documentation.	OPR	6 years	Destroy when obsolete or superseded	
19	JOURNALS	OPR	6 years	Destroy when obsolete or superseded	
20	PETTY CASH CLAIM FORMS AND RECEIPTS	OPR	6 years	Until completion of State Auditor's examination report	
21	PETTY CASH MONTHLY RECONCILIATION REPORTS	OFM	3 years	Destroy when obsolete or superseded	
22	PETTY CASH REGISTER	OPR	6 years	Destroy when obsolete or superseded	
23	PURCHASE ORDERS AND/OR PURCHASE REQUISITIONS Used as pay documents.	OPR	6 years	Until completion of State Auditor's examination report	
24	RECEIPTS	OPR	6 years	Destroy when obsolete or superseded	
25	SIGNATURE AUTHORIZATION LIST	OPR	Until superseded plus 6 years	Destroy when obsolete or superseded	
26	STATE AUDITOR'S EXAMINATION REPORT	OPR	6 years	Destroy when obsolete or superseded	
27	STUDENT FEE AND FINE STATEMENTS	OPR	6 years	Destroy when obsolete or superseded	

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**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ACCOUNTING

Disposition Authority No. GS51-02

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
28	TRAVEL AUTHORIZATIONS/VOUCHERS	OPR	6 years	Until completion of State Auditor's examination report	
29	TRIAL BALANCES	OFM	Until completion of State Auditor's examination report	Destroy when obsolete or superseded	
30	VENDOR FILES Includes vendor lists, changes, additions, and deletions.	OFM	Until completion of State Auditor's examination report	Destroy when obsolete or superseded	
31	VOUCHERS Includes claims, work orders and other supporting documents.	OPR	6 years	Until completion of State Auditor's examination report	
32	WARRANT REGISTER	OPR	6 years	Destroy when obsolete or superseded	

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ACCOUNTING

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

CATEGORY: 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:

1	CATALOGS, TRADE JOURNALS, AND OTHER PRINTED MATERIALS Received from other offices, commercial firms, or private institutions, which require no action and are not needed for documentary purposes.
2	INFORMATIONAL COPIES Electrostatic, photocopy, magnetic, or other type of copy of correspondence, completed forms, bulletins, etc., prepared for reference and informational distribution.
3	LETTERS OF TRANSMITTAL Letters of transmittal, which do not add any information to the transmitted materials.
4	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.
5	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.
6	REPRODUCTION MATERIALS Includes materials such as stencils, hectograph masters and offset plates.
7	ROUTING SLIPS Routing slips used to direct the distribution of documents.
8	SHORTHAND NOTES Shorthand notes, stenotype tapes, word processing disks, and mechanical recordings, which have been transcribed into typewritten or printed form.
9	STOCKS OF OUTDATED OR SUPERSEDED PUBLICATIONS Stocks of agency publications, forms, and printed documents, preserved for supply purposes, which are superseded, outdated, or otherwise valueless (a minimum supply of each publication must be on file with the state library for distribution purposes, and one copy should be sent to the state archives for historical preservation), EXCEPT FOR ACCOUNTABLE FORMS WHICH MUST BE EXAMINED BY THE STATE AUDITOR'S OFFICE BEFORE BEING DESTROYED.
10	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.

SUPERSEDED

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ADMINISTRATIVE MATERIALS WITH NO RETENTION VALUE

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS & SCHOOLS

Disposition Authority No. GS51-01

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ADMINISTRATIVE PROCEDURES AND INSTRUCTIONS	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	
2	ADMINISTRATIVE WORKING FILES Subject files containing informational copies of various records series organized by issue, person, subject, or other areas of interest.	OFM	District option - elected official, executive and department head files are potentially archival - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of elected official, executive, or department head files.
3	AFFIRMATIVE ACTION COMPLIANCE REPORTS	OFM	Retained in affirmative action office	Destroy when obsolete or superseded	
4	ANNUAL REPORTS Office reference copies of reports of activities submitted yearly to the school board.	OFM	Clerk/Secretary of the Board - PERMANENT - 1 copy archival - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
5	APPOINTMENT CALENDARS Provides a record of appointments, "to do" lists, and meeting schedules.	OFM	Current year – See remarks	Destroy when obsolete or superseded	Elected officials and department heads should keep appointment calendars at least 1 additional year to document their activities for legal purposes.
6	BIOGRAPHICAL FILES ON DISTRICT OFFICIALS AND STAFF	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
7	BUDGET AND BUDGET DEVELOPMENT FILES Office reference copies of the final budget and budget development files. The official record copies of the final budgets are retained permanently as reference attachments to the ordinances or resolutions which adopt them.	OFM	Final budget held by Clerk/Secretary of the Board - PERMANENT	Destroy when obsolete or superseded	
8	BYLAWS, ASSOCIATED STUDENT BODY AND STUDENT ORGANIZATIONS	OPR	Permanent (school) – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
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	District option - elected official, executive, and department head files are potentially archival - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of elected official, executive, or department head files.
10	CITIZENS' COMPLAINTS/REQUESTS	OFM	3 years	Destroy when obsolete or superseded	

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ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS AND SCHOOLS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS & SCHOOLS

Disposition Authority No. GS51-01

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
11	CLAIMS FOR DAMAGES	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	
12	CONTRACTS AND AGREEMENTS	OPR	Termination plus 6 years	Destroy when obsolete or superseded	
13	CORRESPONDENCE Letters, memoranda, and attached materials sent and received during the course of District business.	OFM	2 years - elected official, executive, and department head files are potentially archival - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of elected official, executive, or department head files.
14	DESCRIPTIVE GUIDE TO SCHOOL DISTRICT ADMINISTRATION AND STAFFING	OFM	Retained in superintendent's office	Destroy when obsolete or superseded	
15	DISTRICT HISTORY FILES	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
16	DISTRICT PHOTOGRAPHS AND OTHER AUDIO VISUAL MATERIAL Photographic negatives may be held in the Regional Archives for permanent preservation and security backup - See remarks .	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record or to discuss transfer of negatives for permanent preservation and security backup.
17	EMPLOYMENT APPLICATIONS (NOT HIRED) Office copies of employment applications submitted by applicants who were not hired.	OFM	Personnel office - 3 years	Destroy when obsolete or superseded	
18	ENROLLMENT REPORTS THAT GENERATE APPORTIONMENT FUNDING	OPR	6 years	Until completion of State Auditor's examination report	
19	FACILITY USE AUTHORIZATION / PERMIT	OPR	6 years	Destroy when obsolete or superseded	
20	FINANCIAL REPORTS Office reference copies of monthly, quarterly, and annual reports made to and/or by the department regarding its expenditures and the status of its budget.	OFM	Retained in business and accounting office	Destroy when obsolete or superseded	
21	FIRE AND OTHER EMERGENCY DRILL REPORTS	OFM	Retained in safety/risk management office	Destroy when obsolete or superseded	

SUPERSEDED

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ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS AND SCHOOLS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS & SCHOOLS

Disposition Authority No. GS51-01

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
22	FIRST AID / CPR TRAINING DOCUMENTATION	OPR	Until superseded plus 6 years	Destroy when obsolete or superseded	
23	FISCAL, PURCHASE AND RECEIVING DOCUMENTS Office reference copies of vouchers, purchase orders, field orders, requisitions, and invoices. The official record copies of these records are retained for 6 years by the District finance and/or purchasing officer.	OFM	Finance or Purchasing Office - 6 years	Destroy when obsolete or superseded	
24	JOB DESCRIPTIONS Duties and qualifications necessary for each job.	OFM	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	
25	LEGAL OPINIONS Office reference copies of official legal opinions issued and retained permanently by the District attorney. If the District attorney is not a District employee, the permanent copy should be held by the District Superintendent.	OFM	District attorney - PERMANENT	Destroy when obsolete or superseded	
26	MAILING LISTS	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	
27	MINUTES, ASSOCIATED STUDENT BODY AND STUDENT ORGANIZATIONS	OPR	Permanent (school) – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
28	NEGOTIATED SCHOOL CALENDARS	OFM	Retained in superintendent's office	Destroy when obsolete or superseded	
29	NEWSPAPER CLIPPINGS	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
30	OFFICIAL DISTRICT POLICY AND PROCEDURE DIRECTIVES, REGULATIONS, AND RULES ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Superintendent - Permanent – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
31	PAYROLL REPORTS Office reference copies of reports issued and retained by the payroll office for 6 years or to satisfy state retirement system audit requirements.	OFM	Payroll office - 6 years, OR 60 years if needed for retirement audit	Destroy when obsolete or superseded	

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**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS & SCHOOLS

Disposition Authority No. GS51-01

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
32	PERSONNEL FILES Office reference copies of files compiled and retained for 6 years after termination of employment by the personnel department.	OFM	Personnel office - Termination of employment plus 6 years	Destroy when obsolete or superseded	
33	PRESS RELEASES	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
34	PUBLIC OPINION POLLS	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
35	PUBLIC RESEARCH ACCESS REQUEST	OPR	Resolution of request plus 3 years	Destroy when obsolete or superseded	
36	RECEIPTS FOR CASH RECEIVED Office reference copies.	OFM	Finance office - 6 years	3 years	
37	REPORTS REQUIRED BY SPI	OFM	Retained by SPI	Until completion of State Auditor's examination report.	
38	REPORTS, STUDIES AND SURVEYS	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
39	RESEARCH REQUEST LOG	OFM	Last entry plus 3 years	Destroy when obsolete or superseded	
40	SCHOOL BOARD MEETING AGENDAS Office reference copies.	OFM	Board of Directors - 3 years	Destroy when obsolete or superseded	
41	SCHOOL BOARD MINUTES Office reference copies of minutes retained permanently by the school board.	OPR	Board of Directors - PERMANENT	Destroy when obsolete or superseded	
42	SCHOOL BOARD RESOLUTION DEVELOPMENT FILES Documentation of the analysis and development of resolutions submitted for the approval of the school board	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
43	SCHOOL BOARD RESOLUTIONS Office reference copies of resolutions retained permanently by the school board.	OPR	Board of Directors - PERMANENT	Destroy when obsolete or superseded	
44	SCRAPBOOKS AND ALBUMS	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.

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ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS AND SCHOOLS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ADMINISTRATIVE RECORDS COMMON TO ALL DEPARTMENTS & SCHOOLS

Disposition Authority No. GS51-01

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
45	SIGN IN / OUT LOGS Includes logs for students, substitute teachers, volunteers, and visitors.	OFM	3 years	Destroy when obsolete or superseded	
46	SIGNATURE OF RECEIPT RECORD Receipts or lists signed by employees to verify receipt of instructions, or documents such as paychecks, leave/benefit reports, retirement system accounting statements, etc.	OFM	1 year	Destroy when obsolete or superseded	
47	SPEECHES BY OFFICIALS AND STAFF REPRESENTING THE DISTRICT	OFM	District option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
48	SPI BULLETINS / MEMORANDA	OFM	Until superseded or expired	Destroy when obsolete or superseded	
49	STATEMENT OF REQUIREMENTS & EXPECTATIONS SIGNED AND RETURNED BY PARENT/GUARDIAN	OFM	Retain for current school year	Destroy when obsolete or superseded	
50	STUDENT DISCIPLINARY ACTION REPORT	OFM	3 years (school)	Destroy when obsolete or superseded	
51	STUDENT/STAFF EMERGENCY INFORMATION FORM	OFM	Retain for current school year	Destroy when obsolete or superseded	
52	TELEVISION / PHOTO RELEASE FORM	OFM	Retain for current school year	Destroy when obsolete or superseded	
53	WORK ORDERS	OFM	Retained in Facilities Administration	Destroy when obsolete or superseded	

SUPERSEDED

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For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ADVISORY COUNCILS, COMMISSIONS, AND COMMITTEES

Disposition Authority No. GS50-05B

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	CORRESPONDENCE	OFM	2 years – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
2	MEETING AGENDAS, MINUTES AND TAPE RECORDINGS Includes all reference and attached documents.	OPR	6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
3	REPORTS SUBMITTED TO DISTRICT	OPR	6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.

SUPERSEDED

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ADVISORY COUNCILS, COMMISSIONS, AND COMMITTEES

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ATHLETICS

Disposition Authority No. GS51-03

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ACCIDENT / INJURY REPORT – STUDENT	OFM	Retained by safety/risk management office	3 years	
2	ANNUAL EVALUATIONS FOR RECREATION / ATHLETIC PROGRAMS	OFM	3 years	Destroy when obsolete or superseded	
3	ATHLETE/TEAM ACHIEVEMENT RECORDS Statistics and league standings.	OPR	PERMANENT Potential archival value– See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
4	ATHLETIC ELIGIBILITY RECORDS Includes physicals, insurance, grade point, appeals, and emergency information.	OFM	3 years – See remarks	Destroy when obsolete or superseded	Primary copy of insurance on individuals should be kept with District Insurance files.
5	COACHES QUALIFICATIONS DOCUMENTATION As per WIAA.	OPR	Termination plus 6 years (primary copy may be retained in personnel office)	Destroy when obsolete or superseded	
6	LEAGUE COACH’S MANUAL	OFM	Retained in league office. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
7	LEAGUE CONSTITUTION AND BYLAWS	OPR	Retained in league office. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
8	LEAGUE MINUTES	OPR	Retained in league office. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record. MICROFILM: This records series may be retained permanently on microfilm instead of hard copy for both on-site use and off-site security storage at the State Archives. Microfilm must meet State Archives standards.
9	LEAGUE POLICIES AND PROCEDURES Handbooks, bulletins, rules, practical arrangements, home team responsibilities.	OPR	Retained in league office. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
10	REGISTRATION FORMS	OFM	3 years or until completion of State Auditor’s examination report	Destroy when obsolete or superseded	
11	SCHEDULES Dates and locations of school games, meets, and matches for season and tournament play.	OFM	3 years	Destroy when obsolete or superseded	
12	SCHOOL PROTESTS OF GAMES	OFM	2 years	Destroy when obsolete or superseded	
13	SCOREBOOK, SCORESHEETS	OFM	2 years	Destroy when obsolete or superseded	

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ATHLETICS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ATHLETICS

Disposition Authority No. GS51-03

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
14	TEAM ROSTERS	OFM	2 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R-E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

ATHLETICS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ATTENDANCE

Disposition Authority No. GS51-04

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ABSENCE EXCUSE	OFM	Retain for current school year	Destroy when obsolete or superseded	
2	ABSENCE NOTIFICATION LOG	OFM	Retain for current school year	Destroy when obsolete or superseded	
3	ABSENCE NOTIFICATION REPORT Written notification to parent/guardian regarding a student's absences.	OFM	Retain for current school year	Destroy when obsolete or superseded	
4	ATTENDANCE RECORD, INDIVIDUAL STUDENT Supports Enrollment Report.	OFM	3 years	Destroy when obsolete or superseded	
5	ATTENDANCE REPORTS	OFM	3 years	Destroy when obsolete or superseded	
6	BUILDING-LEVEL STATISTICAL REPORTS ON SCHOOL ABSENCES REQUIRED BY THE SUPERINTENDENT OF PUBLIC INSTRUCTION	OPR	Superintendent of Public Instruction has primary copy	Destroy when obsolete or superseded	
7	COMPULSORY SCHOOL ATTENDANCE PETITION / DISPOSITION LOGS Summary listing which tracks the filing and disposition of Petitions to Compel School Attendance.	OFM	Last entry plus 6 years	Destroy when obsolete or superseded	
8	DAILY PERIOD ATTENDANCE INPUT Includes electronic and paper input.	OFM	Retain for current school year	Destroy when obsolete or superseded	
9	DISTRICT-LEVEL STATISTICAL REPORTS ON SCHOOL ABSENCES REQUIRED BY THE SUPERINTENDENT OF PUBLIC INSTRUCTION	OPR	Superintendent of Public Instruction has primary copy	3 years	
10	STUDENT ABSENCE CASE FILE Documents districts' dealings with individual students having attendance problems. May include but is not limited to the following: Absence Reports, Absence Report Profiles, Absence/Attendance Discipline Letters (sent to parent/guardian), Petitions to Compel School Attendance/Compulsory School Attendance Filing Forms, Intervention Plan, and Truancy Conference Counseling Forms.	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ATTENDANCE

Disposition Authority No. GS51-04

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
11	STUDENT ABSENCE REPORT ROSTERS Reports tracking absences in the total student population. May include but is not limited to the following: Rosters of Students with Excused Absences (by period), Rosters of Students with Un-excused Absences (by period), Rosters of Students with Excused Absences (daily), Rosters of Students with Un-excused Absences (daily).	OFM	3 years	1 year	
12	STUDENT ADMIT SLIPS	OFM	Retain for current school year	Destroy when obsolete or superseded	
13	STUDENT BUS/PICK-UP CHANGES	OFM	Retain for current school year	Destroy when obsolete or superseded	
14	STUDENT LATE ARRIVAL AND EARLY DEPARTURE LOGS	OFM	Retain for current school year	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

ATTENDANCE

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: BOARD OF DIRECTORS

Disposition Authority No. GS50-05A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	AGENDA REQUEST	OFM	1 year	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
2	AGENDAS	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
3	ANNUAL REPORTS ADOPTED BY THE BOARD May also include annual messages of chief executive officer.	OFM	PERMANENT as adopted - 1 copy archival - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist.
4	APPOINTMENTS OF COUNCIL MEMBERS, COMMISSIONERS, BOARD MEMBERS, DEPARTMENT HEADS, OR OTHER DISTRICT OFFICIALS	OPR	PERMANENT (in council, commission, or board minutes)	Destroy when obsolete or superseded	
5	AUDIO TAPE RECORDS OF OFFICIAL PROCEEDINGS Although this series cannot serve as the permanent record of proceedings, it may be used to satisfy court requirements for verbatim accounts of the process and intent behind approved ordinances and resolutions.	OPR	6 years – See remarks	Destroy when obsolete or superseded	Once transcribed and approved, the audio tape becomes a secondary copy which can be taped over or destroyed when obsolete or superseded.
6	BOARD MEMBER BRIEFS/PACKETS	OFM	1 year - Potential archival value - 1 copy only - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
7	COMMITTEE MINUTES/REPORTS	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
8	DISTRICT CHARTERS Official, adopted charter defining scope of the district 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	Contact your Regional Archivist before disposing of this record. 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.
9	GOALS & OBJECTIVES WORKING FILE	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

BOARD OF DIRECTORS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: BOARD OF DIRECTORS

Disposition Authority No. GS50-05A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
10	INDEXES TO MINUTES AND RESOLUTIONS ESSENTIAL RECORD - See remarks.	OFM	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist. 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.
11	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	Contact your Regional Archivist. 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	NOTICES OF PUBLIC MEETINGS	OFM	3 years	Destroy when obsolete or superseded	
13	OATHS OF OFFICE ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	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	PETITIONS TO THE BOARD	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
15	RECORDS OF PUBLIC HEARINGS Includes verbatim agenda, minutes, transcripts, speaker sign up, written testimony, and official notice. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist. 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	RESOLUTIONS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist. 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.

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David Owens

For the State Archivist: David Owens

BOARD OF DIRECTORS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: BUDGET

Disposition Authority No. GS51-02A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ADOPTED BUDGET (F-195) Includes: Budget Extension (F-200), and Estimate of Revenue (F-203).	OPR	File with permanent copy of Board minutes	Destroy when obsolete or superseded	
2	BUDGET FORECAST REPORTS	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	
3	BUDGET OFFICER'S BOARD REPORT	OPR	6 years	Destroy when obsolete or superseded	
4	BUDGET REVISION REQUESTS	OPR	6 years	Destroy when obsolete or superseded	
5	BUDGET STATUS REPORT FOR DEPARTMENT / BUILDING	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	
6	BUDGET WORK PAPERS AND PRELIMINARY DRAFTS	OFM	3 years or until completion of State Auditor's examination report	Until adoption of final budget	
7	YEAR-END FINANCIAL REPORT (F196)	OPR	PERMANENT - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: CURRICULUM/INSTRUCTION

Disposition Authority No. GS51-06A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ACCREDITATION REPORTS AND EVALUATION REPORTS Separate evaluations of all district reports subject to review.	OPR	Until superseded plus 6 years. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
2	CATEGORICAL PROGRAM FILES a. State categorical programs: student lists, test scores, inventory of equipment, legal reports, evaluations and assurances to be maintained for monitoring and auditing purposes. b. Federal categorical programs: student eligibility lists, comparability reports, pre- and post-test data, evaluations, inventory of equipment, parent advisory committee minutes.	OFM	3 years after completion of grant audit or retain for period required by grant or program – See remarks	Destroy when obsolete or superseded	Reference HANDBOOK FOR CATEGORICAL STATE AND FEDERAL PROGRAMS publish by OSPI. Records from this series which become involved in an audit or litigation before the end of the retention period specified by the granting agency must be retained at least until the audit or litigation is resolved.
3	COMMUNITY CHALLENGES OF INSTRUCTIONAL MATERIALS	OFM	5 years. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
4	COURSE ADDITIONS, DELETIONS, AND CHANGES	OFM	3 years	Destroy when obsolete or superseded	
5	CURRICULUM SUMMARIES AND GUIDES	OFM	PERMANENT. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
6	ESSENTIAL ACADEMIC LEARNING REQUIREMENTS/ STUDENT LEARNING OBJECTIVE (SLO) PROGRAM FILES a. A complete set of Student Learning Objectives for each basic subject. b. Community input data for development of Student Learning Objectives. c. Evaluation Data for each Student Learning Objective.	OFM	Until superseded. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
7	ESSENTIAL ACADEMIC LEARNING REQUIREMENTS/ STUDENT LEARNING OBJECTIVES (SLO) PROGRAM FILES RESULTS	OFM	Until compilation and issuance of test data	Retain until compilation and issuance of test data	
8	GRADUATION REQUIREMENTS STATEMENTS	OPR	PERMANENT. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: CURRICULUM/INSTRUCTION

Disposition Authority No. GS51-06A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
9	INDIVIDUAL STUDENT LEARNING OBJECTIVES REPORTS	OFM	Until completion of data and issuance of test data	Retain until completion of data and issuance of test data	
10	INSTRUCTIONAL MATERIALS SUBJECT FILE Evaluation data and recommendations on instructional materials which are accrued prior to Board adoption.	OFM	Retain until superseded by new adoption. Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
11	PARENT/GUARDIAN CURRICULUM WAIVERS	OPR	6 years	Destroy when obsolete or superseded	
12	PARENT/GUARDIAN PERMISSION SLIPS Includes internet and films. Does not include field trip permission slips – See Page #S-33, Item #24	OFM	Retain for current school year	Destroy when obsolete or superseded	
13	STUDENT ASSESSMENT AND PLACEMENT PROGRAM CASE FILES	OFM	1 year after screening	Destroy when obsolete or superseded	
14	STUDENT TESTING – AUTOMATED BACKUP DATA Tapes, disks, or punch cards containing data from various student testing exercises.	OFM	5 years	Destroy when obsolete or superseded	
15	STUDENT TESTING - AUTOMATED PROGRAM SOFTWARE AND SYSTEM DOCUMENTATION	OPR	1 year after superseded by new system	Destroy when obsolete or superseded	
16	STUDENT TESTING – GROUP REPORTS Summary of testing scores by class, grade, program, sex, ethnic group, building, or district.	OFM	5 years	Destroy when obsolete or superseded	
17	STUDENT TESTING – INDIVIDUAL STUDENT REPORT	OFM	2 years after graduation	Destroy when obsolete or superseded	
18	STUDENT TESTING – PRIMARY RECORD Response sheet completed by student.	OFM	90 days	None	

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ELECTRONIC INFORMATION – DATA AND INPUT DOCUMENTATION

Disposition Authority No. GS50-20B

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	DATABASE AND SPREADSHEET DATA (USER WORKING COPY) User copies of master files used to collect, retain, retrieve, update, transmit, issue, or present data or information.	OFM	Until obsolete or superseded - See remarks	Destroy when obsolete or superseded	Hard copy printouts are required to be made, filed, and retained according to records retention schedules or general records retention schedules approved by the Local Records Committee. If such records are routinely maintained on an electronic records storage system, they must also be retained according to records retention schedules or general records retention schedules approved by the Local Records Committee.
2	FINDING AIDS AND INDEXES (USER WORKING COPY) Includes lists, registers, cross-reference and other finding aid copies (on any medium) used to provide access to files.	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	
3	INPUT DOCUMENTS	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	
4	WORD PROCESSING FILES Electronically stored working files for the preparation, revision, and re-issuance of letters, reports, manuals, directives, and other records.	OFM	Retain each document in hard copy or electronic file as per approved records retention schedule - See remarks	Destroy when obsolete or superseded	Hard copy printouts are required to be made, filed, and retained according to records retention schedules or general records retention schedules approved by the Local Records Committee. If such records are routinely maintained on an electronic records storage system, they must also be retained according to records retention schedules or general records retention schedules approved by the Local Records Committee.

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

ELECTRONIC INFORMATION – DATA AND INPUT DOCUMENTATION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ELECTRONIC INFORMATION – ELECTRONIC MAIL

Disposition Authority No. GS50-20C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	INFORMATION WITH NO RETENTION VALUE Appointment calendar messages, information down-loaded from bulletin boards or web sites, information-only copies of documents which do not relate directly to the functional responsibility of the agency or office that receives them. These files should be deleted as soon as possible after the information has been received and examined.	OFM	Delete upon review	System file and backup - Destroy when obsolete or superseded	
2	PUBLIC RECORDS Official correspondence, original reports, original policy and procedures directives, official minutes or other documentation that facilitates action by agency officials and their successors, original messages related to legal issues, original messages related to audit issues, original messages documenting agency actions and responsibilities - See remarks.	OFM	File a print-out with the appropriate records series - then delete from electronic mail	System file and backup - Destroy when obsolete or superseded	Electronic mail is not a records storage system. Public record information should be retained on electronic mail only as long as it is being worked on or distributed. Upon completion it should be printed out and deleted from the electronic mail system. The printout should be filed and retained in the agency's records storage system by records series - not as electronic mail.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

ELECTRONIC INFORMATION – ELECTRONIC MAIL

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ELECTRONIC INFORMATION – SYSTEM DOCUMENTATION

Disposition Authority No. GS50-06A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
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	
2	ELECTRONIC INFORMATION SYSTEM AND SOFTWARE BACKUP DATA Tapes, discs, and media providing backup data which is revised and recreated in a regular cycle. ESSENTIAL RECORD - Backup should be stored off site.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	
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 - termination plus 2 years	Destroy when obsolete or superseded	Must be maintained in hard copy or on computer output microfilm (com) to satisfy audit requirements. Source document microfilming is not recommended for this purpose. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and 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 - termination plus 2 years	Destroy when obsolete or superseded	Must be maintained in hard copy or on computer output microfilm (com) to satisfy audit requirements. Source document microfilming is not recommended for this purpose.
5	ELECTRONIC INFORMATION SYSTEM OPERATIONAL DATA Summaries of throughput statistics, usage figures, work output measurements, and input edit listings.	OFM	1 year	Destroy when obsolete or superseded	
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	

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: ELECTRONIC INFORMATION – SYSTEM DOCUMENTATION

Disposition Authority No. GS50-06A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
7	ELECTRONIC INFORMATION SYSTEM PROGRAMMING AND IMPLEMENTATION DATA Operational and user instructions, specification and system acceptance criteria. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Fiscal/accounting systems - termination plus 3 years All other systems - termination plus 2 years	Destroy when obsolete or superseded	Must be maintained in hard copy or on computer output microfilm (com) to satisfy audit requirements. Source document microfilming is not recommended for this purpose. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R. E. Buholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

ELECTRONIC INFORMATION – SYSTEM DOCUMENTATION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: FACILITIES ADMINISTRATION

Disposition Authority No. GS51-07

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ARCHITECT / CONSULTANT ROSTER FOR CONTRACTS	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	
2	BOILER VESSEL REPORTS 1) Report of boiler inspection by custodian. 2) 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	
3	BUILDING AND SITE FILES Includes building specifications, engineering and architectural drawings.	OFM	Until disposal and/or sale of building and site – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
4	CAPITAL IMPROVEMENT PLANNING PROJECT FILE	OFM	Until completion of project – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
5	CAPITAL LEVY PLANNING FILES	OFM	Until completion of project	Destroy when obsolete or superseded	
6	CONSTRUCTION CONTRACT FILE Includes SPI building construction matching fund documentation.	OPR	Termination plus 6 years	Destroy when obsolete or superseded	
7	CONSTRUCTION LOG Chronological listing of the progress of construction projects.	OFM	Until completion and acceptance of project plus 6 years	Destroy when obsolete or superseded	
8	DEMOGRAPHIC AND ENROLLMENT PROJECTIONS	OFM	5 years – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
9	ENERGY USAGE MEASUREMENT REPORTS AND DATA	OFM	5 years	Destroy when obsolete or superseded	
10	ENVIRONMENTAL MONITORING REPORTS	OFM	PERMANENT – Potential archival value – See remarks	3 years	Contact your Regional Archivist before disposing of this record.
11	FACILITY RENTAL / USE SCHEDULE	OFM	1 year	Destroy when obsolete or superseded	
12	FACILITY USE AUTHORIZATION / PERMIT	OPR	6 years	Destroy when obsolete or superseded	
13	FIRE EXTINGUISHER INSPECTION TAGS Prepared by fire departments or private firms.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R-E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: FACILITIES ADMINISTRATION

Disposition Authority No. GS51-07

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
14	KEY INVENTORY Documentation of facility keys assigned to agency personnel. ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
15	LONG RANGE FACILITIES PLAN	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
16	MAINTENANCE HISTORY DOCUMENTATION Maintenance history for each building which may include: Maintenance performed, work orders, purchase orders, copies of state and/or insurance company's inspection reports.	OFM	Life of building	Destroy when obsolete or superseded	
17	MAJOR CONSTRUCTION PROJECT FILES Construction of new buildings, major renovation and additions. Includes permits.	OPR	Termination of ownership plus 6 years – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
18	MINOR CONSTRUCTION PROJECT FILES Roofing, paving, minor renovation and repairs. Includes permits.	OPR	Completion of project plus 6 years	Until completion of project	
19	OPERATING MANUALS Prepared by contractors for use of the agency in maintaining equipment installed in buildings ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Disposition or sale of facility or equipment plus 10 years	Destroy when obsolete or superseded	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 State Archives standards.
20	OPERATING PERMITS Boilers and elevators.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	
21	PROPERTY PURCHASE PROPOSALS (INACTIVE) Proposal for the purchase of district's real property made by other parties and proposals made by district to acquire real property.	OFM	3 years	Destroy when obsolete or superseded	
22	PUBLIC BIDS Includes: Request for Bid, Public Notice, and Bid Award	OPR	Included in Board of Directors Resolution	6 years	

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

FACILITIES ADMINISTRATION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: FACILITIES ADMINISTRATION

Disposition Authority No. GS51-07

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
23	SCHOOL BOARD RESOLUTION REGARDING BOND ISSUE	OPR	Retained by clerk of Board of Directors – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
24	SMALL WORKS ARCHITECT / CONSULTANT ROSTER FOR CONTRACTS	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	
25	STATE ENVIRONMENTAL POLICY ACT (SEPA) ENVIRONMENTAL IMPACT STATEMENTS Submitted to and accepted by the agency as part of its building code enforcement duties. ESSENTIAL RECORD - Needs security microfilm backup - See remarks .	OPR	Life of approved activity - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record. 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 State Archives standards.
26	STATE ENVIRONMENTAL POLICY ACT (SEPA) ENVIRONMENTAL IMPACT STATEMENT WORK FILES	OFM	End of planning period	Destroy when obsolete or superseded	
27	WORK ORDERS	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R-E Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

FACILITIES ADMINISTRATION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: FOOD SERVICES

Disposition Authority No. GS51-08

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	CATERING REQUESTS Requests for use of kitchen and supplying of food and labor.	OFM	3 years after completion of State Auditor's examination report	Destroy when obsolete or superseded	
2	FOOD HANDLER'S PERMIT Permit renewed every two years.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	
3	FOOD SERVICE ORDERS For supplies needed to operate school lunch program.	OFM	3 years after completion of State Auditor's examination report	Destroy when obsolete or superseded	
4	FREE OR REDUCED PRICE MEAL APPLICATION Applications for reduced-price or free lunch in compliance with National School Lunch Act.	OPR	6 years	Destroy when obsolete or superseded	Federal audit requirements. Security of confidential information must be protected.
5	MEAL AND MILK COUNT REPORTS AND DOCUMENTATION Record of daily meals and milk served. Completed by kitchen and/or lunch room servers.	OFM	3 years after completion of State Auditor's examination report	Destroy when obsolete or superseded	
6	MEAL TICKET LOG Listing of meal tickets issued, including number, date, name of purchaser, and/or recipient and amount paid.	OFM	3 years after completion of State Auditor's examination report	Destroy when obsolete or superseded	
7	MEAL TICKETS Prepaid meal tickets.	OFM	After completion of State Auditor's examination report	Destroy when obsolete or superseded	
8	MONTHLY MEAL COUNT REIMBURSEMENT REPORT	OPR	6 years	Destroy when obsolete or superseded	
9	SCHOOL BREAKFAST PROGRAM PLAN Includes plan and backup documentation submitted to SPI for program approval.	OPR	Termination of plan plus 6 years	Destroy when obsolete or superseded	
10	SITE HEALTH PERMIT Annual renewal for kitchen.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	
11	STOCK CONTROL RECORDS Listing of food items, supplies, and commodities used for manual count of inventory on hand.	OFM	3 years after completion of State Auditor's examination report	Destroy when obsolete or superseded	
12	STOCK INVENTORY REPORT SUMMARY Prepared from stock control records and food service orders. Lists quantities on hand, received, used and unit prices.	OFM	3 years after completion of State Auditor's examination report	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Binkley

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

FOOD SERVICES

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: GRANTS MANAGEMENT AND PROGRAMS

Disposition Authority No. GS50-03C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ANNUAL FINANCIAL STATUS REPORTS Annual report submitted for continuing grants containing summaries and break downs of expenditures for the past year.	OFM	3 years after completion of grant audit or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102.
2	FINAL EXPENDITURE REPORT End of a project report accounting for the expenditure of grant funds submitted for non-continuing grants.	OFM	3 years after completion of grant audit or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102.
3	FINANCIAL SUPPORT DOCUMENTS (CONTINUING GRANTS) Working papers, such as summaries, spread sheets and other data reflecting the expenditures of grant fund.	OFM	3 years after completion of grant audit or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102.
4	FINANCIAL SUPPORT DOCUMENTS (NON-CONTINUING GRANTS) Working papers, such as summaries, spreadsheets, and other data reflecting the expenditure of grant funds.	OFM	3 years after completion of audit or as per requirements of grant program - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102.
5	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 after completion of grant audit or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102.
6	GRANT APPLICATIONS (APPROVED) Includes narrative explanation of the nature and purpose of the proposed project, amount of funds requested, matching funds, in-kind contribution and plan of work.	OPR	3 years after completion of grant audit or retain for period required by grant or program - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102.
7	GRANT APPLICATIONS (NOT APPROVED)	OFM	1 year	Destroy when obsolete or superseded	
8	GRANT PROJECT WARRANTS, CHECKS, AND VOUCHERS	OPR	6 years or until satisfaction of grant audit requirements, whichever is longer	Destroy when obsolete or superseded	
9	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 after completion of audit or as per requirements of grant program - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102. Contact your Regional Archivist before disposing of this record.

Approved by the Local Records Committee – April 1999

R.E. Buholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: GRANTS MANAGEMENT AND PROGRAMS

Disposition Authority No. GS50-03C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
10	STATISTICAL DOCUMENTATION	OFM	3 years after State Auditor's examination report on grant expenditures - Potential archival value - See remarks	Destroy when obsolete or superseded	Federal grants reference Federal Register OMB A102. Contact your Regional Archivist before disposing of this record.
11	WARRANT, CHECK, OR VOUCHER REGISTERS Numerical listings 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	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

GRANTS MANAGEMENT AND PROGRAMS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: HAZARDOUS MATERIALS ADMINISTRATION

Disposition Authority No. GS50-19

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	EMPLOYEE ASBESTOS PHYSICAL EXAMINATION ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	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	GENERATOR ANNUAL DANGEROUS WASTE REPORT (To Department of Ecology) summary of hazardous waste removal. ESSENTIAL RECORD- Needs security backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	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	HAZARDOUS MATERIALS ACCIDENT/INCIDENT REPORT Description of accident and clean-up. Includes information on personal exposure. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	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.
4	HAZARDOUS MATERIALS CERTIFICATE OF DESTRUCTION ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	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.
5	HAZARDOUS MATERIALS EMPLOYEE RIGHT TO KNOW IMPLEMENTATION PLAN ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	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.
6	HAZARDOUS MATERIALS INSPECTION AND TEST REPORTS ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OFM	50 years	Destroy when obsolete or superseded	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.
7	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	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.

Approved by the Local Records Committee – April 1999

R.E. Binkley

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

HAZARDOUS MATERIALS ADMINISTRATION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: HAZARDOUS MATERIALS ADMINISTRATION

Disposition Authority No. GS50-19

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
8	HAZARDOUS MATERIALS MANAGEMENT PLAN ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	50 years	Destroy when obsolete or superseded	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.
9	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	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	HAZARDOUS WASTE 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	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.
11	MATERIALS SAFETY DATA SHEET (MSDS) ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	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

Approved by the Local Records Committee – April 1999

R.E. Bills

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

HAZARDOUS MATERIALS ADMINISTRATION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: HEALTH SERVICES

Disposition Authority No. GS51-09

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	APPLICATION FOR HOME / HOSPITAL TUTORING	OPR	6 years	Destroy when obsolete or superseded	
2	CERTIFICATE OF IMMUNIZATION STATUS (CIS) Dept. of Health Form No. 348-013.	OFM	Retain until termination of enrollment.	Destroy when obsolete or superseded	
3	CHILD ABUSE REPORTS Reports compiled by district personnel regarding students who may be victims of abuse. Submitted to DSHS Child Protective Services.	OPR	6 years	Destroy when obsolete or superseded	
4	COMMUNICABLE DISEASE REPORT Includes data collected from schools and summary report.	OFM	Retain until summary report is submitted to local Health Department	Destroy when obsolete or superseded	
5	HEALTH ROOM REGISTRY Log of students reporting to health office because of illness/injury.	OFM	8 years after last entry – See remarks	Destroy when obsolete or superseded	Reference RCW 4.16.350 and RCW 28A.210.260.
6	HEALTH SCREENING RESULTS Includes the following tests: Scoliosis (mandatory), Vision (mandatory), Hearing (mandatory), and Dental (optional).	OFM	Retain until data is transferred to Student Health Card or Folder	Destroy when obsolete or superseded	
7	MEDICATION ADMINISTRATION CASE FILES Includes physician/parent/guardian authorization and account of number and dosages administered.	OPR	8 years after last dose – See remarks	Destroy when obsolete or superseded	Reference RCW 4.16.350 and RCW 28A.210.260.
8	MEDICATION ADMINISTRATION DAILY LOG A chronological listing of the dosages administered.	OPR	8 years after last entry – See remarks	Destroy when obsolete or superseded	Reference RCW 4.16.350 and RCW 28A.210.260.
9	STUDENT HEALTH CARD OR FOLDER May include but is not limited to screening results, data recorded from information submitted by physician/parent/guardian, and record of notification to parent/guardian.	OFM	2 years after graduation or withdrawal	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

HEALTH SERVICES

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: HISTORICAL MATERIALS

Disposition Authority No. GS51-06B


THE FOLLOWING TYPES OF MATERIALS ARE DESIGNATED AS ARCHIVAL AND SHOULD BE PRESERVED FOR HISTORICAL USE BY SCHOOL DISTRICTS OR TRANSFERRED TO THE NEAREST STATE ARCHIVES REGIONAL BRANCH:

The District should establish a policy providing for the regular transfer of the following items to the nearest regional branch of the State Archives or permanent preservation by the District itself.

1. ANNUAL HIGH SCHOOL REPORT FOR STANDARDS AND ACCREDITATION
2. COURSE DESCRIPTION CATALOG
3. DISTRICT PUBLICATIONS Including brochures, posters, films, videos, web sites, exhibits, etc. (Preserve 1 copy only)
4. GRADUATING CLASS HISTORY FILE Containing such material as: Graduation list, commencement and baccalaureate services programs, final grade point, cumulative class rank, diploma order list, awards list, honor roll, senior activities and other class items for class reunions or historical purposes.
5. REPORT OF EVALUATION OF ACCREDITATION
6. SCHOOL BULLETINS AND NEWSPAPERS
7. SCHOOL HISTORY MATERIAL Including dedication programs, evaluations, letter awards, photographs, scrapbooks, banners, trophies, etc.
8. STATEMENTS OF GRADUATION REQUIREMENTS
9. STUDENT HANDBOOK
10. YEAR BOOK / ANNUAL

SUPERSEDED

Approved by the Local Records Committee – April 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

HISTORICAL MATERIALS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: HOME-BASED INSTRUCTION

Disposition Authority No. GS51-09A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	LIST OF SERVICES PROVIDED BY THE SCHOOL DISTRICT	OPR	6 years	Destroy when obsolete or superseded	
2	LIST OF STUDENTS	OPR	6 years	Destroy when obsolete or superseded	
3	NOTICE OF TRANSFER OF HOME-BASED STUDENT TO DISTRICT Documents the transfer of home-based students back to district schools.	OFM	File in Student Cumulative Record	Destroy when obsolete or superseded	
4	PARENT / GUARDIAN CURRICULUM WAIVERS	OPR	6 years	Destroy when obsolete or superseded	
5	PARENT / GUARDIAN DECLARATION OF INTENT Annual statement of intent by parent / guardian to provide full-time or part-time home schooling for an individual student.	OPR	3 years	Destroy when obsolete or superseded	
6	PLACEMENT / EVALUATION TEST RESULTS FOR STUDENTS ENTERING DISTRICT FROM HOME-BASED INSTRUCTION	OFM	2 years after graduation or withdrawal	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

HOME-BASED INSTRUCTION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: INSURANCE/RISK MANAGEMENT/SAFETY

Disposition Authority No. GS50-06C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ACCIDENT CLAIM LOGS, DEPT. OF LABOR AND INDUSTRIES	OFM	3 years	Destroy when obsolete or superseded	
2	ACCIDENT REPORTS - EMPLOYEE - INSURED BY AGENCY OR NOT REPORTABLE TO LABOR AND INDUSTRIES	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	
3	ACCIDENT REPORTS - EMPLOYEES - INSURED THROUGH LABOR & INDUSTRIES Made out by employee, supervisor and/or doctor. Includes in-house reports and other reports, which are submitted to other agencies as necessary.	OFM	Department of Labor and Industries - Settlement plus 6 years	Settlement plus 2 years	
4	CERTIFICATES OF INSURANCE	OPR	6 years	Destroy when obsolete or superseded	
5	CERTIFICATION OF EMPLOYER AS SELF-INSURER	OFM	Department of Labor and Industries - Termination plus 6 years	Until certification withdrawn or surrendered.	
6	COMPENSATION QUARTERLY REPORTS	OFM	Department of Labor and Industries - 6 years	3 years	
7	DISASTER/EMERGENCY MANAGEMENT PLAN ESSENTIAL RECORD - needs security microfilm backup - See remarks.	OPR	PERMANENT	Destroy when obsolete or superseded	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.
8	FACILITY INSPECTION HISTORY RECORDS Cumulative record showing inspection citations, corrections, and other information relating to the continuing safety of each agency facility.	OFM	Disposition or sale of facility plus 10 years	Destroy when obsolete or superseded	
9	FIDELITY AND SURETY COVERAGE BONDS	OPR	Termination of policy plus 6 years	Destroy when obsolete or superseded	
10	FIRE & OTHER EMERGENCY DRILL REPORTS	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

INSURANCE/RISK MANAGEMENT/SAFETY

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: INSURANCE/RISK MANAGEMENT/SAFETY

Disposition Authority No. GS50-06C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
11	FIRE ALARM APPLICATION	OPR	Termination plus 6 years	Destroy when obsolete or superseded	
12	FIRE INSPECTION REPORT	OPR	Termination of policy plus 6 years	Destroy when obsolete or superseded	
13	HOLD HARMLESS AGREEMENTS	OPR	Termination plus 6 years	Destroy when obsolete or superseded	
14	INCIDENT REPORTS AND ACCIDENT CLAIMS FOR DAMAGES FILED AGAINST THE AGENCY BY OTHER PARTIES, AND BY THE AGENCY AGAINST OTHER PARTIES Includes vehicle accidents.	OPR	Conclusion of incident plus 6 years	Destroy when obsolete or superseded	
15	INSURANCE AUDITS, SURVEYS, REPORTS To document and analyze the coverage, premium costs, and self-insurance costs.	OFM	4 years	Destroy when obsolete or superseded	
16	INSURANCE POLICIES PURCHASED Includes accident, 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	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
17	INSURANCE WAIVERS	OPR	6 years	Destroy when obsolete or superseded	
18	INSURANCE, SAFETY & FIRE INSPECTION REPORTS	OFM	Termination of policy plus 6 years	Destroy when obsolete or superseded	
19	MONTHLY STATEMENT OF BENEFITS PAID	OPR	6 years	Destroy when obsolete or superseded	
20	NOTIFICATION OF PENALTY ASSESSMENT	OPR	6 years	Destroy when obsolete or superseded	
21	OCCUPATIONAL INJURIES AND ILLNESSES U.S. BUREAU OF LABOR STATISTICS LOG AND SUMMARY	OFM	5 years	Destroy when obsolete or superseded	

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

INSURANCE/RISK MANAGEMENT/SAFETY

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: INSURANCE/RISK MANAGEMENT/SAFETY

Disposition Authority No. GS50-06C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
22	REFERENCE AND INFORMATION MATERIALS RECEIVED FROM SAFETY AGENCIES Bulletins, pamphlets, notices.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	
23	REPORTS OR STATEMENTS OF CLAIMS COSTS Compilations of costs of processing claims against self-insured liabilities.	OFM	4 years	Destroy when obsolete or superseded	
24	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	
25	SAFETY INSPECTION, STATE NOTICE AND CITATION	OPR	6 years	Destroy when obsolete or superseded	
26	WORKER'S COMPENSATION AND EMPLOYEE LIABILITY CLAIMS	OFM	Department of Labor and Industries - PERMANENT - See remarks	Last payment plus completion of State Auditor's examination report.	Note: For self-insured entities, the primary file copy will be maintained at the self-insured's office for 6 years from date of closure.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Binkley

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

INSURANCE/RISK MANAGEMENT/SAFETY

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: INTERNAL AUDIT

Disposition Authority No. GS50-03F

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	AUDIT SUBJECT/REFERENCE FILES Cumulative data on departments and audit issues.	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	
2	FISCAL AND PERFORMANCE AUDIT REPORTS Final report of audit findings.	OPR	6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
3	TECHNICAL REFERENCE MATERIALS Audit related publications and documents gathered for reference.	OFM	Until obsolete or superseded	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: LAND OWNERSHIP & ACCESS RIGHTS

Disposition Authority No. GS55-05A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	APPRAISALS Statement of land values, provided by independent appraisers under contract to the agency.	OPR	Disposition of land plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
2	DEEDS/TITLES Legal documents of ownership.	OPR	County auditor or recorder - PERMANENT	Sale or disposal of land plus 10 years - See remarks	Additional copies may be disposed of when obsolete or superseded.
3	EASEMENTS Granted by and to agency.	OPR	County auditor or recorder - PERMANENT	Reassignment or vacation of easement plus 10 years - See remarks	Additional copies may be disposed of when obsolete or superseded.
4	ENCROACHMENTS Documentation of conflicts on land or water rights and obligations. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Disposition of land plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	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 State Archives standards.
5	FRANCHISES Agreements allowing activities within specified jurisdictions. ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Termination plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	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 State Archives standards.
6	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	Contact your Regional Archivist before disposing of this record. 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 State Archives standards.
7	LEASES Official documentation of leases for property leased by and from other parties and agency property leased to the public.	OPR	Termination plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
8	REAL PROPERTY VACATIONS Documentation of the process of relinquishing road, street, alley, and other rights of way owned by the agency - ESSENTIAL RECORD - Needs security microfilm backup - See remarks.	OPR	Approval by council, commission, or board plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	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 State Archives standards.

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David Owens

For the State Archivist: David Owens

LAND OWNERSHIP & ACCESS RIGHTS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: LEARNING RESOURCE CENTERS

Disposition Authority No. GS51-06C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	CATALOG ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
2	LEARNING RESOURCE CENTER CIRCULATION DOCUMENTATION	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	
3	LEARNING RESOURCE CENTER SHELF LIST / INVENTORIES AND TEXTBOOK SHELF LIST	OFM	Until superseded plus completion of State Auditor's examination report	Destroy when obsolete or superseded	
4	LOSS REPORT	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David Owens

For the State Archivist: David Owens

LEARNING RESOURCE CENTERS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: LEGAL COUNSEL

Disposition Authority No. GS53-02

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ATTORNEY GENERAL OPINIONS	OFM	Attorney General - PERMANENT	Destroy when obsolete or superseded.	
2	CRIMINAL/CITATION PROSECUTION CASE FILES	OFM	Case closed plus 10 years	Destroy when obsolete or superseded	
3	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	Contact your Regional Archivist.
4	LITIGATION 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	Case closed plus 10 years - Potential archival value - See remarks	Destroy when obsolete or superseded	The official court files 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.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R-E Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

LEGAL COUNSEL

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: MAIL SERVICES

Disposition Authority No. GS50-06D

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	BULK MAILING PERMIT	OPR	6 years	Destroy when obsolete or superseded	
2	CERTIFIED AND REGISTERED MAIL LOG	OFM	3 years	Destroy when obsolete or superseded	
3	CERTIFIED MAIL RETURN RECEIPT	OFM	3 years	Destroy when obsolete or superseded	
4	POSTAGE EXPENDITURE REPORT	OFM	3 years	Destroy when obsolete or superseded	
5	POSTAGE METER LICENSE	OPR	Until obsolete or superseded plus 6 years	Destroy when obsolete or superseded	
6	POSTAGE METER LOG	OFM	3 years	Destroy when obsolete or superseded	
7	SENDERS STATEMENT AND CERTIFICATION OF BULK MAILING	OFM	3 years	Post office has other copies	
8	UPS REGISTER	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PAYROLL

Disposition Authority No. GS50-03E

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	AUTHORIZATION FOR PAYROLL DEDUCTIONS	OPR	Termination of authorization plus 6 years	Destroy when obsolete or superseded	
2	BENEFIT DETAIL REPORTS	OFM	3 years	Destroy when obsolete or superseded	
3	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	
4	DAILY, WEEKLY, OR MONTHLY TIME ACCUMULATION REPORTS (TIME CARDS) May be used as retirement verification. ESSENTIAL RECORDS – See remarks.	OFM	If used for retirement verification – 60 years If NOT used for retirement verification – 3 years See remarks	Destroy when obsolete or superseded	Retain for 60 years if employee pay histories or payroll registers are not used for retirement verification.
5	DIRECT PAYROLL DEPOSIT AUTHORIZATION	OFM	Until transferred to cancellation file	Destroy when obsolete or superseded	
6	DIRECT PAYROLL DEPOSIT AUTHORIZATION CANCELLATION	OFM	4 years	Destroy when obsolete or superseded	
7	DIRECT PAYROLL DEPOSIT ENROLLEES DETAIL DATA	OFM	1 year	Destroy when obsolete or superseded	
8	DIRECT PAYROLL DEPOSIT HASH SHEET	OFM	1 year	Destroy when obsolete or superseded	
9	DIRECT PAYROLL DEPOSIT PRE-NOTE DATA	OFM	1 year	Destroy when obsolete or superseded	
10	DIRECT PAYROLL DEPOSIT TRANSMITTAL LISTINGS	OFM	3 years	Destroy when obsolete or superseded	
11	DISABILITY, HEALTH, AND WELFARE CLAIMS	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	
12	EMPLOYEE EARNINGS QUARTERLY REPORTS	OFM	4 years	Destroy when obsolete or superseded	
13	EMPLOYEES WITHHOLDING EXEMPTION CERTIFICATES (W-4)	OFM	4 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Binkley

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PAYROLL

Disposition Authority No. GS50-03E

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
14	EMPLOYER'S COPIES OF FEDERAL WITHHOLDING TAX STATEMENT (W-2)	OFM	4 years	Destroy when obsolete or superseded	
15	INDIVIDUAL EMPLOYEE PAY HISTORY May be used for verification of eligibility for retirement benefits. ESSENTIAL RECORD – Needs security backup – See remarks.	OPR	If used for retirement verification – 60 years If NOT used for retirement verification – 3 years See remarks	Destroy when obsolete or superseded	Either the individual employee pay history or the payroll register must be kept for long term verification of retirement eligibility. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
16	LABOR AND INDUSTRIES REPORT ON PAYROLL	OFM	3 years	Destroy when obsolete or superseded	
17	LEAVE BUY-BACK ELECTION FORMS	OPR	6 years	Destroy when obsolete or superseded	
18	LEAVE SHARING AUTHORIZATION	OPR	6 years	Destroy when obsolete or superseded	
19	LISTINGS OF PAYROLL DEDUCTIONS Includes medical insurance.	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	
20	MEDICAL INSURANCE REPORTS	OFM	3 years	Destroy when obsolete or superseded	
21	OLD AGE SECURITY INSURANCE (OASI) REPORTS	OFM	3 years	Destroy when obsolete or superseded	
22	PAYROLL REGISTER May be used for verification of eligibility for retirement benefits. ESSENTIAL RECORD – Needs security backup – See remarks.	OPR	If used for retirement verification – 60 years If NOT used for retirement verification – 3 years See remarks	Destroy when obsolete or superseded	Either the individual employee pay history or the payroll register must be kept for long term verification of retirement eligibility. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
23	RECORDS OF ATTACHMENTS OR GARNISHMENTS OF SALARIES OR WAGES	OPR	Satisfaction plus 6 years	Destroy when obsolete or superseded	
24	STATE EMPLOYEES RETIREMENT TRANSMITTAL	OFM	3 years	Destroy when obsolete or superseded	
25	SUPPORTING DOCUMENTS AND REPORTS Documentation of status of and adjustments to payroll accounts.	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PERSONNEL (HUMAN RESOURCES) – AFFIRMATIVE ACTION

Disposition Authority No. GS50-04C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
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	
2	AFFIRMATIVE ACTION FORECASTS	OFM	2 years	Destroy when obsolete or superseded	
3	AFFIRMATIVE ACTION PLANS ESSENTIAL RECORD - Needs security backup - See remarks	OPR	Until superseded plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
4	EQUAL EMPLOYMENT OPPORTUNITY COMPLAINTS AND CONCILIATIONS	OPR	Resolution plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
5	EQUAL EMPLOYMENT OPPORTUNITY REPORTS	OFM	2 years	Destroy when obsolete or superseded	
6	STUDIES AND REPORTS	OFM	5 years - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

PERSONNEL (HUMAN RESOURCES) – AFFIRMATIVE ACTION

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PERSONNEL (HUMAN RESOURCES) – BENEFITS

Disposition Authority No. GS50-04D

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	BENEFITS STUDIES AND SURVEYS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	
2	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	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
3	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	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
4	MONTHLY STATEMENT OF BENEFITS PAID	OPR	6 years	Destroy when obsolete or superseded	
5	UNEMPLOYMENT INSURANCE CLAIMS OF INDIVIDUAL EMPLOYEES	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buehler

For the Attorney General: Brian Buchholz

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For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

PERSONNEL (HUMAN RESOURCES) – BENEFITS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PERSONNEL (HUMAN RESOURCES) – EMPLOYEE RELATIONS

Disposition Authority No. GS50-04E

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	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	Contact your Regional Archivist before disposing of this record. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
2	GRIEVANCES AND APPEALS	OPR	Resolution plus 6 years	Destroy when obsolete or superseded	
3	UNION CONTRACT AND AGREEMENT NEGOTIATIONS FILES	OFM	Until approval of negotiated agreement - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
4	UNION ORGANIZATION LISTS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PERSONNEL (HUMAN RESOURCES) – GENERAL

Disposition Authority No. GS50-04B

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	APPLICATION FOR EMPLOYMENT WHEN APPLICANT IS NOT HIRED	OFM	3 years	Destroy when obsolete or superseded	
2	CUMULATIVE LEAVE RECORD	OFM	3 years	Destroy when obsolete or superseded	
3	EMPLOYEE & VOLUNTEER FINGERPRINT PROCESSING LIST Listings of newly hired employees fingerprinted for criminal background checks.	OPR	6 years	Destroy when obsolete or superseded	
4	EMPLOYEE CONTRACTS – FINAL Includes riders issued.	OPR	6 years	Destroy when obsolete or superseded	
5	EMPLOYEE CONTRACTS – SUPERSEDED Contracts superseded within fiscal year.	OFM	3 years	Destroy when obsolete or superseded	
6	EMPLOYEE DIRECTORY	OFM	Until obsolete or superseded – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
7	EMPLOYEE DISCIPLINARY AND PROBATION DOCUMENTS	OPR	6 years after completion of probation or disciplinary action	Destroy when obsolete or superseded	
8	EMPLOYEE HISTORY This record may be kept as part of item #14. Gives details on employee application, start of employment, promotion and demotion, evaluations, raises, investigations, retirement or disability resulting in employment termination, and evaluation of applications of recognition of non-college credit courses. ESSENTIAL RECORD - Needs security backup - See remarks .	OFM	Termination plus 6 years	Destroy when obsolete or superseded	May be kept as a permanent record (if considered necessary) instead of keeping the entire file. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
9	EMPLOYMENT INTERVIEW EVALUATION FILES Includes test results.	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

PERSONNEL (HUMAN RESOURCES) – GENERAL

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PERSONNEL (HUMAN RESOURCES) – GENERAL

Disposition Authority No. GS50-04B

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
10	EMPLOYMENT REQUISITION / PERSONNEL ACTION REQUEST May contain position specifications, needs analysis, and authorization signatures.	OFM	3 years	Destroy when obsolete or superseded	
11	HBV AND HIV EXPOSURE REPORTS AND WAIVERS ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Termination of employment plus 30 years	Destroy when obsolete or superseded	Reference 29 CFR 1910.1020. This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
12	JOB ANNOUNCEMENTS OR POSTINGS	OFM	3 years	Destroy when obsolete or superseded	
13	JOB DESCRIPTIONS Duties and qualifications necessary for each job.	OFM	Until obsolete or superseded plus 6 years	Destroy when obsolete or superseded	
14	PERSONNEL FILE May include application for employment when applicant is hired; identification, criminal background checks; oaths of officials elected and appointed; bonds of officials elected and appointed; evaluation reports on job performance; investigation reports; records of demotion and promotion; citations; reprimands; letters of recommendation; personal history cards. ESSENTIAL RECORD – Needs security backup – See remarks.	OFM	Termination plus 6 years	Destroy when obsolete or superseded	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.
15	POSITION CLASSIFICATION STUDIES Details on specific role and position of each job title, duties, obligations, etc.	OFM	Until obsolete or superseded plus 6 years	Destroy when obsolete or superseded	
16	REQUESTS FOR LEAVE	OFM	3 years	Destroy when obsolete or superseded	
17	VOLUNTEER FILES Document work history of individual volunteers as well as the agency's fulfillment of its responsibilities for each volunteer. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Termination of volunteer employment plus 6 years	Destroy when obsolete or superseded	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buehler

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PERSONNEL (HUMAN RESOURCES) – TRAINING & STAFF DEVELOPMENT

Disposition Authority No. GS50-04G

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	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.	OPR	6 years after termination of employment	Destroy when obsolete or superseded	
2	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	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

PERSONNEL (HUMAN RESOURCES) – TRAINING & STAFF DEVELOPMENT

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PUBLIC INFORMATION/RELATIONS

Disposition Authority No. GS50-06F

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	BIOGRAPHICAL FILES	OFM	Until obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
2	HISTORICAL FILES	OFM	Until obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
3	INFORMATIONAL REPORTS COMPILED FOR AGENCY USE	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
4	MASTER FILE OF AGENCY PUBLICATIONS	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
5	NEWSPAPER CLIPPINGS	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
6	PHOTOGRAPHS, AUDIO/VISUAL MATERIAL Photographic negatives may be held at Regional Archives for permanent preservation and security backup - See remarks.	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record or to discuss transfer of negatives for permanent preservation and security backup.
7	PRESS RELEASES	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
8	SCRAPBOOKS AND ALBUMS	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
9	SPEECHES	OFM	Agency option - Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Binkley

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PURCHASING – CENTRAL STORES

Disposition Authority No. GS50-08B

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	EQUIPMENT/VEHICLE PARTS ORDERS	OFM	3 years	Destroy when obsolete or superseded	
2	INVENTORY OF MATERIALS/EQUIPMENT, CHANGES AND TRANSFERS	OFM	3 years	Destroy when obsolete or superseded	
3	INVENTORY/YEAR-END REPORT	OFM	3 years	Destroy when obsolete or superseded	
4	MATERIALS DISBURSEMENT TICKETS	OFM	3 years	Destroy when obsolete or superseded	
5	MATERIALS ORDERS/REQUISITIONS	OFM	3 years	Destroy when obsolete or superseded	
6	MATERIALS RECEIPTS	OFM	3 years	Destroy when obsolete or superseded	
7	MATERIALS RECEIVING AND DISBURSEMENT REPORTS	OFM	3 years	Destroy when obsolete or superseded	
8	PACKING SLIPS	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

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For the State Auditor: Cliff Whipple

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For the State Archivist: David Owens

PURCHASING – CENTRAL STORES

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PURCHASING – PROCUREMENT

Disposition Authority No. GS50-08A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
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 and the chosen bid or proposal.	OPR	6 years after completion of purchase or fulfillment of contract	Destroy when obsolete or superseded	
2	CONSULTANT AND CONTRACTOR ROSTERS	OFM	Until superseded plus 6 years	Destroy when obsolete or superseded	
3	DAMAGE AND LOSS CLAIMS	OFM	Until completion of State Auditor's examination, plus 6 years if there is a monetary settlement	Destroy when obsolete or superseded	
4	DEBIT/CREDIT CHARGES	OFM	3 years	Destroy when obsolete or superseded	
5	DELIVERY RECEIPT-INTERNAL	OFM	3 years	Destroy when obsolete or superseded	
6	PRICE CHECKS AND INFORMAL QUOTATIONS	OFM	3 years	Destroy when obsolete or superseded	
7	PURCHASE ORDER, REQUISITION AND BID LOGS OR LISTING Listing of purchase order, requisitions and/or bids in numerical order, including date, item, amount, department, and vendor.	OFM	6 years	Destroy when obsolete or superseded	
8	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	
9	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	
10	REQUISITIONS Official statement documenting the purchase of commodities, goods, or services subject to bid.	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

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David M. Owens

For the State Archivist: David Owens

PURCHASING - PROCUREMENT

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PURCHASING – PROCUREMENT

Disposition Authority No. GS50-08A

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
11	UNSUCCESSFUL BIDS AND PROPOSALS	OFM	2 years	Destroy when obsolete or superseded	
12	WITHDRAWAL/CANCELLATION/CHANGE OF PURCHASE ORDERS	OPR	6 years	Destroy when obsolete or superseded	
13	WOMEN AND MINORITY OWNED BUSINESS ENTERPRISE (WMBE) VENDOR COMPLIANCE REPORTS	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

PURCHASING - PROCUREMENT

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: PURCHASING – SURPLUS PROPERTY

Disposition Authority No. GS50-08C

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ADVANCE NOTIFICATIONS OF AUCTION	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	
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 - Attached to resolution or ordinance	Destroy when obsolete or superseded	
3	AUCTION TERMS AND CONDITIONS AGREEMENTS	OPR	Completion of auction plus 6 years	Destroy when obsolete or superseded	
4	BILL OF SALE	OPR	6 years	Destroy when obsolete or superseded	
5	COOPERATIVE SURPLUS PROPERTY AUCTION OR SALES AGREEMENT Agreements established with other agencies disposing of surplus property.	OPR	Termination plus 6 years	Destroy when obsolete or superseded	
6	SURPLUS PROPERTY INVENTORY	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

PURCHASING – SURPLUS PROPERTY

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: RECORDS MANAGEMENT

Disposition Authority No. GS50-09

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	GENERAL RECORDS RETENTION SCHEDULE AND DESTRUCTION AUTHORIZATION Records retention schedule issued by the Local Records Committee that provides all agencies with continuing authorization for disposition of commonly held records.	OFM	Local Records Committee - PERMANENT	Destroy when obsolete or superseded	
2	INTERNAL RECORDS RETENTION SCHEDULES 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	
3	PUBLIC DISCLOSURE REQUEST Formal request submitted by citizen for access to agency records.	OPR	6 years	Destroy when obsolete or superseded	
4	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	
5	PUBLIC RECORDS DESTRUCTION LOG	OFM	PERMANENT	Destroy when obsolete or superseded	
6	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	6 years after superseded or 6 years after disposition of last records series listed on schedule	Destroy when obsolete or superseded	
7	RECORDS CENTER TRANSMITTALS, INVENTORIES, AND INDEXES ESSENTIAL RECORD - Needs security backup - See remarks.	OFM	Destruction of last item listed plus 1 year	Destroy when obsolete or superseded	This record should be protected from damage or loss by off-site storage of a security copy or by documenting the natural dispersal of copies inside and outside the agency.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

RECORDS MANAGEMENT

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: RECORDS MANAGEMENT

Disposition Authority No. GS50-09

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
8	RECORDS CIRCULATION DOCUMENTATION Documentation of materials pulled from and/or returned to records storage center.	OFM	Until materials returned to records center	Destroy when obsolete or superseded	
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	
10	RECORDS RETRIEVAL REQUEST (INTERNAL)	OFM	1 year	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: SECURITY

Disposition Authority No. GS51-05E

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	INTRUSION ALARM REPORT	OFM	1 year	Destroy when obsolete or superseded	
2	SECURITY ANNUAL REPORT	OPR	(School Board Minutes) PERMANENT	1 year	
3	SECURITY PATROL LOG	OFM	2 years	Destroy when obsolete or superseded	
4	STATEMENT FOR RESTITUTION Source document backup for billing.	OPR	6 years	Until completion of State Auditor's examination report	
5	SURVEILLANCE VIDEOS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	Videos of incidents resulting in legal action should be retained with other documentation pertaining to that incident and are subject to retention schedules.
6	VANDALISM, CRIMINAL CASE REPORTS	OFM	3 years	Destroy when obsolete or superseded	
7	WEAPONS CONFISCATION LOG	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

SECURITY

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: SKILL CENTER

Disposition Authority No. GS51-10

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	COMPETENCY CERTIFICATES	OPR	Permanent - Potentially archival – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record. 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 State Archives standards.
2	DENTAL PATIENT CARDS	OPR	8 years after last treatment	Destroy when obsolete or superseded	
3	SKILL TIME LOG/SHEET	OFM	Until end of school year	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

SKILL CENTER

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: SPECIAL EDUCATION STUDENT RECORDS

Disposition Authority No. GS51-05I

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ADA (AMERICANS WITH DISABILITIES ACT) / REHABILITATION ACT OF 1973 SECTION 504 COMPLAINT AND ACCOMMODATION FILES	OPR	Completion of accommodation plus 6 years	Destroy when obsolete or superseded	
2	SPECIAL EDUCATION STUDENT HISTORY FILE Includes psychological and IQ test results, decision packets, evaluation and other reports, final IEP report (plan), correspondence and other information regarding the student.	OFM	Age 21 plus 6 years	Destroy when obsolete or superseded	
3	SPECIAL EDUCATION STUDENT HISTORY FILE DISPOSITION NOTICE RECORD Log of notices sent to the last known address of parents or guardians advising them of the pending disposal of the Student History File and offering them the opportunity to take possession of the file or any of its contents as required by the Washington Administrative Code (WAC) and the Family Education Rights and Privacy Act (FERPA – See Appendix B).	OPR	7 years plus notification of parent/guardian	Destroy when obsolete or superseded	Suggested Procedure – Microfilm a. This records series may be retained permanently on microfilm instead of hard copy. b. Microfilming must be done according to standards issued by the State Archives and approved by the State Auditor as per RCW 40.20.020. c. Information subject to deletion as provided by the Family Education Rights and Privacy Act should be destroyed and not filmed.
4	SUMMARY ASSESSMENT REPORT FOR STUDENT NOT ASSIGNED TO THE SPECIAL EDUCATION PROGRAM	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R-E Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David Owens

For the State Archivist: David Owens

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: STUDENT ASSIGNMENT

Disposition Authority No. GS51-05J

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	APPEALS	OPR	3 years	Destroy when obsolete or superseded	
2	OUT OF DISTRICT BOUNDARY EXCEPTIONS / STUDENT RELEASES	OPR	Termination plus 6 years	Destroy when obsolete or superseded	
3	PARENT/GUARDIAN ASSIGNMENT REQUEST FORMS Generates student's assignment to a school.	OPR	3 years	Destroy when obsolete or superseded	
4	REGISTRATION	OPR	Enrollment plus 2 years	Destroy when obsolete or superseded	
5	SCHOOL ASSIGNMENT GUIDELINES	OPR	Included in School Board minutes and/or Resolutions	Destroy when obsolete or superseded	
6	STUDENT ASSIGNMENT CASE FILE Includes all documentation related to assignment.	OPR	3 years	1 year	If a student does not enroll, secondary copy may be destroyed.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

STUDENT ASSIGNMENT

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: STUDENT RECORDS

Disposition Authority No. GS51-05F

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	APPLICATION FOR CERTIFICATE OF EDUCATIONAL COMPETENCE	OFM	Superintendent of Public Instruction: 3 months	Testing Center: Until award of certificate	
2	AUTHORIZATION FOR RELEASE OF STUDENT RECORDS	OPR	3 years	Destroy when obsolete or superseded	
3	CONFIDENTIAL REPORTS (Also known as STANDARD REPORTS, GUIDANCE REPORTS, or SUPPLEMENTARY REPORTS) Includes subjective reports and anecdotal information (From district, outside agencies and individuals).	OFM	2 years after student graduates or withdraws	Destroy when obsolete or superseded	These records should be separated from the cumulative folder with access limited as per the Family Educational Rights and Privacy Act (FERPA).
4	GED PERMANENT TRANSCRIPT (GED TEST SCORES)	OPR	Retained by Superintendent of Public Instruction: PERMANENT	Testing Center: 100 years	
5	GED REQUEST FOR APPROVAL TO TEST FOR CERTIFICATE OF EDUCATIONAL COMPETENCE Age waiver.	OFM	District: 1 year	Testing Center: 3 months	
6	INDIVIDUAL STUDENT DATABASE RECORD	OFM	2 years after graduation or withdrawal	Destroy when obsolete or superseded	District may elect to maintain individual database until student reaches age 23.
7	STUDENT CUMULATIVE RECORD (Also known as STUDENT FILE FOLDER) Contains information collected on each student in addition to the Permanent Record or Transcript, regardless of storage medium or format.	OFM	2 years after student graduates or withdraws	Destroy when obsolete or superseded	Use caution when destroying records with longer retention periods.
8	STUDENT DISCIPLINE FILES Includes student expulsion records.	OPR	3 years after the incident	Destroy when obsolete or superseded	
9	STUDENT LOCATOR CARDS / CLASS SCHEDULES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

STUDENT RECORDS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: STUDENT RECORDS

Disposition Authority No. GS51-05F

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
10	STUDENT OFFICIAL RECORD Documents each student's enrollment and highest grade level attained in the District. It includes the student's legal name(s), date of birth, last known address, names of parent/guardians, date(s) of admission, date(s) of withdrawal, and all district schools attended. Documentation for students progressing to ninth grade or above must include the state standardized high school transcript.	OPR	100 years	Destroy when obsolete or superseded	SUGGESTED PROCEDURE – MICROFILM <ul style="list-style-type: none"> • This records series may be retained permanently on microfilm instead of hard copy. • Microfilming must be done according to standards issued by the State Archives and approved by the State Auditor as per RCW 40.20.020. • Information subject to deletion as provided by the Family Educational Rights and Privacy Act should be destroyed and not filmed.

SUPERSEDED

Approved by the Local Records Committee – April 1999

R-E Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

STUDENT RECORDS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: SUPERINTENDENT

Disposition Authority No. GS51-05

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ACCREDITATION CERTIFICATES	OPR	PERMANENT	Destroy when obsolete or superseded	
2	BOUNDARY RECORDS Official legal description and drawings of school district boundaries, including director district boundaries.	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
3	CERTIFICATION OF ELECTION OF SCHOOL BOARD PRESIDENT	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record. MICROFILM: This records series may be retained permanently on microfilm instead of hard copy for both on-site use and off-site security storage at the State Archives. Microfilm must meet State Archives standards.
4	CERTIFICATION OF SCHOOL DISTRICT ELECTIONS Including bonds, levies, and director elections.	OPR	PERMANENT	Destroy when obsolete or superseded	
5	DESCRIPTIVE GUIDE TO SCHOOL DISTRICT ADMINISTRATION AND STAFFING	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
6	OFFICIAL DISTRICT NEGOTIATED SCHOOL CALENDARS	OPR	PERMANENT – Potential archival value – See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
7	OFFICIAL DISTRICT POLICY AND PROCEDURE DIRECTIVES, REGULATIONS, AND RULES ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	PERMANENT – Potential archival value - See remarks	Destroy when obsolete or superseded	Contact your Regional Archivist before disposing of this record.
8	SCHOOL SERVICE BOUNDARY DECISION WORKING FILE	OFM	Approval of Board Resolution plus 3 years – Potential archival value – See remarks	Until approval of Board resolution	Contact your Regional Archivist before disposing of this record.
9	WARRANTIES	OPR	6 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

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For the State Archivist: David Owens

SUPERINTENDENT

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: TEACHING RECORDS

Disposition Authority No. GS51-06E

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	GRADE DOCUMENTATION – ELEMENTARY	OFM	1 year	Destroy when obsolete or superseded	
2	GRADE DOCUMENTATION – SECONDARY To provide documentation for grade and credit record challenges.	OFM	5 years	Destroy when obsolete or superseded	
3	LESSON PLANS	OFM	1 year	Destroy when obsolete or superseded	
4	STATEMENT OF REQUIREMENTS AND EXPECTATIONS, SIGNED AND RETURNED BY PARENT / GUARDIAN	OFM	Retain for current school year	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

TEACHING RECORDS

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: TRAFFIC SAFETY

Disposition Authority No. GS51-06D

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	AGREEMENT FOR USE OF TRAFFIC SAFETY EDUCATION VEHICLES	OPR	6 years	Destroy when obsolete or superseded	
2	APPLICATION FOR PROGRAM APPROVAL	OFM	1 year after acceptance	Destroy when obsolete or superseded	
3	APPLICATION FOR TRAFFIC SAFETY EDUCATION Teacher's affidavit for certification to be a traffic safety instructor.	OFM	End of term as safety instructor plus 6 years	Destroy when obsolete or superseded	May be kept in Employee History File (See Personnel-General)
4	STUDENT PARTICIPATION LISTS / RECORD CARD / GRADE BOOK	OPR	6 years	Destroy when obsolete or superseded	
5	STUDENT TRAFFIC SAFETY CERTIFICATES	OFM	Completion plus 3 years	Destroy when obsolete or superseded	
6	TRAFFIC SAFETY PARENT / GUARDIAN PERMISSION STATEMENTS	OFM	1 year	Destroy when obsolete or superseded	
7	TUITION ASSISTANCE ELIGIBILITY VERIFICATION RECORD Documents eligibility of low-income students for assistance in paying tuition for Traffic Safety classes.	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

Brian Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David W. Owens

For the State Archivist: David Owens

TRAFFIC SAFETY

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: TRANSPORTATION SERVICES/MOTOR POOL/VEHICLE MAINTENANCE

Disposition Authority No. GS51-05G

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
1	ACCIDENT REPORTS Washington State Patrol	OPR	6 years	Destroy when obsolete or superseded	
2	APPLICATION FOR MEDICAL TRANSPORTATION For students with medical problems, or physical disabilities to receive district transportation services.	OFM	Until completion of State Auditor's examination report	Destroy when obsolete or superseded	
3	BILLING TO OTHER AGENCIES FOR USE OF VEHICLES	OPR	6 years	Destroy when obsolete or superseded	
4	BUS CONDITION CHECKLIST Daily evaluation of bus by drivers.	OFM	1 year	Destroy when obsolete or superseded	
5	BUS GARAGE WORK ORDERS Prepared by garage or shop personnel. Shows description of work, time, parts, and employee(s) performing work.	OFM	3 years	Destroy when obsolete or superseded	
6	BUS OPERATIONS DAILY LOG May show bus route, time trip began and ended, number of pupils carried, and driver's signature.	OPR	6 years	Destroy when obsolete or superseded	
7	BUS SCHEDULE FOR ALL SCHOOLS Shows route, stops and time for each bus. Includes state approved route map.	OFM	3 years	Until revised	
8	BUS TRIP REQUEST / AUTHORIZATION May show school, nature of trip, date, destination, miles, number of pupils, supervisor, departure, and time.	OFM	3 years	Destroy when obsolete or superseded	
9	BUS TRIP TICKET LOGS May show school, nature of trip, date, destination, miles, number or pupils, supervisor, departure, and times.	OPR	6 years	Destroy when obsolete or superseded	
10	CERTIFICATES OF TITLE FOR DISTRICT VEHICLES	OPR	Until disposition of vehicle and completion of State Auditor's examination report	Destroy when obsolete or superseded	
11	FUEL/OIL USAGE RECORD	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

Cliff Whipple

David M. Owens

For the Attorney General: Brian Buchholz

For the State Auditor: Cliff Whipple

For the State Archivist: David Owens

TRANSPORTATION SERVICES/MOTOR POOL/VEHICLE MAINTENANCE

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

Category: TRANSPORTATION SERVICES/MOTOR POOL/VEHICLE MAINTENANCE

Disposition Authority No. GS51-05G

ITEM NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	MINIMUM RETENTION PERIOD		SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY	
12	GAS, OIL, AND DIESEL REPORTS FOR BUSES AND OTHER VEHICLES SPI reports prepared from this data. May list vehicle number, amount of fuel pumped, odometer reading.	OFM	3 years	Destroy when obsolete or superseded	
13	NOTICE OF IMPROPER CONDUCT ON THE BUS May show bus route, time of incident, nature of incident, and student(s)' name(s).	OFM	1 year	Destroy when obsolete or superseded	
14	VEHICLE CHECKOUT LOG	OFM	3 years	Destroy when obsolete or superseded	
15	VEHICLE DATA AND STATISTICAL REPORTS	OFM	3 years	Destroy when obsolete or superseded	
16	VEHICLE LEASES	OPR	Termination plus 6 years	Destroy when obsolete or superseded	
17	VEHICLE MAINTENANCE HISTORY LOG	OFM	Until disposal or sale of equipment or vehicle	Destroy when obsolete or superseded	
18	VEHICLE MAINTENANCE REPORTS	OFM	3 years	Destroy when obsolete or superseded	
19	VEHICLE MILEAGE LOG	OFM	3 years	Destroy when obsolete or superseded	
20	VEHICLE SALE AND SALVAGE RECORD	OPR	6 years	Destroy when obsolete or superseded	
21	VEHICLE USE REQUEST	OFM	3 years	Destroy when obsolete or superseded	

SUPERSEDED

Approved by the Local Records Committee – April 1999

R.E. Buchholz

For the Attorney General: Brian Buchholz

Cliff Whipple

For the State Auditor: Cliff Whipple

David M. Owens

For the State Archivist: David Owens

TRANSPORTATION SERVICES/MOTOR POOL/VEHICLE MAINTENANCE

**GENERAL RECORDS RETENTION SCHEDULE
FOR SCHOOL DISTRICTS AND EDUCATIONAL SERVICE DISTRICTS**

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