

PUBLIC HOSPITAL DISTRICTS  
OF WASHINGTON STATE

RECORDS MANAGEMENT  
GUIDELINES

<http://www.secstate.wa.gov/archives/doc/Records Management Guidelines.doc>

and

**SUPERSEDED**  
GENERAL RECORDS  
RETENTION SCHEDULE

Approved and Issued by the Washington State Local Records Committee January 2002

This publication updates your November 1999 edition of the Public Hospital Districts General Records Retention Schedules. These manuals share record series used by Local Governments (e.g. Accounting, Personnel, Records Management etc). which were revised January 2002. The main purpose of this edition is to update those revised shared general schedule record series. If you have any questions regarding this manual, please contact your Regional Branch Archives at <http://www.secstate.wa.gov/archives/archives.asp> or the Records Management staff in Olympia 360.586.4902

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# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## ACCOUNTING

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for other copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.


**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## ACCOUNTING - INCLUSIVE

Approved by the Washington State Local Records Committee – Revised July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

**Schedule Title: ACCOUNTING –BANKING**

**DISPOSITION AUTHORITY GS50-03B**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	BANK ACCOUNT RECONCILIATIONS	OFM	3 years	Destroy when obsolete or superseded	GS50-03B-01	
2	BANK DEPOSIT RECORDS Includes passbooks and deposit slips for both checking and savings accounts in all locations.	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-02	
3	DEPOSIT REGISTER - UTILITIES ACCOUNTING	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-02	
4	BANK STATEMENTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-03	
5	CANCELLED CHECKS/WARRANTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-04	
6	CASH BOOK	OFM	6 years	Destroy when obsolete or superseded	GS50-03B-05	
7	CHECK STUBS OR DUPLICATE COPIES	OFM	3 years	Destroy when obsolete or superseded	GS50-03B-06	
8	DESIGNATION OF BANK OR OTHER DEPOSITORY FOR AGENCY FUNDS	OFM	6 years after withdrawal of designation	Destroy when obsolete or superseded	GS50-03B-07	
9	STATEMENTS OF BOND OR OTHER COLLATERAL SECURITY POSTED BY BANK (Or other depository)	OFM	3 years	Destroy when obsolete or superseded	GS50-03B-09	
10	APPLICATION FOR DUPLICATE INSTRUMENT, AFFIDAVIT, AND BOND 1. Authority to issue duplicated check or warrant in case of loss or destruction. 2. Notarized oath that original was lost or destroyed and request for replacement.	OPR	6 years	Destroy when obsolete or superseded	GS50-03B-10	
11	<b>SIGNATURE RECORDS</b> List of employees and their signatures who are authorized to sign checks/warrants.	OPR	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS50-03B-11	

**Schedule Title: ACCOUNTING – BUDGET**

**DISPOSITION AUTHORITY GS50-03D**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ANNUAL ESTIMATE OF REVENUE AND EXPENDITURES	OFM	2 years	Destroy when obsolete or superseded	GS50-03D-01	
2	ANNUAL REPORT OF CHIEF FISCAL OFFICER TO COMMISSIONERS/COUNCIL Includes annual financial reports compiled by all units of local government as per statute, charter, and agency policy.	OFM	Clerk of governing council, commission or board - PERMANENT - 1 copy archival - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03D-02	Contact your Regional Archivist - one copy of each available report should be assembled for transfer to Regional Archives.

**Schedule Title: ACCOUNTING – BUDGET**

**DISPOSITION AUTHORITY GS50-03D**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
3	BUDGET DEVELOPMENT OR WORKING FILES Background information and draft documents compiled in the course of budget preparation.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-03D-03	
4	BUDGET FORECAST REPORTS	OFM	1 year	Destroy when obsolete or superseded	GS50-03D-04	
5	BUDGET OFFICER'S MONTHLY REPORT TO GOVERNING COUNCIL, COMMISSION, OR BOARD	OPR	6 years	Destroy when obsolete or superseded	GS50-03D-05	
6	BUDGET STATUS REPORT Includes all types of periodic budget status reports compiled by all units of local government as per statute, charter, or agency policy.	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-03D-06	
7	DEPARTMENTAL BUDGET REQUESTS	OFM	2 years	Destroy when obsolete or superseded	GS50-03D-07	
8	FINAL BUDGET	OFM	Clerk of governing council, commission or board - PERMANENT - 1 copy archival - See remarks	Destroy when obsolete or superseded	GS50-03D-08	Contact your Regional Archivist - one copy of each available report should be assembled for transfer to Regional Archives.
9	FINANCIAL STATEMENTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03D-09	
10	PRELIMINARY BUDGETS	OFM	2 years	Destroy when obsolete or superseded	GS50-03D-10	

**Schedule Title: ACCOUNTING – GENERAL**

**DISPOSITION AUTHORITY GS50-03A**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	SUBSIDIARY LEDGERS All ledgers dedicated to individual funds or functions, including but not limited to: accounts payable, accounts receivable, appropriations, bonded debt, equipment operation cost, expenditures, investments, properties, and revenue.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-01	
2	ACCOUNTS PAYABLE AND RECEIVABLE SUPPORTING DOCUMENTS AND REPORTS Specialized reports and background files documenting the status of or adjustments to accounts.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-02	
3	BILLS OF SALE	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-04	

Schedule Title: ACCOUNTING – GENERAL

DISPOSITION AUTHORITY GS50-03A

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
4	REVENUE BOND AND COUPON REGISTER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-05	
5	CASH ACCOUNTS SUPPORTING DOCUMENTS AND REPORTS Documentation of status and adjustments to cash accounts.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-06	
6	CASH RECEIPTS TRANSMITTALS Forms transmitting money to and from the agency.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-07	
7	CASH RECEIPTS TRANSMITTALS-INTERNAL Forms transmitting money within the agency.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-08	
8	DAILY CASH REPORT OR SUMMARY	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-09	
9	DISTRIBUTION OF EXPENDITURES	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-10	
10	EXPENDITURE TRANSACTION REPORTS Adjustments to coding of expenditures and correcting errors.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-11	
11	FIXED ASSETS INVENTORY DOCUMENTATION Includes fixed asset inventory (year-end) as well as documentation of current status, and updates and adjustments to the fixed asset inventory.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-12	
12	FUND ACCOUNTS SUPPORTING DOCUMENTS AND REPORTS Documentation of status and adjustments to individual funds.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-13	
13	GENERAL AND SUBSIDIARY JOURNALS All journals for all funds and functions, including but not limited to: cash disbursements and cash receipts.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-14	

SUPERSEDED

Schedule Title: ACCOUNTING – GENERAL

DISPOSITION AUTHORITY GS50-03A

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
14	GENERAL LEDGER  <b>ESSENTIAL RECORD</b> - Needs security backup - See remarks.	OPR	6 years  Pre-1900 general ledgers have potential archival value - See remarks	Destroy when obsolete or superseded	GS50-03A-15	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. Accounting system documentation should be protected from damage or loss by off site storage of backup tapes. In non-automated systems, security copies of the general ledger and other official accounting documents should be stored off site, or a list that identifies the locations of other copies inside and outside the agency should be kept.
15	INTERNAL REVENUE SERVICE (IRS) FORM W-9	OFM	4 years	Destroy when obsolete or superseded	GS50-03A-16	
16	INTERNAL REVENUE SERVICE (IRS) FORM 1099	OFM	4 years	Destroy when obsolete or superseded	GS50-03A-17	
17	INVENTORY OF FIXED ASSETS Year-end report.	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-03A-18	
18	INVESTMENT ACCOUNTS SUPPORTING DOCUMENTS AND REPORTS Documentation of status and adjustments to investment accounts.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-19	
19	PETTY CASH RECORD	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-20	
20	RECEIPTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-21	
21	RECORD OF SUPPLIES DRAWN FROM CENTRAL STORES	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-22	
22	REGISTER FOR FUNDS REMITTED TO FISCAL OFFICER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-23	
23	REMITTANCE ADVICES	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-24	
24	REVENUE BONDS AND COUPONS Includes general obligation bonds.	OPR	6 years after redemption.	Destroy when obsolete or superseded	GS50-03A-25	
25	STATE AUDITOR'S EXAMINATION REPORT	OFM	State Auditor's office - PERMANENT	Destroy when obsolete or superseded	GS50-03A-26	
26	TREASURER/FINANCE OFFICER FINANCIAL REPORTS	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-27	

Schedule Title: ACCOUNTING – GENERAL

DISPOSITION AUTHORITY GS50-03A

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
27	TRIAL BALANCES	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-28	
28	VOUCHER REGISTER	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-29	
29	VOUCHERS All invoices for all funds and purposes with attached supporting documentation. Includes Travel Vouchers/Authorizations.	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-30	
30	WARRANT/CHECK REGISTERS	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-31	
31	PAYROLL OR EXPENSE CHECKS LOG/SHEET Log or sheet that is signed by person picking up payroll or expense checks.	OFM	3 years	Destroy when obsolete or superseded	GS50-03A-32	
32	WARRANT REGISTERS	OPR	6 years	Destroy when obsolete or superseded	GS50-03A-31	

Schedule Title: ACCOUNTING -GRANTS

DISPOSITION AUTHORITY GS50-03C

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ANNUAL FINANCIAL STATUS REPORTS - GRANTS Annual report submitted for continuing grants containing summaries and breakdowns of expenditures for the past year.	OFM	3 years or retain for period required by grant or program - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-01	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
2	FINAL GRANT EXPENDITURE REPORT End of a project report accounting for the expenditure of grant funds submitted for non-continuing grants.	OFM	3 years or retain for period required by grant or program – Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-02	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.



Schedule Title: ACCOUNTING -GRANTS

DISPOSITION AUTHORITY GS50-03C

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
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 or retain for period required by grant or program - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-03	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
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 from the date of submission of the final expenditure report or retain for period required by grant or program - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-04	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
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 from the date of submission of the final expenditure report or retain for period required by grant or program - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-05	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
6	GRANT APPLICATIONS - APPROVED Includes narrative explanation of the nature and purpose of the proposed project, amount of funds requested, matching funds, in-kind contributions, and plan of work.	OPR	3 years from the date of submission of the final expenditure report or retain for period required by grant or program - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-06	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken.
7	GRANT APPLICATIONS - NOT APPROVED	OFM	1 year	Destroy when obsolete or superseded	GS50-03C-07	
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	GS50-03C-08	

SUPERSEDED

Schedule Title: ACCOUNTING -GRANTS

DISPOSITION AUTHORITY GS50-03C

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
9	GRANT PROJECT REPORTS Statement on progress, problems, and success in the completion of the grant project, including periodic, annual, special, and final reports.	OPR	3 years from the date of submission of the final expenditure report or retain for period required by grant or program – Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-09	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
10	GRANTS - STATISTICAL DOCUMENTATION	OFM	3 years from the date of submission of the final expenditure report or retain for period required by grant or program – Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03C-10	For federal grants, reference 24 CFR 84. 85(c) (2) If any litigation, claim, or audit is started before the expiration of the 3-year period, the records shall be retained until all litigation, claims or audit findings involving the records have been resolved and final action taken. Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
11	WARRANT, CHECK, OR VOUCHER REGISTERS-GRANT FUNDS Numerical listing of checks, warrants, and vouchers from transactions involving grant funds.	OPR	6 years or until satisfaction of grant audit requirements, whichever is longer	Destroy when obsolete or superseded	GS50-03C-11	

SUPERSEDED

Schedule Title: ACCOUNTING – INTERNAL AUDIT

DISPOSITION AUTHORITY GS50-03F

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	AUDIT SUBJECT/REFERENCE FILES Cumulative data on departments and audit issues.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-03F-01	
2	FISCAL AND PERFORMANCE AUDIT REPORTS Final report of audit findings.	OPR	6 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03F-02	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
3	TECHNICAL REFERENCE MATERIALS – INTERNAL AUDIT Audit related publications and documents gathered for reference.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-03F-03	

Schedule Title: ACCOUNTING – PAYROLL

DISPOSITION AUTHORITY GS50-03E

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	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	GS50-03E-01	
2	BENEFIT DETAIL REPORTS - PAYROLL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-02	
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	GS50-03E-03	
4	DAILY, WEEKLY, OR MONTHLY TIME ACCUMULATION REPORTS (TIME CARDS) May be used as retirement verification.  ESSENTIAL RECORD if used for retirement verification – Needs security microfilm backup – <b>See remarks.</b>	OPR  OFM	If used for retirement verification – 60 years  If NOT used for retirement verification – 3 years <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03E-04	Retain for 60 years if employee pay histories or payroll registers are not used for retirement verification. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
5	DIRECT PAYROLL DEPOSIT AUTHORIZATION	OFM	Until transferred to cancellation file	Destroy when obsolete or superseded	GS50-03E-05	
6	DIRECT PAYROLL DEPOSIT AUTHORIZATION CANCELLATION	OFM	4 years	Destroy when obsolete or superseded	GS50-03E-06	

Schedule Title: ACCOUNTING – PAYROLL

DISPOSITION AUTHORITY GS50-03E

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
7	DIRECT PAYROLL DEPOSIT ENROLLEES DETAIL DATA	OFM	1 year	Destroy when obsolete or superseded	GS50-03E-07	
8	DIRECT PAYROLL DEPOSIT HASH SHEET	OFM	1 year	Destroy when obsolete or superseded	GS50-03E-08	
9	DIRECT PAYROLL DEPOSIT PRE-NOTE DATA	OFM	1 year	Destroy when obsolete or superseded	GS50-03E-09	
10	DIRECT PAYROLL DEPOSIT TRANSMITTAL LISTINGS	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-10	
11	DISABILITY, HEALTH AND WELFARE CLAIMS - PAYROLL	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	GS50-03E-11	
12	EMPLOYEE EARNINGS QUARTERLY REPORTS	OFM	4 years	Destroy when obsolete or superseded	GS50-03E-12	
13	EMPLOYEES WITHHOLDING EXEMPTION CERTIFICATES (W-4)	OFM	4 years	Destroy when obsolete or superseded	GS50-03E-13	
14	EMPLOYER'S COPIES OF FEDERAL WITHHOLDING TAX STATEMENT (W-2)	OFM	4 years	Destroy when obsolete or superseded	GS50-03E-14	
15	INDIVIDUAL EMPLOYEE PAY HISTORY May be used for verification of eligibility for retirement benefits.  <b>ESSENTIAL RECORD</b> if used for retirement verification – Needs security microfilm backup – <b>See remarks.</b>	OPR  OFM	If used for retirement verification – 60 years  If NOT used for retirement verification – 3 years <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03E-15	Either the individual employee pay history or the payroll register must be kept for long-term verification of retirement eligibility. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
16	LABOR AND INDUSTRIES REPORT ON PAYROLL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-16	
17	LEAVE BUY-BACK ACCEPTANCE FORMS	OPR	6 years	Destroy when obsolete or superseded	GS50-03E-17	
18	LEAVE SHARING AUTHORIZATION	OPR	6 years	Destroy when obsolete or superseded	GS50-03E-18	
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	GS50-03E-19	
20	MEDICAL INSURANCE REPORTS - PAYROLL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-20	
21	OLD AGE SECURITY INSURANCE (OASI) REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-21	

Schedule Title: ACCOUNTING – PAYROLL

DISPOSITION AUTHORITY GS50-03E

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
22	PAYROLL REGISTER  May be used for verification of eligibility for retirement benefits.  <b>ESSENTIAL RECORD</b> if used for retirement verification – Needs security microfilm backup – <b>See remarks.</b>	OPR  OFM	If used for retirement verification – 60 years  If NOT used for retirement verification – 3 years <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03E-22	Either the individual employee pay history or the payroll register must be kept for long-term verification of retirement eligibility. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
23	RECORDS OF ATTACHMENTS OR GARNISHMENTS OF SALARIES OR WAGES	OPR	Satisfaction plus 6 years	Destroy when obsolete or superseded	GS50-03E-23	
24	STATE EMPLOYEES RETIREMENT TRANSMITTAL	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-24	
25	SUPPORTING DOCUMENTS AND REPORTS - PAYROLL Documentation of status of and adjustments to payroll accounts.	OFM	3 years	Destroy when obsolete or superseded	GS50-03E-25	

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## ADMINISTRATIVE MATERIALS WITH NO RETENTION VALUE

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for other copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## ADMINISTRATIVE MATERIALS WITH NO RETENTION VALUE - INCLUSIVE Approved by the Washington State Local Records Committee – Revised July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

**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:**

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

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys ([see Documenting Records Destruction, page 13](#)). An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, the retention period for the other agency/office's copy will be highlighted in these schedules.

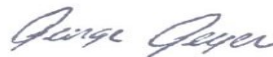
General records retention schedule listings for some records series include special designations and disposition instructions, including:

- **Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.
- **Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.
- **Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS - INCLUSIVE Approved as revised by the Washington State Local Records Committee – January 2002



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer

  
For the State Archivist, Diana Bradrick

**The State Archivist: Jerrv Handfield**



**Schedule Title: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS**

**DISPOSITION AUTHORITY GS 50-01**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ADMINISTRATIVE PROCEDURES AND INSTRUCTIONS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-01	
2	ADMINISTRATIVE WORKING FILES Subject files containing informational copies of various records organized by issue, person, subject, or other areas of interest.	OFM	Destroy when obsolete or superseded - elected official, executive and department head files are potentially archival - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-02	Contact your Regional Archivist before disposing of elected official, executive, or department head files. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
3	ANNUAL REPORTS – OFFICE REFERENCE COPIES Copies of reports of activities submitted yearly to the governing council, commission, or board.	OFM	Clerk of governing council, commission, or board keeps primary copy PERMANENT - 1 copy archival - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-05A-04	Contact your Regional Archivist. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
4	APPLICATION FOR EMPLOYMENT WHEN APPLICANT IS NOT HIRED – OFFICE REFERENCE COPIES Copies of employment applications submitted by applicants who were <b>not</b> hired.	OFM	Personnel office keeps primary copy 3 years	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-04B-01	
5	APPOINTMENT CALENDARS	OFM	Destroy when obsolete or superseded – <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-36	Elected officials and department heads may want to retain appointment calendars to document activities and appointments for a longer period of time.
6	BIOGRAPHICAL FILES ON AGENCY OFFICIALS AND STAFF – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-06F-01	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
7	BUDGET AND BUDGET DEVELOPMENT FILES – OFFICE REFERENCE COPIES The final budgets are retained permanently as reference attachments to the ordinances or resolutions that adopt them.	OFM	Final budget is kept by clerk of governing council, commission, or board PERMANENT  Budget development and request files are retained 2 years by the finance or budget office	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-03D-03	
8	CENSUS RECORDS FROM THE STATE OFFICE OF FINANCIAL MANAGEMENT	OFM	The State Office of Financial Management keeps primary copy PERMANENT	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	GS50-01-37	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

SUPERSEDED

**Schedule Title: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS**

**DISPOSITION AUTHORITY GS 50-01**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
9	CHRONOLOGICAL REFERENCE FILE Also known as reading or day file. Used as a chronological reference source supplemental to correspondence and subject reference files.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-08	
10	CITIZENS' COMPLAINTS/REQUESTS	OFM	3 years	Destroy when obsolete or superseded	GS50-01-09	
11	CLAIMS FOR DAMAGES	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	GS50-01-10	
12	CONTRACTS, AGREEMENTS, AND WARRANTIES	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-01-11	
13	CORRESPONDENCE Letters and attached materials sent and received during the course of agency business.	OFM	2 years - elected official, executive, and department head files are potentially archival - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-12	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
14	FINANCIAL REPORTS – OFFICE REFERENCE COPIES Copies of financial reports made to and/or by the department regarding its, expenditures and the status of its budget.	OFM	3 years or until completion of State Auditor's examination report	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-3D-06	
15	FISCAL, PURCHASE AND RECEIVING DOCUMENTS	OFM	Finance or Purchasing Office keeps primary copies 6 years	Destroy when obsolete or superseded	GS50-01-17	
16	GOVERNING COUNCIL, COMMISSION, AND BOARD MEETING AGENDAS/PACKETS – OFFICE REFERENCE COPIES	OFM	Clerk of governing council, commission or board keeps primary copy 3 years	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-05A-03	
17	GOVERNING COUNCIL, COMMISSION, COMMITTEE, AND BOARD MINUTES – OFFICE REFERENCE COPIES	OFM	Clerk of governing council, commission or board keeps primary copy PERMANENT	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-05A-13	
18	HISTORICAL FILES OF THE AGENCY – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-06F-02	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
19	LEGAL OPINIONS – OFFICE REFERENCE COPIES	OFM	Agency attorney keeps primary copy PERMANENT - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS53-02-03	If the agency contracts for outside legal representation, the primary record copy will probably be held by agency's executive administration.

SUPERSEDED

**Schedule Title: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS**

**DISPOSITION AUTHORITY GS 50-01**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
20	LITIGATION FILES – OFFICE REFERENCE COPIES	OFM	Legal office or executive administration keeps until case closed plus 10 years - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS53-02-04	Primary copies of official court documents are held permanently by the Clerk of Superior Court, or 10 years by the District or Municipal Court Administrator. Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
21	MAILING LISTS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-21	
22	MASTER FILE OF AGENCY PUBLICATIONS – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-06F-04	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
23	NEWSPAPER CLIPPINGS – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-06F-05	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
24	OFFICIAL AGENCY POLICY AND PROCEDURE DIRECTIVES, REGULATIONS, AND RULES  <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b> (See item #1 for administrative procedures and instructions).	OPR	PERMANENT as adopted - One copy archival - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-24	Contact your Regional Archivist before destroying the original record. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
25	ORDINANCE AND RESOLUTION DEVELOPMENT FILES Documentation of the analysis and development of ordinances and/or resolutions submitted for the approval of the agency's governing council, commission, or board.	OFM	3 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-25	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
26	ORDINANCES AND RESOLUTIONS – OFFICE REFERENCE COPIES	OFM	Clerk of the governing council, commission, committee, or board keeps primary copy PERMANENT	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-05A-16	
27	PAYROLL REPORTS – OFFICE REFERENCE COPIES	OFM	Payroll office keeps primary copy- 3 years, OR 60 years if needed for retirement audit	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-03E-25	

SUPERSEDED

**Schedule Title: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS**

**DISPOSITION AUTHORITY GS 50-01**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
28	PERSONNEL FILES – OFFICE REFERENCE COPIES	OFM	Personnel office keeps primary copy until termination of employment plus 6 years	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-04B-06	
29	PHOTOGRAPHS AND OTHER AUDIO VISUAL MATERIAL – <i>OFFICE REFERENCE COPIES</i> Photographic negatives may be held in the Regional Archives for permanent preservation and security backup - <b>See remarks.</b>	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-06F-06	Contact your Regional Archivist before disposing of this record or to discuss transfer of negatives for permanent preservation and security backup.
30	PRESS RELEASES – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-06F-07	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
31	PUBLIC OPINION POLLS	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-30	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
32	RECEIPTS FOR CASH RECEIVED – <i>OFFICE REFERENCE COPIES</i>	OFM	Finance office keeps primary copy 6 years	<b>Office references copies</b> - Keep 3 years	GS50-03A-21	
33	REQUESTS FOR LEAVE/OVERTIME	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-09	
34	RESEARCH/PROGRAM REPORTS, STUDIES, SURVEYS, MODELS, AND ANALYSES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-32	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
35	SCRAPBOOKS AND ALBUMS	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-08	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
36	SPEECHES BY OFFICIALS AND STAFF REPRESENTING THE AGENCY – <i>OFFICE REFERENCE COPIES</i>	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	<b>Office references copies</b> - Destroy when obsolete or superseded	GS50-06F-09	Contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
37	SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04B-30	
38	TELEPHONE LOGS AND USAGE DETAIL REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-01-35	

SUPERSEDED

**Schedule Title: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS**

**DISPOSITION AUTHORITY GS 50-01**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
39	WORK PLANS Plan of an agency's actions for the coming year. Documents agency, section, or program timelines and areas of responsibility to specific actions.	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-38	Contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## ADMITTING

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. ~~All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.~~

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## ADMITTING - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: **ADMITTING**

**DISPOSITION AUTHORITY GS55-03B**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ADMISSIONS AND DISCHARGES STATISTICAL REPORT	OFM	3 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03B-01	Contact your Regional Archivist before disposing of this record.
2	PATIENT REGISTER  <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03B-02	Reference WAC 246-318-440 (11) (a) (iv). Should be protected from damage or loss by offsite storage of backup tapes. In non-automated systems, security copies should be stored off site, or the natural dispersal of copies inside and outside the agency should be documented.
3	PATIENT VALUABLES LOG	OFM	3 years	Destroy when obsolete or superseded	GS55-03B-03	
4	SURGERY SCHEDULE/OPERATION REGISTER	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03B-04	Reference WAC 246-310-440 (7) (a) (iv).

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## ADVISORY COUNCILS, COMMISSIONS AND BOARDS

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

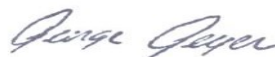
**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

### ADVISORY COUNCILS, COMMISSIONS AND BOARDS - INCLUSIVE

Approved by the Washington State Local Records Committee – Revised July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs



Schedule Title: **ADVISORY COUNCILS, COMMISSIONS AND BOARDS**

**DISPOSITION AUTHORITY GS50-05B**

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

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## AMBULATORY SURGICAL CENTER

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## AMBULATORY SURGICAL CENTER - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: AMBULATORY SURGICAL CENTER**

**DISPOSITION AUTHORITY GS55-03Y**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	CONDITIONS OF PARTICIPATION/ ACCREDITATION SURVEY	OPR	6 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03Y-01	Reference 42 CFR 416.26 and 42 CFR 416.140.
2	LEGEND DRUG ORDER	OPR	6 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03Y-02	Reference WAC 246-904-030(3).
3	PRESCRIPTION AND REFILL RECORDS	OFM	2 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03Y-03	Reference WAC 246-904-070, WAC 246-869-100.

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## CENTRAL SERVICES

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. ~~All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.~~

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## CENTRAL SERVICES - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: CENTRAL SERVICES**

**DISPOSITION AUTHORITY GS55-03C**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	AUTOCLAVE RECORDS Daily sterilizing reports.	OFM	3 years	Destroy when obsolete or superseded	GS55-03C-01	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## DIETARY

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## DIETARY - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: DIETARY**

**DISPOSITION AUTHORITY GS55-03D**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	FOOD REFRIGERATION TEMPERATURE LOG	OFM	2 years	Destroy when obsolete or superseded	GS55-03D-01	
2	HEALTH FOOD HANDLERS PERMITS	OFM	Until reviewed	Destroy when obsolete or superseded	GS55-03D-02	
3	MEAL COUNT	OFM	3 years	Destroy when obsolete or superseded	GS55-03D-03	
4	MENUS FOR HOSPITAL CAFETERIA Excludes patient menus.	OFM	1 year	Destroy when obsolete or superseded	GS55-03D-04	
5	PATIENT DIET INSTRUCTIONS	OFM	3 years	Destroy when obsolete or superseded	GS55-03D-05	
6	PATIENT MENUS	OFM	3 years	Destroy when obsolete or superseded	GS55-03D-06	
7	SUMMARY OF FOOD COSTS	OFM	3 years	Destroy when obsolete or superseded	GS55-03D-07	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## ELECTRONIC INFORMATION

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys (*see Documenting Records Destruction, page 13*). An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, the retention period for the other agency/office's copy will be highlighted in these schedules.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## ELECTRONIC INFORMATION - INCLUSIVE

Approved by the Washington State Local Records Committee - July, 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs



**Schedule Title: ELECTRONIC INFORMATION - GENERAL**

<b>DATA AND INPUT DOCUMENTATION</b>	
<b>DATABASE AND SPREADSHEET DATA</b> <b>FINDING AIDS AND INDEXES (USER WORKING COPY)</b> <b>INPUT DOCUMENTS</b> <b>WORD PROCESSING FILES</b>	<p>Primary record copies of completed drafts and documents should be filed with the appropriate records series and retained in hard copy or electronic form according to the minimum retention periods approved by the Local Records Committee for those records series.</p> <p>User and other secondary copies should be retained until obsolete or superseded. The appropriate Disposition Authority Number (DAN) should be referenced when documenting the disposal of public record information regardless of the medium or format in which they are stored.</p>
<b>ELECTRONIC MAIL</b>	
<p>Electronic mail (E-mail) is primarily a communication system. Individual E-mail messages may be public records with legally mandated retention requirements, or may be information with no retention value. E-mail messages are public records when they are created or received in the transaction of public business and retained as evidence of official policies, actions, decisions, or transactions. Such messages must be identified, filed, and retained just like records in other formats.</p> <p>Currently few E-mail systems are designed to categorize and retain information. E-mail messages with public record content should be retained in E-mail format only as long as they are being worked on or distributed. Upon completion, E-mail messages containing public record information should be printed out or transferred to an electronic document management system, filed with the appropriate record series, and retained for the minimum retention period assigned by the Local Government General Records Retention Schedule or a records retention schedule approved specifically for the agency by the Local Records Committee.</p>	
<p><b>E-mail messages which are usually public records and must meet records retention requirements before being destroyed:</b></p> <ol style="list-style-type: none"> <li>1. Policy and Procedure Directives</li> <li>2. Correspondence or memoranda related to official public business</li> <li>3. Agendas and minutes of meetings</li> <li>4. Documents relating to legal or audit issues</li> <li>5. Messages which document agency actions, decisions, operations and responsibilities</li> <li>6. Documents that initiate, authorize or complete a business transaction</li> <li>7. Drafts of documents that are circulated for comment or approval</li> <li>8. Final reports or recommendations</li> <li>9. Appointment calendars</li> <li>10. E-mail distribution lists</li> <li>11. Routine information requests</li> <li>12. Other messages sent or received that relate to the transaction of local government business</li> </ol>	<p><b>E-mail Messages Which Are Usually Administrative Materials with No Retention Value:</b></p> <ol style="list-style-type: none"> <li>1. Information-only copies, or extracts of documents distributed for reference or convenience, such as announcements or bulletins</li> <li>2. Phone message slips that do not contain information that may constitute a public record</li> <li>3. Copies of published materials</li> <li>4. Informational copies</li> <li>5. Preliminary drafts</li> <li>6. Routing slips</li> <li>7. Transmittals (Letters/memos)</li> </ol> <p><b>See e-mail guidelines in the records management section of this manual.</b></p>

**Schedule Title: ELECTRONIC INFORMATION - SYSTEM DOCUMENTATION**

**DISPOSITION AUTHORITY: GS50-06A**

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

SUPERSEDED

**Schedule Title: ELECTRONIC INFORMATION - SYSTEM DOCUMENTATION**

**DISPOSITION AUTHORITY: GS50-06A**

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

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## EMERGENCY DEPARTMENT

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## EMERGENCY DEPARTMENT - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: EMERGENCY DEPARTMENT**

**DISPOSITION AUTHORITY GS55-03E**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	PATIENT LOGS  <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OFM	PERMANENT - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03E-01	Reference WAC 246-318-440 (11) (a) (v). 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	PHYSICIAN CALL SCHEDULE	OFM	5 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03E-02	See Health Care Financing Administration guidelines.

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## FACILITY AND PROPERTY MANAGEMENT

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for other copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

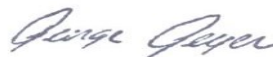
**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## FACILITY AND PROPERTY MANAGEMENT - INCLUSIVE

Approved by the Washington State Local Records Committee – Revised July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

Schedule Title: ENVIRONMENTAL QUALITY - FOR AGENCY-OWNED PROPERTY

DISPOSITION AUTHORITY GS55-05H

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	POLLUTION AND POLLUTION CONTROL STUDIES	OFM	5 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-05H-01	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	STATE ENVIRONMENTAL POLICY ACT (SEPA) DETERMINATION OF SIGNIFICANCE OR NON-SIGNIFICANCE	OPR	Disposal or sale of property plus 10 years	Destroy when obsolete or superseded	GS55-50H-02	
3	STATE ENVIRONMENTAL POLICY ACT (SEPA) ENVIRONMENTAL CHECKLISTS	OPR	Disposal or sale of property plus 10 years	Destroy when obsolete or superseded	GS55-50H-03	
4	STATE ENVIRONMENTAL POLICY ACT (SEPA) ENVIRONMENTAL IMPACT STATEMENTS Submitted for land use code approval of agency projects.	OPR	Disposal or sale of property plus 10 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-50H-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

Schedule Title: FACILITIES MANAGEMENT

DISPOSITION AUTHORITY GS50-06B

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
5	BOILER VESSEL REPORTS A. Report of boiler inspection by custodian. B. Report of boiler or hot water tanks by insurance company or labor and industries.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-01	
6	ENGINEERING AND ARCHITECTURAL DRAWINGS AND SPECIFICATIONS Architectural, structural, plumbing, electrical, etc. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks</b> .	OPR	Disposal or sale of property plus 10 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06B-02	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in the records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
7	FIRE EXTINGUISHER INSPECTION TAGS Prepared by fire departments or private firms.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-03	
8	FIXED ASSET INVENTORIES - FACILITY AND PROPERTY MANAGEMENT	OFM	Destroy when obsolete or superseded plus 3 years	Destroy when obsolete or superseded	GS50-06B-04	

**Schedule Title: FACILITIES MANAGEMENT**

**DISPOSITION AUTHORITY GS50-06B**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
9	KEY / CARD KEY INVENTORY - FACILITY AND PROPERTY MANAGEMENT Documentation of facility keys and/or card keys assigned to agency personnel. <b>ESSENTIAL RECORD</b> - Needs security backup - See remarks.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-05	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
10	MAINTENANCE HISTORY DOCUMENTATION - FACILITY AND PROPERTY MANAGEMENT Maintenance history for each building, which may include: Maintenance performed, work orders, purchase orders, copies of state and/or insurance companies inspection reports.	OFM	Life, sale, or disposition of the facility	Destroy when obsolete or superseded	GS50-06B-06	
11	MAINTENANCE LOGS - FACILITY AND PROPERTY MANAGEMENT	OFM	Destroy when superseded plus 3 years	Destroy when obsolete or superseded	GS50-06B-07	
12	MAINTENANCE REPORTS - FACILITY AND PROPERTY MANAGEMENT	OFM	1 year	Destroy when obsolete or superseded	GS50-06B-08	
13	OPERATING MANUALS - FACILITY AND PROPERTY MANAGEMENT Prepared by contractors for use of the agency in maintaining equipment installed in buildings. <b>ESSENTIAL RECORD</b> - Needs security backup - See remarks.	OFM	Disposition or sale of facility or equipment	Destroy when obsolete or superseded	GS50-06B-09	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
14	OPERATING PERMITS - FACILITY AND PROPERTY MANAGEMENT For boilers and elevators.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06B-10	
15	VANDALISM REPORTS - FACILITY AND PROPERTY MANAGEMENT	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-11	
16	VISITOR LOGS - FACILITY AND PROPERTY MANAGEMENT	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-12	
17	WORK ORDERS - FACILITY AND PROPERTY MANAGEMENT Request for performance of maintenance work, may show location, date of request, work to be performed, etc.	OFM	3 years	Destroy when obsolete or superseded	GS50-06B-13	

**Schedule Title: LAND OWNERSHIP AND ACCESS RIGHTS - AGENCY OWNED PROPERTY**

**DISPOSITION AUTHORITY GS55-05A**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		



**Schedule Title: LAND OWNERSHIP AND ACCESS RIGHTS - AGENCY OWNED PROPERTY**

**DISPOSITION AUTHORITY GS55-05A**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	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	GS55-05A-01	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	DEEDS/TITLES Legal documents of ownership	OPR	County auditor or recorder - PERMANENT	Sale or disposal of land plus 10 years - <b>See remarks</b>	GS55-50A-02	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 - <b>See remarks</b>	GS55-50A-03	Additional copies may be disposed of when obsolete or superseded.
4	ENCROACHMENTS Documentation of conflicts on land or water rights and obligations. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks</b> .	OPR	Closure of dispute plus 10 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-50A-04	The county auditor records selected records in this series. Reference RCW 4.16.020 for retention period. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
5	EVICTON RECORDS Eviction records, legal eviction files.	OPR	6 years after judgment or final decisions	Destroy when obsolete or superseded	GS55-05A-09	
6	LAND INFORMATION FILES General reference files on acquisition of land; condemnation proceedings, title info: i.e. location, size, value, etc. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks</b> .	OFM	Disposition of land plus 10 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-50A-06	Reference RCW 4.16.020 for retention period. Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
7	LEASES Official documentation of leases for property leased by and from other parties and agency property leased to the public.	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS55-50A-07	

SUPERSEDED

**Schedule Title: LAND OWNERSHIP AND ACCESS RIGHTS - AGENCY OWNED PROPERTY**

**DISPOSITION AUTHORITY GS55-05A**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
8	RIGHT OF WAY VACATION FILES Documentation of process of relinquishing road, street, alley, and other rights of way owned by the agency. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OFM	Approval by governing council, commission, or board plus 10 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-50A-08	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## GOVERNING COUNCILS, COMMISSIONS AND BOARDS

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for other copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

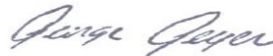
**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## GOVERNING COUNCILS, COMMISSIONS, AND BOARDS - INCLUSIVE Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

Schedule Title: GOVERNING COUNCILS, COMMISSIONS AND BOARDS

DISPOSITION AUTHORITY GS50-05A

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	AFFIDAVIT OF MAILING, POSTING, AND PUBLICATION OF PUBLIC NOTICES	OPR	6 years	Destroy when obsolete or superseded	GS50-05A-20	
2	AGENCY CHARTERS Official, adopted charter defining scope of the agency and its rights, responsibilities, and authority.  <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks</b> .	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-01	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
3	AGENDA REQUESTS	OFM	3 years	Destroy when obsolete or superseded	GS50-05A-02	
4	AGENDAS/BRIEFS/PACKETS Council, Commission, or Board Member Agendas/Briefs/Packets	OFM	3 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-03	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	ANNUAL REPORTS ADOPTED May also include annual messages of chief executive officer.	OPR	PERMANENT as adopted - 1 copy archival - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-04	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	APPOINTMENTS OF COUNCIL MEMBERS, COMMISSIONERS, BOARD MEMBERS, DEPARTMENT HEADS, OR OTHER AGENCY OFFICIALS	OPR	PERMANENT (in council, commission, or board minutes)	Destroy when obsolete or superseded	GS50-05A-05	
7	AUDIO/VIDEO RECORDINGS OF OFFICIAL PROCEEDINGS Magnetic sound or video recording of governing council, commission, or board proceedings which may be used to prepare minutes.	OPR	6 years OR 1 year if transcribed, and transcription is approved – <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-06	Due to the limited life span of magnetic recordings, this records series cannot serve as a permanent record of the official proceedings. Verbatim accounts of meetings are often required as evidence in court proceedings involving decisions, which result in ordinances, resolutions, or official policy.
8	CHARTER HISTORY FILES Includes past, current, and proposed charters which will provide background and historical reference for county charter review.	OFM	Agency option - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-07	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

Schedule Title: GOVERNING COUNCILS, COMMISSIONS AND BOARDS

DISPOSITION AUTHORITY GS50-05A

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
9	FRANCHISES  <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	Termination or withdrawal plus 6 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-10	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
10	GOALS & OBJECTIVES WORKING FILE	OFM	3 years	Destroy when obsolete or superseded	GS50-05A-11	
11	INDEXES TO MINUTES, ORDINANCES, AND RESOLUTIONS  <b>ESSENTIAL RECORD</b> – Needs security microfilm backup - <b>See remarks.</b>	OFM	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-12	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
12	MINUTES OF OFFICIAL PROCEEDINGS APPROVED AND SIGNED Includes all referenced and attached documents.  <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-13	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
13	OATHS OF OFFICE  <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-05A-15	This records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

Schedule Title: GOVERNING COUNCILS, COMMISSIONS AND BOARDS

DISPOSITION AUTHORITY GS50-05A

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
14	ORDINANCES AND RESOLUTIONS <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-16	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
15	PETITIONS TO THE COUNCIL, COMMISSION, OR BOARD	OPR	6 years	Destroy when obsolete or superseded	GS50-05A-17	
16	RECORDS OF PUBLIC HEARINGS May include verbatim agenda, minutes, transcripts, speaker sign up, written testimony, and official notices. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-18	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. The information in this records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.
17	SUB-COMMITTEE MINUTES/REPORTS	OPR	6 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-08	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
18	TRANSCRIPTIONS OF AUDIO/VIDEO TAPES OF OFFICIAL PROCEEDINGS	OPR	6 years – Potential archival value – <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-21	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## HAZARDOUS MATERIALS ADMINISTRATION

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys (see *Documenting Records Destruction, page 13*). An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, the retention period for the other agency/office's copy will be highlighted in these schedules.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## HAZARDOUS MATERIALS ADMINISTRATION- INCLUSIVE

Approved by the Washington State Local Records Committee - July, 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

Schedule Title: HAZARDOUS MATERIALS ADMINISTRATION

DISPOSITION AUTHORITY GS50-19

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	GENERATOR ANNUAL DANGEROUS WASTE REPORT – HAZARDOUS MATERIALS ADMINISTRATION (To Department of Ecology) summary of hazardous waste removal. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-02	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
2	HAZARDOUS MATERIALS ABATEMENT PROJECT FILE Includes records of asbestos removal, underground storage tank removal, and other large-scale hazardous material removal. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-10	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
3	HAZARDOUS MATERIALS ACCIDENT/INCIDENT REPORT Description of accident and cleanup. Includes information on personal exposure. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-03	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
4	HAZARDOUS MATERIALS CERTIFICATE OF DESTRUCTION <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-04	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
5	HAZARDOUS MATERIALS DISPOSAL RECORDS Documentation of hazardous materials disposed of by the agency. May include used oil, car parts, etc. <b>ESSENTIAL RECORD</b> – Needs security microfilm backup – <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-12	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.



Schedule Title: HAZARDOUS MATERIALS ADMINISTRATION

DISPOSITION AUTHORITY GS50-19

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
6	HAZARDOUS MATERIALS EMPLOYEE RIGHT TO KNOW IMPLEMENTATION PLAN <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-19-05	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
7	HAZARDOUS MATERIALS INSPECTION AND TEST REPORTS <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-06	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
8	HAZARDOUS MATERIALS INVENTORY SHEET List of chemicals and other hazardous materials present in each work area. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-07	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
9	HAZARDOUS MATERIALS MANAGEMENT PLAN <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-08	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
10	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. <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-09	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.
11	MATERIALS SAFETY DATA SHEET (MSDS). <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	30 years	Destroy when obsolete or superseded	GS50-19-11	Please reference WAC 296-62-05207. This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
12	NOTIFICATION OF DANGEROUS WASTE ACTIVITY – HAZARDOUS MATERIALS ADMINISTRATION.	OPR	Destroy when superseded or when item is no longer on hand	Destroy when obsolete or superseded	GS50-19-13	

SUPERSEDED

Schedule Title: HAZARDOUS MATERIALS ADMINISTRATION

DISPOSITION AUTHORITY GS50-19

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
13	PHYSICAL EXAMINATION REPORTS FOR EMPLOYEES EXPOSED TO HAZARDOUS MATERIALS <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	50 years	Destroy when obsolete or superseded	GS50-19-01	This records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards. NOTE: There is no limitation of action on the agency's liability for the exposure of individuals to hazardous materials.

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## HOME HEALTH AND HOME HOSPICE CARE

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## HOME HEALTH AND HOME HOSPICE CARE - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: HOME HEALTH AND HOME HOSPICE CARE**

**DISPOSITION AUTHORITY GS55-03X**

SERIE S NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
3	EQUIPMENT MAINTENANCE RECORDS For equipment used in patient's home.	OPR	10 years after equipment has been taken out of service in patient's home	Destroy when obsolete or superseded	GS55-03X-01	
4	HOME HEALTH AND HOSPICE CARE LICENSES	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-03X-02	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## HOSPITAL LICENSING AND REGULATION

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## HOSPITAL LICENSING AND REGULATION - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: HOSPITAL LICENSING AND REGULATION**

**DISPOSITION AUTHORITY GS55-03V**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	CONDITIONS OF PARTICIPATION SURVEY Covers Ambulatory Surgical Center, Home Health and Home Hospice and Long Term Care.	OPR	6 years after approval or certification - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03V-01	Reference RCW 70.41, WAC 246-318. Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	HOSPITAL LICENSE	OPR	PERMANENT - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03V-02	Reference RCW 70.41, WAC 246-318.
3	ON SITE LICENSING SURVEY	OPR	6 years after approval or certification - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03V-03	Reference RCW 70.41, WAC 246-318. Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
4	RESPONSES TO DEFICIENCIES Covers Ambulatory Surgical Center, Home Health and Home Hospice and Long Term Care.		6 years after approval or certification - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03V-04	Reference RCW 70.41, WAC 246-318. Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## HOUSEKEEPING AND LAUNDRY

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## HOUSEKEEPING AND LAUNDRY - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: HOUSEKEEPING AND LAUNDRY**

**DISPOSITION AUTHORITY GS55-03F**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	DAILY REPORT OF LINEN LAUNDERED For each department.	OFM	3 years	Destroy when obsolete or superseded	GS55-03F-01	
2	DAILY WORK SCHEDULES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS55-03F-02	
3	INVENTORY OF LINENS DISCARDED	OFM	3 years	Destroy when obsolete or superseded	GS55-03F-03	
4	NEW LINEN DISTRIBUTION LISTINGS	OFM	3 years	Destroy when obsolete or superseded	GS55-03F-04	
5	RECORD OF NEW LINEN PURCHASES	OPR	6 years	Destroy when obsolete or superseded	GS55-03F-05	

**SUPERSEDED**



# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## IMAGING SERVICES

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## IMAGING SERVICES - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: IMAGING SERVICES**

**DISPOSITION AUTHORITY GS55-03L**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	AIR SAMPLING SURVEY RECORDS	OPR	Termination of pertinent license or permit plus 30 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-01	Reference WAC 246-221-230 (7) (g).
2	BRACHYTHERAPY AND SEALED BYPRODUCT SOURCE LEAKAGE TEST REPORTS	OFM	5 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-02	Reference 10 CFR 35.53 (d).
3	BRACHYTHERAPY SOURCE RECORDS AND RADIATION SURVEY RECORDS Used to confirm placement within patient.	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-03	Reference 10 CFR 35.406 (d).
4	BYPRODUCT (UNSEALED) MEASUREMENT OF DOSES	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-04	Reference 10 CFR 35.53 (c).
5	BYPRODUCT MATERIAL CONTAMINATION AND AMBIENT RADIATION EXPOSURE RATE SURVEYS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-05	Reference 10 CFR 35.53 (c).
6	BYPRODUCT MATERIAL MEDICAL USE LICENSES	OPR	Permanent - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-06	Reference 10 CFR 35.11.
7	BYPRODUCT MATERIAL RECORDS OF DISPOSAL	OPR	Until termination of Nuclear Regulatory Commission Disposal License - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-07	Reference 10 CFR 30.51 (a) (3).
8	BYPRODUCT MATERIAL RECORDS OF RECEIPT	OPR	3 years after disposal or transfer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-08	Reference 10 CFR 30.51 (a) (1).
9	BYPRODUCT MATERIAL RECORDS OF TRANSFER Includes manifests and acknowledgments of receipt.	OPR	3 years after transfer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-09	Reference 10 CFR 30.51 (a) (2) and WAC 246-249-090 (4) (g).
10	DIAGNOSTIC RADIOLOGY EQUIPMENT SPECIFICATIONS AND ACCEPTANCE TESTING RECORDS	OFM	Life of equipment - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-10	Reference 21 CFR 1000.55 (c) (2).
11	ECHOCARDIOGRAPH - ABNORMAL READINGS Tape of visual tests.	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-11	Primary copy held in Patient Case File in Medical Records.
12	ECHOCARDIOGRAPH - NORMAL READINGS Tape of visual tests.	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-12	Primary copy held in Patient Case File in Medical Records.
13	ECHOCARDIOGRAPH INTERPRETATION Interpretation by physician.	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-13	Primary copy held in Patient Case File in Medical Records.
14	ELECTROCARDIOGRAMS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-14	Primary copy held in Patient Case File in Medical Records.
15	ELECTROENCEPHALOGRAMS Interpretation by neurologist.	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-15	Primary copy held in Patient Case File in Medical Records.
16	ELECTROENCEPHALOGRAM NORMAL TRACINGS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-16	Primary copy held in Patient Case File in Medical Records.
17	EQUIPMENT INSPECTIONS AND TESTS	OFM	3 years	Destroy when obsolete or superseded	GS55-03L-17	

**Schedule Title: IMAGING SERVICES**

**DISPOSITION AUTHORITY GS55-03L**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
18	HIGH RADIATION AREA ENTRY CONTROL DEVICE TEST RECORDS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-18	Reference WAC 246-221-230 (9) (a).
19	IMAGE RECEPTOR CALIBRATION INSTRUCTIONS	OFM	Life of equipment	Destroy when obsolete or superseded	GS55-03L-19	
20	IMAGE RECEPTOR CALIBRATION MEASUREMENTS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-20	Reference 10 CFR 35.51 (d), WAC 246-240-040 (5) (a) and WAC 246-221-230 (9) (d).
21	IMAGE RECEPTOR MAINTENANCE LOGS Document corrective actions and compliance with applicable requirements.	OFM	3 years after last entry - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-21	Reference 21 CFR 900.12.
22	IMAGE RECEPTOR SPOT CHECK MEASUREMENTS AND CORRECTIVE ACTION RECORDS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-22	Reference 10 CFR 35.632.
23	IMAGING SERVICES PROGRAM STATEMENT Written description of program type and scope for nuclear medicine and other diagnostic and therapeutic imaging services offered by the hospital.	OPR	PERMANENT - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-23	Reference WAC 246-318-380 (1) (b).
24	INDIVIDUAL RADIATION RADIOACTIVE MATERIAL INTAKE MEASUREMENTS AND CALCULATION RESULTS USED FOR ASSESSMENT OF INTERNAL RADIATION DOSES	OPR	30 years after termination of license or registration - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-24	Reference WAC 246-221-230 (7) (f).
25	INTERPRETATION REPORTS (AUTHENTICATED)	OPR	Patient treatment file - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-25	Reference WAC 246-318-380 (5) (b).
26	LABORATORY AND INJECTION AREA SURVEYS	OFM	2 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-26	Reference WAC 246-239-070.
27	MEDICAL THERAPY DEVICE AND SOURCE INVENTORY Quarterly physical inventory of all devices and sources received and held. Inventories are inspected by the State Department of Health.	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-27	Reference WAC 246-240-020.
28	MOBILE NUCLEAR MEDICINE SURVEYS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-28	Reference 10 CFR 35.80 (e).
29	MOLYBDENUM 99 CONCENTRATION MEASUREMENTS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-29	Reference 10 CFR 35.204 (c).
30	MONTHLY RADIATION SURVEY OF HOT LAB, TREATMENT, WORKING, RECEPTION	OFM	3 years	Destroy when obsolete or superseded	GS55-03L-30	
31	MONTHLY TREATMENT STATISTICS	OFM	2 years	Destroy when obsolete or superseded	GS55-03L-31	
32	NUCLEAR IMAGE FILES	OPR	10 years after last treatment or 3 years after patient turns age 18, whichever is longer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-32	Reference RCW 70.41.190.

SUPERSEDED

**Schedule Title: IMAGING SERVICES**

**DISPOSITION AUTHORITY GS55-03L**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
33	NUCLEAR MEDICINE ANNUAL ACCURACY TESTS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-33	Reference 10 CFR 35.50 (e) and WAC 246-239-090.
34	NUCLEAR MEDICINE DOSE CALIBRATION DAILY CONSTANCY CHECKS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-34	Reference 10 CFR 35.50 (e) and WAC 246-239-090.
35	NUCLEAR MEDICINE QUARTERLY LINEARITY TESTS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-35	Reference 10 CFR 35.50 (e) and WAC 246-239-090.
36	OCCUPATIONAL AND PUBLIC RADIATION DOSE AND EXPOSURE HISTORY RECORDS Official documentation of external doses, internal doses, planned special exposures, accidents, and emergency conditions. Prepared on forms RHF-4, RHF-4A, RHF 5, and RFH 5A or other currently specified forms.	OPR	30 years after termination of license or registration - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-36	Reference 10 CFR 20.2104, WAC 246-221-230 (7) (b) and WAC 246-221-230 (7) (c).
37	OCCUPATIONAL AND PUBLIC RADIATION DOSE AND EXPOSURE HISTORY REPORT WORKING FILES Information used to compile Occupational Dose and Exposure History Reports.	OFM	3 years after completion of report - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-37	Reference 10 CFR 20.2104 and WAC 246-221-230 (9) (b).
38	OCCUPATIONAL AND PUBLIC RADIATION DOSE EQUIVALENT CALCULATIONS	OPR	30 years after termination of license or registration - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-38	Reference WAC 246-221-230 (7).
39	OCCUPATIONAL AND PUBLIC RADIATION DOSE MEASUREMENT AND CALCULATION DATA	OPR	30 years after termination of license or registration - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-39	Reference WAC 246-221-230 (7) (f).
40	OCCUPATIONAL AND PUBLIC RADIATION DOSE SURVEY RESULTS	OPR	30 years after termination of license or registration - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-40	Reference WAC 246-221-230 (7) (e).
41	PATIENT LOG OR REGISTER	OFM	Until disposition of last patient file listed - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-41	Reference WAC 246-318-380 (5) (e).
42	PUBLIC RADIATION DOSE RECORDS Documentation of dosages administered to individuals.	OPR	Until termination of license or registration- <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-42	Reference 246-221-230 (8) (b).
43	RADIATION DOSAGE RECORD Record of administration of doses for which written directives are required.	OPR	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-43	Reference WAC 246-240-015.
44	RADIATION GENERAL AND PACKAGE SURVEY RESULTS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-44	Reference WAC 246-221-110 and WAC 246-221-230 (9) (c).
45	RADIATION LEVEL TESTS AND CHARTS	OFM	3 years	Destroy when obsolete or superseded	GS55-03L-45	
46	RADIATION MACHINE FACILITY REGISTRATION FILE	OPR	Termination of registration plus 6 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-46	Reference WAC 246-244-001.
47	RADIATION PROTECTION PROGRAM AUDITS AND REVIEWS	OPR	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-47	Reference 10 CFR 20.2102 and WAC 246-221-230 (9) (e).

**Schedule Title: IMAGING SERVICES**

**DISPOSITION AUTHORITY GS55-03L**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
48	RADIATION PROTECTION PROGRAM PROVISIONS	OPR	Until termination of license or registration - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-48	Reference 10 CFR 20.2102 and WAC 246-221-230 (8) (c).
49	RADIATION SAFETY COMMITTEE MINUTES	OPR	2 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-49	Reference WAC 246-239-020.
50	RADIATION SOURCE RECORDS OF USE AND STORAGE	OPR	30 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-50	Reference WAC 246-220-020.
51	RADIATION THERAPY MISADMINISTRATION RECORDS	OPR	5 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-51	Reference WAC 246-240-050 (5).
52	RADIOACTIVE EFFLUENT RELEASE MEASUREMENTS AND CALCULATIONS	OFM	30 years after termination of pertinent license or permit - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-52	Reference 246-221-230 (7) (h).
53	RADIOACTIVE MATERIALS GENERAL AND SPECIFIC LICENSES	OPR	PERMANENT - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-53	Reference WAC 246-232.
54	RADIOACTIVE PACKAGE SURVEY RESULTS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-54	Reference WAC 246-221-160 and WAC 246-221-230 (9) (c).
55	RADIOACTIVE WASTE DISPOSAL SITE USE PERMIT	OPR	6 years after termination - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-55	Reference WAC 246-249-020.
56	RADIOPHARMACEUTICAL ASSAY RESULTS	OFM	2 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-56	Reference WAC 246-239-040.
57	RADIOPHARMACEUTICAL DOSAGE HISTORY Record of dosage required for each patient.	OFM	Until disposition of Patient File	Destroy when obsolete or superseded	GS55-03L-57	
58	RADIOPHARMACEUTICAL MISADMINISTRATION RECORDS	OPR	5 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-58	Reference WAC 246-239-025.
59	RADIOPHARMACEUTICAL OR PERMANENT IMPLANT PATIENT RELEASE RECORDS	OPR	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-59	Reference 10 CFR 35.75 (c).
60	RADIOPHARMACEUTICAL REQUISITION	OPR	6 years	Destroy when obsolete or superseded	GS55-03L-60	
61	RESTRICTED AREA EMPLOYEE WORKING INSTRUCTIONS Inspected by State Department of Health.	OPR	PERMANENT - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-61	Reference WAC 246-222-030 (2).
62	ROENTGENOGRAMS AND NEGATIVE CHEST FILMS	OPR	10 years after last treatment or 3 years after patient turns age 18, whichever is longer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-62	Reference RCW 70.41.190.
63	SAFETY INSTRUCTIONS – LIST OF PERSONNEL RECEIVING Covers personnel caring for patients receiving brachytherapy, radiopharmaceutical therapy, and/or teletherapy.	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-63	Reference 10 CFR 35.310 (b), 10 CFR 410 (b) and 10 CFR 610 (c).
64	TELETERAPY CALIBRATION CALCULATIONS Includes calibration inter-comparisons and comparisons of dosimetry equipment for teletherapy.	OPR	Until termination of equipment license - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-64	Reference 10 CFR 35.630.

SUPERSEDED

**Schedule Title: IMAGING SERVICES**

**DISPOSITION AUTHORITY GS55-03L**

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65	TELETHERAPY FACILITY SAFETY CHECK REPORTS	OFM	3 years after installation - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-65	Reference 10 CFR 35.636.
66	TELETHERAPY LICENSEE'S EVALUATION OF QUALIFIED CALIBRATION EXPERT'S TRAINING AND EXPERIENCE	OPR	5 years after expert's performance of last full calibration of licensee's equipment- <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-66	Reference WAC 246-240-040 (5) (c).
67	TELETHERAPY SOURCE FULL CALIBRATION MEASUREMENTS Measurements made for each individual source used by the hospital.	OFM	Life of the equipment - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-67	Reference 10 CFR 35.632.
68	TELETHERAPY SOURCE INSTALLATION RADIATION MEASUREMENTS	OFM	Until termination of equipment license - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-68	Reference WAC 10 CFR 35.641 (d).
69	TELETHERAPY UNIT FIVE YEAR INSPECTION RECORDS	OPR	6 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03L-69	Reference 10 CFR 35.647.
70	WORK SCHEDULE	OFM	1 year	Destroy when obsolete or superseded	GS55-03L-70	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## IN-SERVICE EDUCATION AND TRAINING

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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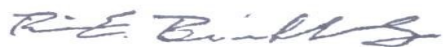
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## IN-SERVICE EDUCATION AND TRAINING - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: IN-SERVICE EDUCATION AND TRAINING****DISPOSITION AUTHORITY GS55-03G**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	CONFERENCE ROOM SCHEDULES OR CALENDARS	OFM	90days	Destroy when obsolete or superseded	GS55-03G-01	
2	PARTICIPANT LISTS	OFM	1 year	Destroy when obsolete or superseded	GS55-03G-02	
3	PARTICIPANT TIME SHEET	OFM	3 years	Destroy when obsolete or superseded	GS55-03G-03	
4	RECORD OF REQUIRED ANNUAL TRAINING FOR ALL DISTRICT EMPLOYEES Includes disaster preparedness, fire, infection control, and all other required training.	OPR	6 years	Destroy when obsolete or superseded	GS55-03G-04	

# SUPERSEDED



# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## INSTITUTIONAL REVIEW BOARD

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## INSTITUTIONAL REVIEW BOARD - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: INSTITUTIONAL REVIEW BOARD

DISPOSITION AUTHORITY GS55-03U

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	CONSENT DOCUMENTS, APPROVED	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-03U-01	
2	INJURY REPORTS Reports of injuries to subjects.	OPR	3 years – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03U-02	Reference 45 CFR 46.115.
3	INSTITUTIONAL REVIEW BOARD CORRESPONDENCE	OFM	3 years – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03U-03	Reference 45 CFR 46.115.
4	INSTITUTIONAL REVIEW BOARD MEMBERSHIP LISTS	OFM	3 years – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03U-04	Reference 45 CFR 46.115.
5	INSTITUTIONAL REVIEW BOARD MINUTES OF OFFICIAL PROCEEDINGS <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-05A-13	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.
6	INSTITUTIONAL REVIEW BOARD PROCEDURES <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-24	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.
7	INVESTIGATORS' REPORTS Also includes progress notes.	OPR	3 years – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03U-07	Reference 45 CFR 46.115.
8	RESEARCH PROPOSALS	OPR	3 years after completion – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03U-08	Reference 45 CFR 46.115.
9	REVIEW ACTIVITY FILES, CONTINUING	OPR	3 years – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03U-09	Reference 45 CFR 46.115.
10	STATEMENTS OF SIGNIFICANT NEW FINDINGS PROVIDED TO SUBJECTS	OPR	3 years – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03U-10	Reference 45 CFR 46.115.

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## INSURANCE/RISK MANAGEMENT/SAFETY

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

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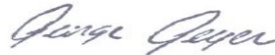
**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## INSURANCE/RISK MANAGEMENT SAFETY- INCLUSIVE

Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

Schedule Title: **INSURANCE/RISK MANAGEMENT**

**DISPOSITION AUTHORITY GS50-06C**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ACCIDENT/INCIDENT CLAIM LOGS, DEPT. OF LABOR AND INDUSTRIES	OFM	3 years	Destroy when obsolete or superseded	GS50-06C-01	
2	ACCIDENT/INCIDENT REPORTS - EMPLOYEES - INSURED BY AGENCY OR NOT REPORTABLE TO LABOR AND INDUSTRIES	OPR	For accidents/incidents involving adults NOT resulting in claims– 3 years For accidents/incidents involving adults resulting in claims– closure plus 6 years For accidents/incidents involving minors NOT resulting in claims– age of majority plus 3 years For accidents/incidents involving minors resulting in claims – closure plus 6 years	Destroy when obsolete or superseded	GS50-06C-02	<b>The Local Records Committee suggests that policies, which allow claims retroactive to their period of coverage, should be retained permanently.</b>  Consult your risk manager.
3	ACCIDENT/INCIDENT 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.	OPR	For accidents/ incidents involving adults NOT resulting in claims– 3 years For accidents/ incidents involving adults resulting in claims– closure plus 6 years For accidents/ incidents involving minors NOT resulting in claims - age of majority plus 3 years For accidents/ incidents involving minors resulting in claims – closure plus 6 years	Destroy when obsolete or superseded	GS50-06C-03	The Local Records Committee suggests that policies, which allow claims retroactive to their period of coverage, should be retained permanently.  Consult your risk manager.
4	AUDIOMETRIC TEST RECORDS	OFM	Retain for the duration of the affected employee's employment	Destroy when obsolete or superseded	GS51-05D-10	Please reference WAC 296-62-09041 (4b).
5	CERTIFICATES OF INSURANCE  <b>ESSENTIAL RECORD</b> – Needs security microfilm backup – <b>See remarks.</b>	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-06C-04	This records series should be protected from loss or damage by storage of a security microfilm backup at the State Archives. Security microfilm must meet Washington State Archives technical standards.

SUPERSEDED

**Schedule Title: INSURANCE/RISK MANAGEMENT**

**DISPOSITION AUTHORITY GS50-06C**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
6	CERTIFICATION OF EMPLOYER AS SELF-INSURER – INSURANCE / RISK MANAGEMENT / SAFETY	OFM	Department of Labor and Industries keeps primary copy - Termination plus 6 years	Keep until certification withdrawn or surrendered	GS50-06C-05	
7	COMPENSATION QUARTERLY REPORTS - INSURANCE / RISK MANAGEMENT / SAFETY	OFM	Department of Labor and Industries keeps primary copy - 6 years	3 years	GS50-06C-06	
8	DISASTER/EMERGENCY MANAGEMENT PLAN <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-06C-07	This records series should be protected from loss or damage by offsite storage of a security microfilm backup. Security microfilm must meet Washington State Archives technical standards.
9	FIDELITY AND SURETY COVERAGE BONDS	OPR	Termination of policy plus 6 years	Destroy when obsolete or superseded	GS50-06C-09	
10	FIRE & OTHER EMERGENCY DRILL REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06C-10	
11	FIRE ALARM APPLICATION	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-06C-11	
12	HOLD HARMLESS AGREEMENTS	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-06C-13	
13	INCIDENT REPORTS AND ACCIDENT CLAIMS FOR DAMAGES FILED AGAINST THE AGENCY BY OTHER PARTIES, AND BY THE AGENCY AGAINST OTHER PARTIES (CLAIMS MADE OR PER OCCURRENCE) Includes vehicle accidents.	OPR	For accidents/incidents involving adults NOT resulting in claims– 3 years For accidents/incidents involving adults resulting in claims– closure plus 6 years For accidents/incidents involving minors NOT resulting in claims– age of majority plus 3 years For accidents/incidents involving minors resulting in claims – closure plus 6 years	Destroy when obsolete or superseded	GS50-06C-14	
14	INSURANCE AND SAFETY INSPECTION REPORTS	OFM	Termination of policy plus 6 years	Destroy when obsolete or superseded	GS50-06C-18	
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	GS50-06C-15	

SUPERSEDED

**Schedule Title: INSURANCE/RISK MANAGEMENT**

**DISPOSITION AUTHORITY GS50-06C**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
16	INSURANCE POLICIES PURCHASED Includes accident, sickness, automobile, theft, fire liability, life, and all other insurance policies purchased by the agency.  <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OPR	Termination of policy plus 6 years	Destroy when obsolete or superseded	GS50-06C-16	The Local Records Committee suggests that policies, which allow claims retroactive to their period of coverage, should be retained permanently. Consult your risk manager. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
17	INSURANCE WAIVERS	OPR	6 years	Destroy when obsolete or superseded	GS50-06C-17	
18	LIABILITY WAIVERS	OPR	Expiration or completion of activity plus 6 years	Destroy when obsolete or superseded	GS50-06C-28	
19	MONTHLY STATEMENT OF BENEFITS PAID – INSURANCE / RISK MANAGEMENT / SAFETY	OPR	6 years	Destroy when obsolete or superseded	GS50-06C-19	
20	NOISE EXPOSURE REPORTS	OFM	2 years– <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06D-04	Please reference WAC 296-62-09041 (4a).
21	OCCUPATIONAL INJURIES AND ILLNESSES U.S. BUREAU OF LABOR STATISTICS LOG AND SUMMARY	OFM	5 years	Destroy when obsolete or superseded	GS50-06C-21	
22	REPORTS OR STATEMENTS OF CLAIMS COSTS Compilations of costs of processing claims against self-insured liabilities.	OFM	4 years	Destroy when obsolete or superseded	GS50-06C-24	
23	RESPIRATOR FIT TEST RECORDS	OFM	Retain until next test administered– <b>See remarks</b>	Destroy when obsolete or superseded	GS51-05D-07	Please reference WAC 296-62-07194 (3).
24	RESPIRATOR PROGRAM FILES	OFM	Destroy when obsolete or superseded– <b>See remarks</b>	Destroy when obsolete or superseded	GS51-05D-08	Please reference WAC 296-62-07194 (4).
25	RISK DATA Information compiled on the costs, liability for risks to which the agency is exposed, and the allocation of expense required to support the risk management program.	OFM	4 years	Destroy when obsolete or superseded	GS50-06C-25	
26	WORKER'S COMPENSATION AND EMPLOYEE LIABILITY CLAIMS	OFM	Department of Labor and Industries keeps primary copy - PERMANENT - <b>See remarks</b>	Last payment plus completion of State Auditor's examination report.	GS50-06C-27	NOTE: For self-insured entities, the primary file copy will be maintained at the office of the self-insured for 6 years from date of closure.
27	WORKPLACE HAZARD ASSESSMENT CERTIFICATION	OPR	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS51-05D-06	

**Schedule Title: SAFETY**

**DISPOSITION AUTHORITY GS51-05D**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	FACILITY SAFETY 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	GS50-06C-08	
2	FACILITY SAFETY HISTORY RECORDS Cumulative record showing inspection citations, corrections, and other information relating to continuing safety of each agency facility.	OFM	Life of facility	Destroy when obsolete or superseded	GS51-05D-01	
3	NOTIFICATION OF PENALTY ASSESSMENT – INSURANCE / RISK MANAGEMENT / SAFETY	OPR	6 years	Destroy when obsolete or superseded	GS50-06C-20	
4	REFERENCE AND INFORMATION MATERIALS RECEIVED FROM SAFETY AGENCIES Bulletins, pamphlets, notice.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS51-05D-04	
5	SAFETY COMMITTEE MINUTES	OFM	1 year– <b>See remarks</b>	Destroy when obsolete or superseded	GS51-05D-09	Please reference WAC 296-24-045 (4).
6	SAFETY INSPECTION, STATE NOTICE AND CITATION	OPR	6 years	Destroy when obsolete or superseded	GS51-05D-05	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## LABORATORY SERVICES

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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## LABORATORY SERVICES - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens



Schedule Title: LABORATORY SERVICES

DISPOSITION AUTHORITY GS55-03H

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	HEMATOLOGY AND CYTOLOGY REPORTS – ABNORMAL RESULTS	OFM	10 years after examination – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03H-01	Reference WAC 246-338-070.
2	HEMATOLOGY AND CYTOLOGY REPORTS – NEGATIVE RESULTS	OFM	10 years after examination – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03H-02	Reference WAC 246-338-070.
3	INSTRUMENT LOGS	OFM	Life of instrument	Destroy when obsolete or superseded	GS55-03H-03	
4	LABORATORY JOURNAL, ACCESSION LOG, APPOINTMENT BOOK	OFM	3 years	Destroy when obsolete or superseded	GS55-03H-04	
5	QUALITY CONTROL TESTS	OFM	For transfusion services: 5 years – <b>See remarks</b> For all other services: 3 years	Destroy when obsolete or superseded	GS55-03H-05	Reference WAC 246-338-070 (1); (2).
6	REQUESTS FOR TESTS	OFM	For transfusion services: 5 years – <b>See remarks</b> For all other services: 2 years	Destroy when obsolete or superseded	GS55-03H-06	Reference WAC 246-338-070 (1); (2).
7	TEST RESULTS, LAB REPORTS Including outpatient reports.	OFM	For transfusion services: 5 years – <b>See remarks</b> For all other services: 2 years	Destroy when obsolete or superseded	GS55-03H-07	Reference WAC 246-338-070 (1); (2). Primary copy in Medical Records.

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## LEGAL COUNSEL

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## LEGAL COUNSEL- INCLUSIVE

Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

**Schedule Title: LEGAL COUNSEL**

**DISPOSITION AUTHORITY GS53-02**

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

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## LONG TERM CARE FACILITIES

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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## LONG TERM CARE FACILITIES - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: LONG TERM CARE FACILITIES**

**DISPOSITION AUTHORITY GS55-03R**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1.	DIALYSIS SERVICES AGREEMENTS	OPR	6 years after termination– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-01	Reference WAC 388-97-220 (6) (a).
2.	DISASTER PREPAREDNESS PLANS  <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-02	Reference 42 CFR 483.75 (m). 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.
3.	DRUG THERAPY CONTINUITY RECORDS Case history of drug therapy for individual residents.	OPR	10 years after termination of residency– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-03	Reference WAC 246-865-070 (4).
4.	EMERGENCY KIT DRUG RECEIPT AND REMOVAL RECORDS	OPR	6 years– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-04	Reference WAC 246-865-030 (4).
5.	LONG TERM CARE FACILITY LICENSE	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-03R-05	
6.	NAMES OF PERSONS SEEKING ADMISSION REGISTER	OFM	1 year after last entry– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-06	Reference WAC 388-97-230 (6).
7.	NOTICE TO RESIDENTS OF LEGAL RIGHTS AND SERVICES	OPR	10 years after termination of residency or 3 years past age of majority, whichever is longer– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-07	Reference WAC 388-97-070 (4) (a); (h).
8.	RESIDENT MINIMUM DATA SETS	OPR	10 years after termination of residency or 3 years past age of majority, whichever is longer– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-08	Reference 42 CFR 483.20 and WAC 388-97-275.
9.	SCHEDULE II AND SCHEDULE III DRUG RECORD BOOK	OPR	6 years after last entry– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-09	Reference WAC 246-865-060 (6) (c).
10.	TRANSFER AGREEMENTS WITH HOSPITALS APPROVED FOR PARTICIPATION UNDER MEDICARE AND MEDICAID PROGRAMS	OPR	6 years after termination– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-10	Reference 42 CFR 483.75 (n).
11.	TUBERCULOSIS TESTS FOR EMPLOYEES	OPR	6 years after termination of employment– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-11	Reference WAC 388-97-145.
12.	TUBERCULOSIS TESTS FOR RESIDENTS	OPR	10 years after termination of residency or 3 years past age of majority, whichever is longer– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03R-12	Reference WAC 388-97-145.

\*Long Term Care records will be subject to other sections of the Public Hospital District General Records Retention Schedules according to the types of services offered within this program.

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## MAIL SERVICES

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.


**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## MAIL SERVICES- INCLUSIVE

Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

**Schedule Title: MAIL SERVICES**

**DISPOSITION AUTHORITY GS50-06D**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	BULK MAILING PERMIT	OPR	6 years	Destroy when obsolete or superseded	GS50-06D-01	
2	CERTIFIED AND REGISTERED MAIL LOG	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-02	
3	CERTIFIED MAIL RETURN RECEIPT	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-03	
4	POSTAGE EXPENDITURE REPORT	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-04	
5	POSTAGE METER LICENSE	OPR	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-06D-05	
6	POSTAGE METER LOG	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-06	
7	SENDERS STATEMENT AND CERTIFICATION OF BULK MAILING	OFM	3 years	Post office has other copies	GS50-06D-07	
8	UPS REGISTER	OFM	3 years	Destroy when obsolete or superseded	GS50-06D-08	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## MEDICAL RECORDS

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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


**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## MEDICAL RECORDS - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens



**Schedule Title: MEDICAL RECORDS**

**DISPOSITION AUTHORITY GS55-031**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ADMISSIONS, DISCHARGE AND TRANSFER MONTHLY REPORT	OFM	3 years	Destroy when obsolete or superseded	GS55-031-01	
2	BIRTH ROOM RECORDS Listings of maternity cases.	OFM	3 years	Destroy when obsolete or superseded	GS55-031-02	
3	DISCHARGE REPORT	OFM	3 years	Destroy when obsolete or superseded	GS55-031-03	
4	EMERGENCY ROOM REPORTS <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OPR	10 years after last discharge or 3 years after patient turns age 18, whichever is longer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-031-04	Reference RCW 70.41.190. Should be protected from damage or loss by off site storage of backup tapes. In non-automated systems, security copies should be stored off site, or the natural dispersal of copies inside and outside the agency should be documented.
5	FETAL MONITOR TAPES	OPR	3 years after patient turns age 18 - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-031-05	Reference RCW 70.41.190.
6	INDICES TO PATIENT MEDICAL RECORDS/MEDICAL RECORDS DATABASE <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OFM	PERMANENT	Destroy when obsolete or superseded	GS55-031-06	Should be protected from damage or loss by off site storage of backup tapes. In non-automated systems, security copies should be stored off site, or the natural dispersal of copies inside and outside the agency should be documented.
7	PATIENT CASE FILES Comprehensive patient treatment history, including all types of tests, reports, diagnosis, accounts of treatments, and recovery. Includes case files patients receiving Ambulatory Surgical Center, Home Health and Home Hospice, Long Term Care and Laboratory services. <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OPR	10 years after last discharge or 3 years after patient turns age 18, whichever is longer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-031-07	Reference RCW 70.41.190. <b>The Washington State Supreme Court decision re: DeYoung</b> has voided limitations of action and discovery previously provided by RCW 4.16.350. Contact your legal counsel and insurance provider for guidance on minimum retention policy for this records series. The Washington State Medical Association recommends 10 years after last visit, 20 years after last treatment of pregnant women and infants or 5 years after patient's death, whichever is longest.  Should be protected from damage or loss by off site storage of backup tapes. In non-automated systems, security copies should be stored off site, or the natural dispersal of copies inside and outside the agency should be documented.

SUPERSEDED

**Schedule Title: MEDICAL RECORDS****DISPOSITION AUTHORITY GS55-03I**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
8	PATIENT TREATMENT LOGS	OFM	3 years	Destroy when obsolete or superseded	GS55-03I-08	

# SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## MEDICAL STAFF

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## MEDICAL STAFF - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: MEDICAL STAFF

DISPOSITION AUTHORITY GS55-03J

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	CREDENTIALS COMMITTEE MINUTES <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03A-13	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	DEPARTMENTAL STAFF COMMITTEE MINUTES	OFM	3 years	Destroy when obsolete or superseded	GS55-03J-02	
3	DOCTOR'S PERSONNEL FILE Documentation on each doctor practicing at the hospital.	OPR	6 years after termination of practice at district hospital	Destroy when obsolete or superseded	GS55-03J-03	
4	MEDICAL STAFF BYLAWS <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-24	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.
5	MEDICAL STAFF EXECUTIVE COMMITTEE MINUTES <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03A-13	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.
6	MEDICAL STAFF RULES AND REGULATIONS <b>ESSENTIAL RECORD</b> - Needs security microfilm backup - <b>See remarks.</b>	OPR	PERMANENT - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-24	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.

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## MORGUE

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## MORGUE - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: MORGUE

DISPOSITION AUTHORITY GS55-03A

SERIE S NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	AUTOPSY AUTHORIZATIONS, POST MORTEM	OPR	10 years	Destroy when obsolete or superseded	GS55-03A-01	
2	AUTOPSY REPORTS	OFM	10 years	Destroy when obsolete or superseded	GS55-03A-02	
3	DECEASED PERSONAL PROPERTY REPORT	OPR	6 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03A-03	Reference RCW 68.50.040. One copy is certified by the county coroner/ medical examiner and filed with the county auditor.

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE - INCLUSIVE Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

**Schedule Title: MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE**

**DISPOSITION AUTHORITY GS50-06E**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ACCIDENT LOGS - MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE	OFM	6 years after last entry	Destroy when obsolete or superseded	GS50-06E-13	
2	BILLING TO OTHER AGENCIES FOR USE OF VEHICLES AND EQUIPMENT	OPR	6 years	Destroy when obsolete or superseded	GS50-06E-01	
3	CERTIFICATES OF VEHICLE TITLE - MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE	OPR	Until disposition of vehicle and completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-06E-02	
4	EQUIPMENT AND VEHICLE CHECKOUT LOG	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-03	
5	EQUIPMENT AND VEHICLE DATA AND STATISTICAL REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-04	
6	EQUIPMENT AND VEHICLE LEASES	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-06E-05	
7	EQUIPMENT AND VEHICLE MAINTENANCE AND HISTORY FILES Includes original defect and inspection report.	OFM	Until disposal or sale of equipment or vehicle	Destroy when obsolete or superseded	GS50-06E-06	
8	EQUIPMENT AND VEHICLE MAINTENANCE REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-20	
9	EQUIPMENT AND VEHICLE SAFETY ANALYSIS AND INVESTIGATION FILES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-06E-14	
10	EQUIPMENT AND VEHICLE SALE AND SALVAGE RECORD	OPR	6 years	Destroy when obsolete or superseded	GS50-06E-08	
11	EQUIPMENT AND VEHICLE USE REQUEST	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-09	
12	EQUIPMENT/VEHICLE PARTS ORDERS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-21	
13	FUEL PUMP/TANK AUDIT REPORTS - MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE	OFM	2 years	Destroy when obsolete or superseded	GS50-06E-15	
14	FUEL STORAGE FACILITY RECORDS - MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE Regulatory and operating records; receiving, dispersal, and inventory documentation including maintenance of facility.	OFM	3 years – Selected documents kept for life of facility	Destroy when obsolete or superseded	GS50-06E-16	
15	FUEL/OIL USAGE REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-10	
16	PARTS CONTROL FILES - MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE Record of vehicle parts in stock.	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-12	
17	PARTS INVENTORY, TRANSIT	OFM	3 years after obsolete or superseded	Destroy when obsolete or superseded	GS50-06E-17	



**Schedule Title: MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE**

**DISPOSITION AUTHORITY GS50-06E**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
18	PARTS MASTER LISTING REPORTS - MOTOR POOL, VEHICLE AND EQUIPMENT MAINTENANCE	OFM	3 years after obsolete or superseded	Destroy when obsolete or superseded	GS50-06E-18	
19	TIRE MAINTENANCE REPORTS	OFM	5 years	Destroy when obsolete or superseded	GS50-06E-19	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## NURSING

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## NURSING - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: NURSING**

**DISPOSITION AUTHORITY GS55-03K**

SERIE S NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	COMMITTEE MEETING MINUTES Minutes of meetings of committees on which the nursing staff is represented.	OFM	2 years	Destroy when obsolete or superseded	GS55-03K-01	
2	STAFF MEETING MINUTES	OFM	2 years	Destroy when obsolete or superseded	GS55-03K-02	
3	WORK SCHEDULES	OFM	3 years or until completion of State Auditor's examination report	Destroy when obsolete or superseded	GS50-04B-29	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## OPERATING ROOM

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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## OPERATING ROOM - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: OPERATING ROOM

DISPOSITION AUTHORITY GS55-03M

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	OPERATING/RECOVERY ROOM RECORD OR LOG	OFM	2 years	Destroy when obsolete or superseded	GS55-03M-01	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## PATHOLOGY

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## PATHOLOGY - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: **PATHOLOGY**

**DISPOSITION AUTHORITY GS55-03N**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	AUTOPSY BLOCKS	OFM	5 years	Destroy when obsolete or superseded	GS55-03N-01	
2	AUTOPSY SLIDES	OFM	10 years	Destroy when obsolete or superseded	GS55-03N-02	
3	REPORTS/BLOCKS	OFM	10 years	Destroy when obsolete or superseded	GS55-03N-03	
4	SLIDES/SURGICAL SLIPS	OFM	15 years	Destroy when obsolete or superseded	GS55-03N-04	
5	TEST LOG	OFM	5 years	Destroy when obsolete or superseded	GS55-03N-05	
6	TEST RESULTS	OFM	5 years - See remarks	Destroy when obsolete or superseded	GS55-03N-06	Primary copy held in Medical Records - Patient Case Files.

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## PERSONNEL

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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


**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## PERSONNEL - INCLUSIVE

Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs



Schedule Title: PERSONNEL - AFFIRMATIVE ACTION

DISPOSITION AUTHORITY GS50-04C

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	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	GS50-04C-01	
2	AFFIRMATIVE ACTION FORECASTS	OFM	2 years	Destroy when obsolete or superseded	GS50-04C-02	
3	AFFIRMATIVE ACTION PLANS <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks</b>	OPR	Keep until superseded plus 6 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-04C-03	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
4	AFFIRMATIVE ACTION STUDIES AND REPORTS	OFM	5 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-32	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	EQUAL EMPLOYMENT OPPORTUNITY COMPLAINTS AND CONCILIATIONS	OPR	Resolution plus 6 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-04C-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch subject to Equal Employment Opportunity rules and regulations.
6	EQUAL EMPLOYMENT OPPORTUNITY REPORTS	OFM	5 years	Destroy when obsolete or superseded	GS50-04C-05	

SUPERSEDED

Schedule Title: PERSONNEL - BENEFITS

DISPOSITION AUTHORITY GS50-04D

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	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	GS50-01-32	
2	EMPLOYEE BENEFIT CONTRACTS / POLICIES / PLANS Includes insurance, deferred compensation, health care, etc. <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OPR	Until superseded or coverage lapses plus 6 years	Destroy when obsolete or superseded	GS50-04D-02	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
3	EMPLOYEE BENEFIT PARTICIPATION / ENROLLMENT AGREEMENTS AND WITHDRAWALS <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OPR	Termination or withdrawal plus 6 years	Destroy when obsolete or superseded	GS50-04D-03	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
4	LISTING OF PARTICIPANTS COVERED BY AGENCY HEALTH INSURANCE PROVIDERS – EMPLOYEE BENEFITS Report submitted monthly to the agency by the provider.	OFM	3 years	Destroy when obsolete or superseded	GS50-04D-06	
5	MONTHLY STATEMENT OF EMPLOYEE BENEFITS PAID	OPR	6 years	Destroy when obsolete or superseded	GS50-04D-04	
6	UNEMPLOYMENT INSURANCE CLAIMS OF INDIVIDUAL EMPLOYEES	OPR	6 years	Destroy when obsolete or superseded	GS50-04D-05	

SUPERSEDED

**Schedule Title: PERSONNEL - EMPLOYEE RELATIONS**

**DISPOSITION AUTHORITY GS50-04E**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	COLLECTIVE BARGAINING AGREEMENTS <b>ESSENTIAL RECORD</b> - Needs security backup -- <b>See remarks.</b>	OPR	Termination plus 6 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-01-11	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
2	COLLECTIVE BARGAINING CONTRACT AND AGREEMENT NEGOTIATIONS FILES	OFM	Until approval of negotiated agreement - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-04E-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch subject to any restrictions provided by collective bargaining contracts and agreements.
3	GRIEVANCES AND APPEALS – PERSONNEL – EMPLOYEE RELATIONS	OPR	Resolution plus 6 years	Destroy when obsolete or superseded	GS50-04E-03	
4	UNION ARBITRATION FILES Case histories of disputes between agency and union settled through arbitration.	OPR	6 years	Destroy when obsolete or superseded	GS50-04E-06	
5	UNION ORGANIZATION LISTS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04E-05	

**Schedule Title: PERSONNEL - GENERAL**

**DISPOSITION AUTHORITY GS50-04B**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	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	GS50-04B-01	
2	CUMULATIVE LEAVE RECORD	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-02	
3	DRUG TEST RESULTS (AGENCY EMPLOYEES)	OPR	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-27	
4	EMPLOYEE & VOLUNTEER FINGERPRINT PROCESSING LIST Listings of newly hired employees fingerprinted for criminal background checks.	OPR	6 years	Destroy when obsolete or superseded	GS50-04B-11	

Schedule Title: PERSONNEL - GENERAL

DISPOSITION AUTHORITY GS50-04B

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
5	EMPLOYEE ASSISTANCE PROGRAM – SUPERVISOR REFERRAL DOCUMENTATION Documentation of referrals and completion of treatment by employees referred to the Employee Assistance Program by their supervisors to resolve work-related problems.	OPR	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-27	
6	EMPLOYEE ASSISTANCE PROGRAM FILES Quarterly reports, contracts, RFPs.	OFM	4 years	Destroy when obsolete or superseded	GS50-04B-19	
7	EMPLOYEE CONTRACTS – FINAL Includes riders issued.	OPR	6 years	Destroy when obsolete or superseded	GS50-04B-12	
8	EMPLOYEE CONTRACTS – SUPERSEDED Contracts superseded within fiscal year.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-13	
9	EMPLOYEE CORRECTIVE ACTION AND PROBATION DOCUMENTS	OPR	6 years after completion of probation or disciplinary action, or destroy according to the provisions of collective bargaining contracts and agreements	Destroy when obsolete or superseded	GS50-04B-15	
10	EMPLOYEE DIRECTORY/ROSTER	OFM	Destroy when obsolete or superseded – Potential archival value – <b>See remarks</b>	Destroy when obsolete or superseded	GS50-04B-14	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
11	EMPLOYEE HEALTH HISTORY FILES Documentation of physical examinations and tests, which verify that individual employees meet the physical condition requirements established in their terms of employment.	OPR	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-26	
12	EMPLOYEE HISTORY This record may be kept as part of item #37. May include all or some of the following: Details on employee application, start of employment, employment status, position description, job classification, evaluations, raises, criminal history and background checks, investigations, retirement or disability resulting in employment termination, and evaluation of applications of recognition of non-college credit courses. <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OFM	Termination plus 6 years – <b>See remarks</b>	Destroy when obsolete or superseded	GS50-04B-03	Retention may be subject to restrictions provided by collective bargaining contracts and agreements.  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 keeping a list that identifies the location of other copies inside and outside the agency.

SUPERSEDED

Schedule Title: PERSONNEL - GENERAL

DISPOSITION AUTHORITY GS50-04B

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
13	EMPLOYEE SUGGESTION PROGRAM FILES Original suggestion forms, evaluation forms, recommendation form, and correspondence to document and process employee suggestion files.	OFM	3 years after determination of suggestion	Destroy when obsolete or superseded	GS50-04B-20	
14	EMPLOYMENT INTERVIEW EVALUATION FILES Includes test results.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-16	
15	EMPLOYMENT REQUISITION / PERSONNEL ACTION REQUEST May contain position specifications, needs analysis, and authorization signatures.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-17	
16	HEPATITIS B VIRUS (HBV) AND HUMAN IMMUNODEFICIENCY VIRUS (HIV) EXPOSURE REPORTS AND WAIVERS <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OPR	Termination of employment plus 30 years	Destroy when obsolete or superseded	GS50-04B-04	Reference 29 CFR 1910.1020. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
17	IDENTIFICATION BADGE RECORDS FOR CONTRACT AND TEMPORARY EMPLOYEES Photo ID badges and supporting paperwork to track badges issued to contract and temporary employees.	OFM	1 year	Destroy when obsolete or superseded	GS50-04B-21	
18	JOB ANNOUNCEMENTS OR POSTINGS	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-18	
19	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 employment status, position description and job classification; citations; letters of recommendation; personal history cards. <b>ESSENTIAL RECORD</b> – Needs security backup – <b>See remarks.</b>	OFM	Termination plus 6 years- <b>See remarks</b>	Destroy when obsolete or superseded	GS50-04B-06	Retention may be subject to restrictions provided by collective bargaining contracts and agreements.  This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
20	POSITION CLASSIFICATION STUDIES Details on specific role and position of each job title, duties, obligations, etc.	OFM	Destroy when obsolete or superseded plus 6 years	Destroy when obsolete or superseded	GS50-04B-07	
21	POSITION DESCRIPTION HISTORY FILES	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-04B-08	

SUPERSEDED

Schedule Title: PERSONNEL - GENERAL

DISPOSITION AUTHORITY GS50-04B

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
22	RECRUITMENT FILES Documents recruitment and selection process for each advertised position, including newspaper announcement, job description, working papers/notes, applicant list, interview questions and notes, selection documents, and employee applications.	OFM	2 years	Destroy when obsolete or superseded	GS50-04B-22	
23	REQUESTS FOR LEAVE/OVERTIME	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-09	
24	SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILE	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04B-28	
25	TEMPORARY AGENCY WORKER ACCOUNTS Tracks temporary agency workers hired using original request forms moved to individual departments.	OFM	Termination of employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-23	
26	VOLUNTEER APPLICATIONS	OPR	Termination of volunteer employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-24	
27	VOLUNTEER FILES Document work history of individual volunteers as well as the agency's fulfillment of its responsibilities for each volunteer. <b>ESSENTIAL RECORD - Needs security backup - See remarks.</b>	OPR	Termination of volunteer employment plus 6 years	Destroy when obsolete or superseded	GS50-04B-10	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
28	WHISTLEBLOWER INVESTIGATION REPORTS Agency copies of investigations of allegations of fraud or violations of state laws or regulations.	OPR	Case closed plus 6 years	Destroy when obsolete or superseded	GS50-04B-25	
29	WORK ASSIGNMENT RECORD, SCHEDULE OR LOG Documentation of day-to-day tasks or projects assigned to and/or completed by individual staff or crews.	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-29	

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## PHARMACY

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

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**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## PHARMACY - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: PHARMACY

DISPOSITION AUTHORITY GS55-030

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		

\*Records series related to the administration of radiopharmaceuticals are covered in the IMAGING SERVICES schedule.

1	ALCOHOL INVENTORY AND ORDERS	OPR	6 years	Destroy when obsolete or superseded	GS55-030-01	
2	ANTINEOPLASTIC MEDICATIONS- DOCUMENTATION OF PERSONNEL TRAINED	OPR	30 years after termination of employment – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-02	Reference WAC 246-871-080 (1).
3	COMPLAINT FILES	OPR	2 years after distribution of drug has been completed or 1 year after expiration date of drug supply, whichever is longer– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-03	Reference WAC 246-895-160.
4	COMPOUNDING PRACTICES REPORTS Pertaining to implementation of best practices.	OFM	2 years– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-04	Reference WAC 246-878-120 (1), WAC 246-869-100.
5	CONTROLLED SUBSTANCES DISPENSING RECORD Bound record for dispensing controlled substances without prescriptions.	OFM	2 years after last entry– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-05	Reference 21 CFR 1306.26, 21 CFR 1034.04.
6	CONTROLLED SUBSTANCES EMERGENCY TRANSFER RECORDS	OFM	2 years– <b>See remarks</b>	Destroy when obsolete or superseded	<del>GS55-030-06</del>	Reference 21 CFR 1307.11 and WAC 246-887-020 (4) (d).
7	CONTROLLED SUBSTANCES RECEIPT AND DISTRIBUTION RECORDS	OFM	2 years– <b>See remarks</b>	Destroy when obsolete or superseded	<del>GS55-030-07</del>	Reference WAC 246-887-020 (4).
8	CONTROLLED SUBSTANCES SAMPLES DISTRIBUTION REPORTS Reports of samples distributed to licensed practitioners in Washington State.	OFM	2 years– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-08	Reference WAC 246-887-210.
9	CONTROLLED SUBSTANCES USE AND ACCOUNTABILITY RECORDS Drug destruction record.	OFM	2 years– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-09	Reference WAC 246-873-080 (7) (e) (iv).
10	DRUG DISTRIBUTION ERROR INCIDENT REPORTS	OPR	6 years– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-10	Reference WAC 246-873-080 (11).
11	HOME DIALYSIS PROGRAM - RECORD OF SHIPMENTS OF DRUGS	OFM	2 years after shipment – <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-11	Reference WAC 246-905-040 (1); (2) as per Washington Board of Pharmacy records retention requirements.
12	LABORATORY DATA RELATING TO EACH BATCH OF DRUG	OFM	2 years after distribution of drug has been completed or 1 year after expiration date of drug supply, whichever is longer– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-12	Reference WAC 246-895-150.
13	MECHANICAL FLOOR STOCK DEVICE CERTIFICATE OF LOCATION	OFM	2 years after removal or relocation of device– <b>See remarks</b>	Destroy when obsolete or superseded	GS55-030-13	Reference WAC 246-869-120 (12).



Schedule Title: PHARMACY

DISPOSITION AUTHORITY GS55-030

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
14	MECHANICAL FLOOR STOCK DEVICE RECORD OF REMOVAL Record of removal of drugs from the device.	OFM	2 years– See remarks	Destroy when obsolete or superseded	GS55-030-14	Reference WAC 246-869-120 (6).
15	MONTHLY INSPECTION OF HOSPITAL NURSING CARE UNITS WHERE MEDICATIONS ARE ADMINISTERED OR STORED	OFM	1 year– See remarks	Destroy when obsolete or superseded	GS55-030-15	Reference WAC 246-873-080 (1) (b).
16	PARENTERAL PRODUCTS OUT-PATIENT DISTRIBUTION SYSTEM DOCUMENTATION	OFM	2 years after last dispensing activity– See remarks	Destroy when obsolete or superseded	GS55-030-16	Reference 246-871-050 (2).
17	PARENTERAL PRODUCTS PATIENT WELFARE REPORTS	OFM	2 years– See remarks	Destroy when obsolete or superseded	GS55-030-17	Reference WAC 246-871-050 (4).
18	PARENTERAL PRODUCTS TESTS FOR MICROBIAL CONTAMINATION	OPR	6 years– See remarks	Destroy when obsolete or superseded	GS55-030-18	Reference WAC 246-871-080 (1).
19	PHARMACEUTICAL WHOLESALER INVENTORIES	OFM	2 years– See remarks	Destroy when obsolete or superseded	GS55-030-19	Reference WAC 246-879-040 (2).
20	PHARMACY INSPECTIONS	OPR	6 years– See remarks	Destroy when obsolete or superseded	GS55-030-20	Reference WAC 246-869-190.
21	PHARMACY LICENSES AND PERMITS	OPR	PERMANENT	Destroy when obsolete or superseded	GS55-030-21	
22	PRESCRIPTIONS Includes original prescriptions, transferred prescriptions, and prescription refills.	OPR	2 years– See remarks	Destroy when obsolete or superseded	GS55-030-22	Reference 21 CFR 1306.25 and WAC 246-869-100.
23	RADIOPHARMACEUTICALS ACQUISITION RECORDS	OPR	Disposition of radiopharmaceutical plus 3 years– See remarks	Destroy when obsolete or superseded	GS55-030-23	Reference WAC 246-903-020 (5).
24	RADIOPHARMACEUTICALS DISPOSITION RECORDS	OPR	Until termination of license– See remarks	Destroy when obsolete or superseded	GS55-030-24	Reference 10 CFR 30.51 (a) (1) & (3), and WAC 246-903-020 (5).
25	RECORD OF RETURNED PHARMACEUTICALS	OFM	Until termination of license– See remarks	Destroy when obsolete or superseded	GS55-030-25	Reference 10 CFR 30.51 (a) (3) and WAC 246-895-060 (10).
26	SCHEDULE I AND SCHEDULE II CHEMICALS RECORDS FOR TABLETING OR ENCAPSULATING MACHINES	OFM	2 years after date of transaction– See remarks	Destroy when obsolete or superseded	GS55-030-26	Reference 21 CFR 1310.04.
27	SCHEDULE I AND SCHEDULE II DRUG COMPLETED FEDERAL ORDER FORMS	OPR	6 years– See remarks	Destroy when obsolete or superseded	GS55-030-27	Reference 21 CFR 1305.13 and WAC 246-887-020 (6).
28	SCHEDULE I, II, III, IV AND V DRUG INVENTORIES	OFM	2 years after superseded – See remarks	Destroy when obsolete or superseded	GS55-030-28	Reference 21 CFR 1304.04 (a) and WAC 246-887-200 (4).
29	SCHEDULE V DRUG DISPENSING RECORDS	OPR	6 years– See remarks	Destroy when obsolete or superseded	GS55-030-29	Reference WAC 246-887-030 (5) (a).
30	SCHEDULE V DRUG REGISTER	OPR	6 years after last entry– See remarks	Destroy when obsolete or superseded	GS55-030-30	Reference WAC 246-887-030 (5) (a).

Schedule Title: PHARMACY

DISPOSITION AUTHORITY GS55-030

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
31	THERAPEUTICALLY EQUIVALENT DRUG SUBSTITUTION AUTHORIZATION	OPR	10 years after last treatment – See remarks	Destroy when obsolete or superseded	GS55-030-31	Reference WAC 246-899-030 (3).

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## PHYSICAL THERAPY AND REHABILITATION

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## PHYSICAL THERAPY AND REHABILITATION - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

Schedule Title: PHYSICAL THERAPY AND REHABILITATION

DISPOSITION AUTHORITY GS55-03P

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	<p>OUTPATIENT TREATMENT FILES</p> <p><b>ESSENTIAL RECORD</b> - Needs security backup - See remarks</p>	OPR	10 years after last discharge or 3 years after patient turns age 18, whichever is longer - See remarks	Destroy when obsolete or superseded	GS55-03P-01	<p>Reference RCW 70.41.190. <b>The Washington State Supreme Court decision re: DeYoung</b> has voided limitations of action and discovery previously provided by RCW 4.16.350. Contact your legal counsel and insurance provider for guidance on minimum retention policy for this records series. The Washington State Medical Association recommends 10 years after last visit, 20 years after last treatment of pregnant women and infants or 5 years after patient's death, whichever is longest.</p> <p>Should be protected from damage or loss by off site storage of backup tapes. In non-automated systems, security copies should be stored off site, or the natural dispersal of copies inside and outside the agency should be documented.</p>

SUPERSEDED

Schedule Title: PHYSICAL THERAPY AND REHABILITATION

DISPOSITION AUTHORITY GS55-03P

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
2	PATIENT TREATMENT FILES  <b>ESSENTIAL RECORD</b> - Needs security backup - See remarks.	OPR	10 years after last discharge or 3 years after patient turns age 18, whichever is longer - See remarks	Destroy when obsolete or superseded	GS55-03P-02	Reference RCW 70.41.190. <b>The Washington State Supreme Court decision re: DeYoung</b> has voided limitations of action and discovery previously provided by RCW 4.16.350. Contact your legal counsel and insurance provider for guidance on minimum retention policy for this records series. The Washington State Medical Association recommends 10 years after last visit, 20 years after last treatment of pregnant women and infants or 5 years after patient's death, whichever is longest.  Should be protected from damage or loss by off site storage of backup tapes. In non-automated systems, security copies should be stored off site, or the natural dispersal of copies inside and outside the agency should be documented.
3	TREATMENT LOG AND TREATMENT CARDS	OFM	3 years	Destroy when obsolete or superseded	GS55-03P-03	

SUPERSEDED

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## PUBLIC INFORMATION/RELATIONS

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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## PUBLIC INFORMATION/RELATIONS - INCLUSIVE

Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

Schedule Title: PUBLIC INFORMATION/RELATIONS

DISPOSITION AUTHORITY GS50-06F

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	BIOGRAPHICAL FILES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-01	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
2	HISTORICAL FILES OF THE AGENCY	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-02	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3	INFORMATIONAL REPORTS COMPILED FOR AGENCY USE	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-03	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
4	MASTER FILE OF AGENCY PUBLICATIONS	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remark</b>	Destroy when obsolete or superseded	GS50-06F-04	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
5	NEWSPAPER CLIPPINGS	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-05	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6	PHOTOGRAPHS, AUDIO/VISUAL MATERIAL Photographic negatives and prints may be held at Regional Archives for permanent preservation and security backup - <b>See remarks.</b>	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-06	Contact your Regional Archivist before disposing of this record or to discuss transfer for permanent preservation and security backup.
7	PRESS RELEASES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-07	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
8	SCRAPBOOKS AND ALBUMS	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-08	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED

Schedule Title: PUBLIC INFORMATION/RELATIONS

DISPOSITION AUTHORITY GS50-06F

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
9	SPEECHES	OFM	Destroy when obsolete or superseded - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-06F-09	Contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

**SUPERSEDED**



# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## PURCHASING

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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## PURCHASING - INCLUSIVE

Approved by the Washington State Local Records Committee – July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

**Schedule Title: PURCHASING - CENTRAL STORES**

**DISPOSITION AUTHORITY GS50-08B**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	EQUIPMENT/VEHICLE PARTS ORDERS	OFM	3 years	Destroy when obsolete or superseded	GS50-06E-21	
2	INVENTORY OF MATERIALS/EQUIPMENT, CHANGES AND TRANSFERS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-02	
3	INVENTORY/YEAR-END REPORT	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-03	
4	MATERIALS DISBURSEMENT TICKETS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-04	
5	MATERIALS ORDERS/REQUISITIONS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-05	
6	MATERIALS RECEIPTS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-06	
7	MATERIALS RECEIVING AND DISBURSEMENT REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-08B-07	
8	PACKING SLIPS	OFM	Until confirmation of materials received	Destroy when obsolete or superseded	GS50-08B-08	

**Schedule Title: PURCHASING - PROCUREMENT**

**DISPOSITION AUTHORITY GS50-08A**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	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, the chosen bid or proposal, and statements of qualification.	OPR	6 years after completion of purchase or fulfillment of contract	Destroy when obsolete or superseded	GS50-08A-01	
2	CONSULTANT AND CONTRACTOR ROSTERS	OFM	Destroy when superseded plus 6 years	Destroy when obsolete or superseded	GS50-08A-02	
3	DAMAGE AND LOSS CLAIMS – PURCHASING	OFM	Keep until completion of State Auditor's examination, plus 6 years if there is a monetary settlement	Destroy when obsolete or superseded	GS50-08A-03	
4	DEBIT/CREDIT CHARGES – PURCHASING	OFM	3 years	Destroy when obsolete or superseded	GS50-08A-04	
5	DELIVERY RECEIPT-INTERNAL – PURCHASING	OFM	3 years	Destroy when obsolete or superseded	GS50-08A-05	
6	PRICE CHECKS AND INFORMAL QUOTATIONS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-08A-06	

**Schedule Title: PURCHASING - PROCUREMENT**

**DISPOSITION AUTHORITY GS50-08A**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
7	PURCHASE ORDER, REQUISITION AND BID LOGS LISTING Listing of purchase order, requisitions, and/or bids in numerical order, including date, item, amount, department, and vendor.	OFM	3 years	Destroy when obsolete or superseded	GS50-08A-07	
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	GS50-08A-08	
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	GS50-08A-09	
10	REQUISITIONS Official statement documenting the purchase of commodities, goods, or services subject to bid.	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-10	
11	UNSUCCESSFUL BIDS AND PROPOSALS Includes statement of qualification.	OFM	2 years	Destroy when obsolete or superseded	GS50-08A-11	
12	WITHDRAWAL/CANCELLATION/CHANGE OF PURCHASE ORDERS	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-12	
13	WOMEN AND MINORITY OWNED BUSINESS ENTERPRISE (WMBE) VENDOR COMPLIANCE REPORTS	OPR	6 years	Destroy when obsolete or superseded	GS50-08A-13	Note: Initiative Measure 200 went into affect 12/98. Disposition of this series may begin in 2005.

**Schedule Title: PURCHASING - SURPLUS PROPERTY**

**DISPOSITION AUTHORITY GS50-08C**

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

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## QUALITY ASSURANCE DEPARTMENT

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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## QUALITY ASSURANCE DEPARTMENT - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: QUALITY ASSURANCE DEPARTMENT**

**DISPOSITION AUTHORITY GS55-03Q**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ACCIDENT/INJURY REPORTS	OPR	Adults: 6 years Minors: 6 years after age of majority	Destroy when obsolete or superseded	GS55-03Q-01	
2	QUALITY IMPROVEMENT COMMITTEE/PEER REVIEW COMMITTEE MINUTES	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-03A-13	Contact your Regional Archivist before disposing of this record.
3	UTILIZATION REVIEW AND QUALITY ASSURANCE PROGRAM PLAN	OPR	PERMANENT - Potential archival value - See remarks	Destroy when obsolete or superseded	GS55-03Q-03	Contact your Regional Archivist before disposing of this record.
4	UTILIZATION REVIEW WORKSHEETS AND ABSTRACTS	OFM	1 year	Destroy when obsolete or superseded	GS55-03Q-04	
5	WSPRO/PRO STUDIES Washington State Professional Review Organization.	OFM	3 years	Destroy when obsolete or superseded	GS55-03Q-05	

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## RECORDS MANAGEMENT

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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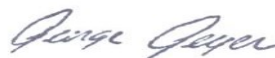
**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## RECORDS MANAGEMENT- INCLUSIVE

Approved by the Washington State Local Records Committee – Revised July 2001



For the Attorney General: Brian Buchholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

**Schedule Title: RECORDS MANAGEMENT**

**DISPOSITION AUTHORITY GS50-09**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	FILES CLASSIFICATION GUIDELINES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-09-12	
2	GENERAL RECORDS RETENTION SCHEDULE Records retention schedules issued by the Local Records Committee that provide all agencies with continuing authorization for disposition of commonly held records.	OFM	Local Records Committee - PERMANENT	Destroy when obsolete or superseded	GS50-09-01	
3	PUBLIC DISCLOSURE REQUEST FILES Formal request submitted by individuals for access to agency records.	OPR	Current year plus 1 year <b>-See remarks</b>	Destroy when obsolete or superseded	GS50-09-04	Records Committee reduced the retention from 6 years per RCW 40.14.060 (b) on 8/30/01.
4	PUBLIC DISCLOSURE REQUEST LOGS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-09-13	
5	PUBLIC RECORDS DESTRUCTION AFFIDAVITS Listings of records series destroyed at specific times, including inclusive dates or inclusive numbers, signed by agency representative witnessing destruction.	OPR	6 years	Destroy when obsolete or superseded	GS50-09-05	
6	PUBLIC RECORDS DESTRUCTION LOG <b>ESSENTIAL RECORD</b> – Needs security backup – <b>See remarks.</b>	OPR	PERMANENT	Destroy when obsolete or superseded	GS50-09-06	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
7	PUBLIC RECORDS RETENTION SCHEDULE AND DESTRUCTION AUTHORIZATION Continuing authorities for the disposition of public records approved specifically for the agency by the Local Records Committee.	OPR	Local Records Committee - PERMANENT	Destroy when obsolete or superseded	GS50-09-07	The Local Records Committee recommends a retention period of 6 years after disposition of the last records series listed on the schedule.
8	RECORDS CENTER TRANSMITTALS, INVENTORIES, AND INDEXES <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks.</b>	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-09-08	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
9	RECORDS DESTRUCTION AUTHORIZATION (OFFICE OF RECORD) Document signed by the office of record allowing the destruction of specific records	OPR	6 years	Destroy when obsolete or superseded	GS50-09-10	
10	RECORDS RETENTION SCHEDULES - INTERNAL Internal working guides abstracted from approved records retention schedules or approved general records retention schedules.	OFM	Destroy when superseded or revised	Destroy when obsolete or superseded	GS50-09-02	

SUPERSEDED

**Schedule Title: RECORDS MANAGEMENT**

**DISPOSITION AUTHORITY GS50-09**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
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11	RECORDS RETRIEVAL REQUEST AND CIRCULATION DOCUMENTATION Documentation of materials pulled from and/or returned to records storage center.	OFM	Keep until materials returned to records center	Destroy when obsolete or superseded	GS50-09-11	

**SUPERSEDED**



# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## RESPIRATORY CARE

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

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## RESPIRATORY CARE - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: RESPIRATORY CARE**

**DISPOSITION AUTHORITY GS55-03S**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	DIAGNOSTIC GRAPHS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03S-01	Copies of diagnostic graphs should also be filed and retained in Patient Case Files.
2	PATIENT TREATMENT LOG	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS50-03S-02	Primary copy should be held in Patient Case File in Medical Records.
3	PULMONARY FUNCTION AND OTHER RESPIRATORY TESTS	OFM	3 years - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03S-03	Primary copy should be held in Patient Case File in Medical Records.

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## SOCIAL SERVICES

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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

**Official Public Records (OPR)** are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

**Potential Archival Value** – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

**Essential Record** – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

## SOCIAL SERVICES - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: SOCIAL SERVICES**

**DISPOSITION AUTHORITY GS55-03W**

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	CLIENT (PATIENT) CASE FILES (TREATMENT COMPLETED AND CASE CLOSED) <b>ESSENTIAL RECORD</b> - Needs security backup - <b>See remarks</b>	OPR	10 years after last discharge or 3 years after client turns age 18, whichever is longer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03W-01	Reference RCW 70.14.190. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.
2	CLIENT (PATIENT) SERVICE LOG	OFM	Until disposition of last Client (Patient) File listed	Destroy when obsolete or superseded	GS50-03W-02	
3	INVOLUNTARY COMMITMENT CASE FILES (PROCEEDINGS COMPLETED AND CASE CLOSED)	OFM	10 years after last discharge or 3 years after client turns age 18, whichever is longer - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03W-03	Reference RCW 70.14.190. Permanent record held by Superior Court.
4	STATISTICAL REPORTS TO DEPARTMENT OF SOCIAL AND HEALTH SERVICES OR OTHER SUCH AGENCIES	OFM	2 years - Potential archival value - <b>See remarks</b>	Destroy when obsolete or superseded	GS55-03W-04	Contact your Regional Archivist before disposing of this record.

**SUPERSEDED**

# PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

## SPEECH AND HEARING

The following general records retention schedule sets minimum retention requirements and provides blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to public hospital districts. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

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## SPEECH AND HEARING - INCLUSIVE

Approved by the Washington State Local Records Committee – July 1999



For the Attorney General: Brian Buchholz



For the State Auditor: Cliff Whipple



For the State Archivist: David Owens

**Schedule Title: SPEECH AND HEARING**

**DISPOSITION AUTHORITY GS55-03T**

SERIE S NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	PATIENT TREATMENT LOG	OFM	3 years	Destroy when obsolete or superseded	GS55-03T-01	

**SUPERSEDED**

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