



**This schedule applies to: School Districts and Educational Service Districts**

**Scope of records retention schedule**

This records retention schedule covers the public records of School Districts and Educational Service Districts relating to the function of education. It is to be used in conjunction with the *Local Government Common Records Retention Schedule (CORE)*, which can be found at: <http://www.sos.wa.gov/archives/RecordsRetentionSchedules.aspx>.

**Disposition of public records**

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


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


**Revocation of previously issued records retention schedules**

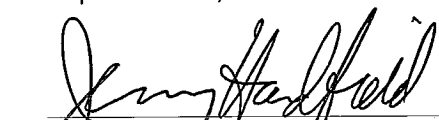
All previously approved disposition authorities for records that are covered by this retention schedule are revoked, including those listed in all general and agency unique retention schedules. Local government agencies must ensure that the retention and disposition of public records is in accordance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

**Authority**

This records retention schedule was approved by the Local Records Committee in accordance with RCW 40.14.070 on September 29, 2011.

  
For the State Auditor: Mark Rapozo

  
For the Attorney General: Cindy Evans

  
The State Archivist: Jerry Handfield



## Revision History

Version	Date of Approval	Extent of Revision
1.0	1976	Initial version.
2.0	1980	
2.1	1982-1983	
3.0	January 1, 1986	Major revision. Major revision and multiple updates.
4.0	March 31, 1994	
5.0	March, 1999	
5.1	July, 2001	
5.2	December, 2001	
6.0	March 27, 2003	
6.1	May, 2007	Online version; updated electronic records information.
7.0	July 29, 2008	Major revision. Records series common to all local government agencies now appear in the new <i>Local Government Common Records Retention Schedule (CORE)</i> and have been removed from this schedule. All Disposition Authority Numbers (DANs) in the now begin with the prefix "SD".
7.1	July 30, 2009	Changes to structure/format only; no changes to records series. Indexes added.
7.2	September 29, 2011	Attendance/Absence section completely revised. Records series covering field trips and parental permissions updated. Two new records series added, 14 revised, and 18 discontinued. (Please see Revision Guide for details.) Revision numbers added and previous revision notes removed. Secondary record column deleted. (Secondary records are covered by CORE DAN GS50-02-04.)

**SUPERSEDED**



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**SUPERSEDED**



## 1. AGENCY MANAGEMENT

This section covers records relating to agency management which are not covered by the *Local Government Common Records Retention Schedule (CORE)*.

### 1.1. BOARDS, COUNCILS AND COMMITTEES

*The activity of documenting the business of decision-making bodies, and the administrative arrangements and support provided to them.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.1.1	ASSOCIATED STUDENT BODY (ASB) – BYLAWS	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-01-08 Rev. 0	Contact your Regional Archivist. Records from the series may be selected to be transferred and preserved at a Regional Archives Branch.
1.1.2	ASSOCIATED STUDENT BODY (ASB) – MINUTES	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-20-01 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.



## 1.2. COMMUNITY RELATIONS

*The activity of the local government agency's interaction with its community.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	RETENTION AND DISPOSITION ACTION	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.2.1	DESCRIPTIVE GUIDE TO SCHOOL DISTRICT ADMINISTRATION AND BUILDINGS	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-05-05 Rev. 0	Contact your Regional Archivist. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

# SUPERSEDED



## 1.2. COMMUNITY RELATIONS

*The activity of the local government agency's interaction with its community.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	RETENTION AND DISPOSITION ACTION	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.2.2	<p>HISTORICAL RECORDS, MATERIALS AND ARTIFACTS THAT SHOULD BE RETAINED FOR COMMEMORATIVE EVENTS AND DISPLAYS</p> <p>Records documenting significant events or milestones of individual schools, school districts, and educational service districts, where these events are not documented in other records (such as board minutes, students transcripts, etc.)</p> <p>May include, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Award Lists</li> <li>• Class Activities Materials</li> <li>• Baccalaureate and Commencement Programs</li> <li>• Cumulative Class Rankings</li> <li>• Diploma Order Lists</li> <li>• Exhibits</li> <li>• Final Grade Point Summaries; Honor Roll Lists</li> <li>• Graduating Class History Files</li> <li>• Yearbooks/Annuals</li> </ul> <p><i>Use DAN SD51-20-10 for GRADUATE LIST.</i></p> <p><i>Note: Other historical materials and artifacts (non-records) should also be retained by the school for commemorative events and displays (school reunions, centennials, etc.) or made available to local heritage organizations. Items may include banners, posters, trophies, uniforms, etc.</i></p>	OPR	PERMANENT – potential archival value – See remarks.	SD51-01-52 Rev. 0	Contact your Regional Archivist. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

SUPERSEDED



## 1.2. COMMUNITY RELATIONS

*The activity of the local government agency's interaction with its community.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	RETENTION AND DISPOSITION ACTION	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.2.3	PHOTO/MEDIA RELEASE FORM – EXTERNAL Records documenting permission, or denial of permission, to use student images by non-school district parties such as television/radio stations, newspapers, school photographers, etc. Student images include, but are not limited to, photos, video, and audio recordings.	OFM	3 years after end of school year.	SD51-20-08 Rev. 0	
1.2.4	PHOTO/MEDIA RELEASE FORM – INTERNAL Records documenting permission, or denial of permission, to use student images recorded during official school activities/events, by staff or students in an official capacity (e.g. school newspaper, annual staff, etc.) Student images include, but are not limited to, photos, video, and audio recordings.	OFM	Retain for current school year.	SD51-20-09 Rev. 0	
1.2.5	PUBLIC RESEARCH ACCESS REQUEST Request for access to district records for research purposes. <i>See DAN GS50-09-04 for public disclosure requests.</i>	OFM	Resolution of request plus 3 years.	SD51-01-35 Rev. 0	
1.2.6	PUBLIC RESEARCH ACCESS REQUEST LOG	OFM	Last entry in log plus 3 years.	SD51-01-39 Rev. 0	





## 1.2. COMMUNITY RELATIONS

*The activity of the local government agency's interaction with its community.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	RETENTION AND DISPOSITION ACTION	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.2.7	SCHOOL BULLETINS AND NEWSPAPERS	OFM	Retain until appraised by Regional Archivist. Potential archival value. <b>See remarks.</b>	SD51-06F-03 Rev. 0	These records must be appraised by your Regional Archivist. Contact your Regional Archives to arrange for appraisal and transfer.
1.2.8	STUDENT HANDBOOK/CALENDAR	OFM	Retain until appraised by Regional Archivist. Potential archival value. <b>See remarks.</b>	SD51-06F-04 Rev. 0	These records must be appraised by your Regional Archivist. Contact your Regional Archives to arrange for appraisal and transfer.

**SUPERSEDED**



### 1.3. CONTRACTS / AGREEMENTS

*The activity of managing contracts and agreements entered into by the local government agency and processes involved in the development of such contracts and agreements.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.3.1	VENDOR FILES Includes vendor lists, changes, additions, and deletions.	OFM	3 years or until completion of State Auditor's examination report.	SD51-02-30 Rev. 0	

# SUPERSEDED



#### 1.4. PLANNING, MISSION, AND CHARTER

*The activity of documenting and determining the local government agency's objectives, and the means for obtaining them.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.4.1	DEMOGRAPHIC AND ENROLLMENT PROJECTIONS	OFM	3 years.	SD51-07-08 Rev. 0	
1.4.2	<b>School Safety Plans</b> Records relating to the agency's plans for ensuring student and staff safety at school. Includes, but is not limited to: <ul style="list-style-type: none"><li>• Safe school plans prepared in accordance with RCW 28A.320.125;</li><li>• Harassment, intimidation and bullying prevention plans prepared and maintained in accordance with RCW 28A.300.285.</li></ul>	OPR	<b>Retain</b> for 6 years after obsolete or superseded <i>then</i> <b>Destroy.</b>	SD2011-153 Rev. 0	

SUPERSEDED



### 1.5. REPORTING

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.5.1	<p><b>Reporting – Office of the Superintendent of Public Instruction (OSPI) – General</b> Records relating to reports required to be submitted to the Office of the Superintendent of Public Instruction (OSPI) in accordance with Title RCW 28A RCW and Title 392 WAC, <b>where not covered by a more specific records series.</b> Includes records documenting revisions/corrections. Includes but is not limited to:</p> <ul style="list-style-type: none"> <li>• Absence report (for apportionment/count, P-223);</li> <li>• Alternative Learning Experience (ALE) enrollment (WAC 392-121-182);</li> <li>• Ethnicity and race data (RCW 28A.30.505);</li> <li>• Graduation and dropout data;</li> <li>• School safety plan <u>summary</u> (RCW 28A.300.285);</li> <li>• Truancy report;</li> <li>• Weapons and student behavior data.</li> </ul> <p>Excludes school safety <u>plans</u> covered by SD2011-153.</p>	OPR	Retain for 4 years after submission of report or completion of State Auditor’s examination report, whichever is sooner <i>then</i> <b>Destroy.</b>	SD51-01-37 Rev. 1	

SUPERSEDED



## 1.6. RISK MANAGEMENT / INSURANCE

*The activity of identifying and mitigating risks to the local government agency.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
1.6.1	EMERGENCY INFORMATION FORM FOR STUDENTS AND STAFF	OFM	Retain for current school year.	SD51-01-51 Rev. 0	
1.6.2	INSURANCE CERTIFICATES Insurance where the school district is a third party. Provides protection to district in case of incident/accident during event/activity.	OFM	Expiration of certificate plus 3 years.	SD51-05C-32 Rev. 0	

**SUPERSEDED**



## 2. ASSET MANAGEMENT

This section covers records relating to asset management which are not covered by the *Local Government Common Records Retention Schedule (CORE)*.

### 2.1. REPORTING

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
2.1.1	<b>Reporting – Operating Savings (Major Facility Projects)</b> Reports submitted to the Washington State Department of General Administration documenting operating savings resulting from implementation of Leadership in Energy and Environmental Design (LEED) silver standards in major facility projects in accordance with <u>RCW 39.35D.030</u> .	OPR	<b>Retain</b> for 4 years after submission of report or completion of State Auditor’s examination report, whichever is sooner <i>then</i> <b>Destroy</b> .	SD51-12-03 Rev. 1	



## 2.2. MAINTENANCE

*The activity of repairing or servicing the assets of the local government agency. Includes buildings, vehicles, and equipment.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
2.2.1	BUS CONDITION CHECKLIST Daily evaluation of bus by drivers.	OFM	1 year.	SD51-05G-04 Rev. 0	

**SUPERSEDED**



**2.3. OPERATIONS**

*The activity of managing the day-to-day usage of the local government agency's buildings, vehicles and equipment.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
2.3.1	BUS OPERATIONS DAILY LOG May show bus route, time trip began and ended, number of pupils carried, and driver's signature.	OPR	6 years.	SD51-05G-06 Rev. 0	
2.3.2	BUS SCHEDULE FOR ALL SCHOOLS Shows route, stops and time for each bus. Includes state approved route map.	OFM	3 years.	SD51-05G-07 Rev. 0	
2.3.3	FUEL/OIL RECORDS FOR INDIVIDUAL BUSES AND OTHER VEHICLES May list vehicle number, amount of fuel pumped, odometer reading, etc.	OFM	3 years.	SD51-05G-12 Rev. 0	

SUPERSEDED





### 3. EDUCATIONAL SERVICE DISTRICTS

#### 3.1. ADMINISTRATION

*Reference RCW 28A.310.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
3.1.1	BOARD AND REGIONAL COMMITTEE ELECTION CERTIFICATES	OPR	PERMANENT.	SD51-11-01 Rev. 0	
3.1.2	BOUNDARY RECORDS	OPR	PERMANENT – 1 copy potential archival value.	SD51-11-02 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
3.1.3	COUNTY SUPERINTENDENT OF SCHOOLS RECORDS	OPR	These records are archival and should be transferred to the nearest Regional Archives Branch.	SD51-11-03 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.



### 3.2. INSTRUCTOR / TEACHER CURRICULUM AND INSTRUCTION

*Reference RCW 28A.310.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
3.2.1	CLASS/WORKSHOP RECORDS If offered for fee or credit.	OPR	6 years after close of fiscal year.	SD51-13-01 Rev. 0	
3.2.2	CLOCK HOUR RECORDS	OPR	7 years.	SD51-12-01 Rev. 0	WAC 181-85-205
3.2.3	INSERVICE ATTENDANCE REPORTS	OPR	6 years after close of fiscal year.	SD51-12-02 Rev. 0	
3.2.4	PROGRAM APPLICATIONS	OPR	6 years after close of fiscal year.	SD51-12-04 Rev. 0	
3.2.5	REGIONAL DRUG AND ALCOHOL SURVEYS	OFM	6 years after close of fiscal year – potential archival value – See remarks.	SD51-12-05 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

**SUPERSEDED**



### 3.3. LEARNING RESOURCE CENTER

*Reference RCW 28A.310.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
3.3.1	LEARNING RESOURCE CENTER (LRC) SELECTION ADVISORY COMMITTEE PURCHASE RECOMMENDATIONS (VOTING TABULATION)	OPR	3 years after close of fiscal year.	SD51-13-03 Rev. 0	
3.3.2	TEACHER EVALUATION FORMS OF LEARNING RESOURCE CENTER (LRC) COLLECTIONS Includes files, etc.	OPR	3 years after close of fiscal year.	SD51-13-04 Rev. 0	

**SUPERSEDED**



### 3.4. TEACHER CERTIFICATION

*Reference RCW 28A.310.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
3.4.1	CERTIFICATE APPLICATION FEES RECEIPT BOOK	OPR	6 years after close of fiscal year.	SD51-14-01 Rev. 0	
3.4.2	CERTIFICATE INFORMATION SUMMARY Computed data.	OPR	6 years after close of fiscal year.	SD51-14-02 Rev. 0	
3.4.3	CERTIFICATION FEE REPORT – QUARTERLY/ANNUAL	OPR	6 years after close of fiscal year.	SD51-14-03 Rev. 0	
3.4.4	PROFESSIONAL EDUCATION PERMITS – TEMPORARY	OPR	6 years after close of fiscal year.	SD51-14-04 Rev. 0	

**SUPERSEDED**



## 4. FINANCIAL MANAGEMENT

This section covers records relating to financial management which are not covered by the *Local Government Common Records Retention Schedule (CORE)*.

### 4.1. ACCOUNTING

*The activity relating to the creation of financial records of agency business transactions and the preparation of statements concerning the assets, liabilities, and performance of the local government agency.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
4.1.1	STUDENT FEE AND FINE STATEMENTS	OFM	3 years.	SD51-02-27 Rev. 0	

**SUPERSEDED**



## 4.2. BUDGET

*The activity of determining estimates of the local government agency's future revenue and expenditures.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
4.2.1	<b>Apportionment Report from OSPI</b> Apportionment report received from the Office of the Superintendent of Public Instruction (OSPI) informing the district of its funding allocation.  <i>Note: OSPI's copies of these reports are designated Archival in accordance with its records retention schedule.</i>	OPR	Retain for 4 years after date of report or completion of State Auditor's examination report, whichever is sooner <b>then Destroy.</b>	SD51-02-03 Rev. 1	
4.2.2	BUDGET REVISION REQUESTS Formal requests to revise a budget that has already been adopted.	OPR	6 years.	SD51-02A-04 Rev. 0	



#### 4.3. GRANTS

*The activity of the local government agency either giving or receiving grant funds.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
4.3.1	NON-FEDERAL AND/OR NON-STATE GRANTS ISSUED – SUCCESSFUL APPLICATION ADMINISTRATION FILES Documentation of grants and grant programs awarded by non-governmental entities. Includes grant announcement parameters, grant applications, grant evaluation summaries, notification of grant awards, fiscal reports, correspondence related to grant monitoring, audit reports, and related documentation. Also includes grant project status, and progress and compliance reports prepared and submitted by grantee.	OPR	3 years after completion of grant.	SD51-03C-14 Rev. 0	
4.3.2	STATE GRANTS ISSUED – SUCCESSFUL APPLICATION ADMINISTRATION Documentation of grants and grant programs awarded by the State. Includes grant announcement parameters, grant applications, grant evaluation summaries, notification of grant awards, fiscal reports, correspondence related to grant monitoring, audit reports, and related documentation. Also includes grant project status, and progress and compliance reports prepared and submitted by grantee.	OPR	6 years after completion of grant audit or retain for period required by grant program.	SD51-03C-15 Rev. 0	
4.3.3	SURVEY OF PARENTS OR LEGAL GUARDIANS LIVING OR WORKING ON FEDERAL PROPERTY (Public Law 81-874) – ELIGIBLE	OPR	5 years after receipt of final payment – See remarks.	SD51-03C-16 Rev. 0	Reference 34 CFR 222.



#### 4.3. GRANTS

*The activity of the local government agency either giving or receiving grant funds.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
4.3.4	SURVEY OF PARENTS OR LEGAL GUARDIANS LIVING OR WORKING ON FEDERAL PROPERTY (Public Law 81-874) – <u>NOT</u> ELIGIBLE	OFM	Retain until submittal of the application.	SD51-03C-17 Rev. 0	

# SUPERSEDED





#### 4.4. PAYROLL

*The activity relating to the monetary compensation of employees on a periodic basis.*

The district must be aware that it is responsible for providing information for the Washington State Department of Retirement Systems' audits of employee pay history. This information includes hours worked and gross pay per calendar month for the entire term of each employee's employment with the district. Such information must be retained for at least 60 years. Choice of records series for long-term verification of retirement eligibility should be confirmed with the Washington State Department of Retirement Systems. Chosen records series may be retained on microfilm instead of hard copy.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
4.4.1	PAYROLL STATUS SHEETS FOR DISTRICTS NOT USING PERSONNEL ACTION REQUEST FORMS	OFM	3 years or until completion of State Auditor's examination report.	SD51-03E-28 Rev. 0	
4.4.2	PAYROLL STATUS SHEETS FOR DISTRICTS USING PERSONNEL ACTION REQUEST FORMS	OFM	Until data entered and verified.	SD51-03E-26 Rev. 0	



## 5. HUMAN RESOURCE MANAGEMENT

This section covers records relating to human resource management which are not covered by the *Local Government Common Records Retention Schedule (CORE)*.

### 5.1. EQUITY

*The activity of ensuring fairness and equal opportunities for all employees.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
5.1.1	EQUAL EMPLOYMENT OPPORTUNITY INQUIRY (EEO)	OFM	3 years.	SD51-04C-02 Rev. 0	

**SUPERSEDED**



**5.2. PERSONNEL**

*The activity of documenting an individual's employment with the local government agency. Includes volunteers.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
5.2.1	SIGNATURE OF RECEIPT RECORD Receipts or lists signed by employees to verify receipt of instructions, or documents such as paychecks, leave/benefit reports, retirement system accounting statements, etc.	OFM	1 year.	SD51-01-46 Rev. 0	

**SUPERSEDED**



### 5.3. STAFF DEVELOPMENT

*The activity of enhancing employees' competencies and skills through programs and training.*

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
5.3.1	APPROVED IN-SERVICE EDUCATION Clock hour credit activities.	OPR	7 years.	SD51-04G-01 Rev. 0	Reference WAC 180-85-205. / TRAINING
5.3.2	FIRST AID/CPR TRAINING DOCUMENTATION	OPR	Destroy when superseded plus six years.	SD51-01-22 Rev. 0	
5.3.3	LIST OF HIV AND HBV TRAINED EMPLOYEES	OPR	30 years.	SD51-04G-03 Rev. 0	
5.3.4	STAFF TRAINING, ASSISTANCE, AND REVIEW PROGRAM CASE FILES Includes, but is not limited to, reports generated by teacher, mentor, or principal, narrative and checklist assessments, intervention forms for experienced teachers, program exit letter, contact log, and mutually agreed upon goals.	OFM	Exit from program plus 5 years.	SD51-04G-05 Rev. 0	<b>NOTE:</b> The final report may be removed from the personnel file after 5 years upon request from the participant. It should also be noted that termination of employment is not a consequence of an unsuccessful exit from program.

SUPERSEDED



## 6. STUDENT LEARNING

6.1. CURRICULUM / INSTRUCTION					
ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.1.1	ACCREDITATION REPORTS AND EVALUATION REPORTS Separate evaluations of all district reports subject to review.	OPR	Destroy when superseded plus 6 years – potential archival value – See remarks.	SD51-06A-01 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6.1.2	CATEGORICAL PROGRAM FILES 1. State categorical programs: Student lists, test scores, inventory of equipment, legal reports, evaluations and assurances to be maintained for monitoring and auditing purposes. 2. Federal categorical programs: Student eligibility lists, comparability reports, pre- and post-test data, evaluations, inventory of equipment, parent advisory committee (Title I).	OFM	3 years after completion of grant audit or retain for period required by grant or program – See remarks.	SD51-06A-02 Rev. 0	Records from this series which become involved in an audit or litigation before the end of the retention period specified by the granting agency must be retained at least until the audit or litigation is resolved.
6.1.3	COMMUNITY CHALLENGES OF INSTRUCTIONAL MATERIALS	OFM	5 years.	SD51-06A-03 Rev. 0	
6.1.4	COURSE ADDITIONS, DELETIONS, AND CHANGES	OFM	3 years.	SD51-06A-04 Rev. 0	
6.1.5	COURSE DESCRIPTION CATALOG	OPR	PERMANENT.	SD51-06A-19 Rev. 0	



6.1. CURRICULUM / INSTRUCTION					
ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.1.6	CURRICULUM SUMMARIES AND GUIDES	OFM	PERMANENT – 1 copy potential archival value – See remarks.	SD51-06A-05 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
6.1.7	CURRICULUM WAIVER REQUESTS Documents received from legal guardian excusing student from specific classes (i.e., Physical Education because of injury, etc.)	OPR	5 years.	SD51-06A-11 Rev. 0	
6.1.8	ESSENTIAL ACADEMIC LEARNING REQUIREMENTS (EALR) PROGRAM FILES 1. A complete set of student learning objectives for each core subject. 2. Community input data for development of EALR student learning objectives. 3. Evaluation data for each EALR.	OFM	Destroy when superseded.	SD51-06A-06 Rev. 0	
6.1.9	ESSENTIAL ACADEMIC LEARNING REQUIREMENTS (EALR) PROGRAM FILES RESULTS	OFM	Destroy after compilation and issuance of test data.	SD51-06A-07 Rev. 0	
6.1.10	GRADUATION REQUIREMENTS STATEMENTS Statement of required courses and credits that is approved by the Board.	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-06A-08 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.

SUPERSEDED



<b>6.1. CURRICULUM / INSTRUCTION</b>					
ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.1.11	INDIVIDUAL ESSENTIAL ACADEMIC LEARNING REPORTS	OFM	Destroy after compilation and issuance of test data.	SD51-06A-09 Rev. 0	
6.1.12	INSTRUCTIONAL MATERIALS SUBJECT FILE Evaluation data and recommendations on instructional materials that are accrued prior to Board adoption, where not included in Advisory Board Agenda Packets (DAN GS50-05B-02).	OFM	3 years.	SD51-06A-10 Rev. 0	
6.1.13	PARENT/LEGAL GUARDIAN PERMISSION SLIPS FOR INTERNET ACCESS AND FILM VIEWING	OFM	Retain for current school year.	SD51-06A-12 Rev. 0	
6.1.14	SCHOOL MASTER SCHEDULE Class schedule unique to each school.	OFM	6 years, and then retain until appraised by Regional Archivist. Potential archival value. See remarks.	SD51-20-03 Rev. 0	These records must be appraised by your Regional Archivist. Contact your Regional Archives to arrange for appraisal and transfer.
6.1.15	STATEMENT OF REQUIREMENTS AND EXPECTATIONS SIGNED AND RETURNED BY PARENT/LEGAL GUARDIAN	OFM	Retain for current school year.	SD51-01-49 Rev. 0	
6.1.16	STUDENT ASSESSMENT AND PLACEMENT PROGRAM CASE FILES	OFM	1 year after screening.	SD51-06A-13 Rev. 0	

SUPERSEDED



## 6.1. CURRICULUM / INSTRUCTION

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.1.17	STUDENT TESTING – GROUP REPORTS Summary of testing scores by class, grade, program, sex, ethnic group, building, district, etc.	OFM	5 years.	SD51-06A-16 Rev. 0	
6.1.18	STUDENT TESTING – INDIVIDUAL STUDENT REPORT	OFM	Destroy 2 years after graduation or withdrawal.	SD51-06A-17 Rev. 0	
6.1.19	STUDENT TESTING – PRIMARY RECORD Answer sheet or other medium completed by student.	OFM	90 days.	SD51-06A-18 Rev. 0	

**SUPERSEDED**





## 6.2. HOME-BASED INSTRUCTION

Reference RCW 28A.200

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.2.1	LIST OF SERVICES PROVIDED BY THE SCHOOL DISTRICT	OPR	6 years.	SD51-09A-01 Rev. 0	
6.2.2	LIST OF STUDENTS PARTICIPATING IN HOME-BASED INSTRUCTION	OPR	6 years.	SD51-09A-02 Rev. 0	
6.2.3	NOTICE OF TRANSFER OF HOME-BASED STUDENT TO DISTRICT Documents the transfer of home-based students back to district schools.	OFM	<b>Retain</b> for 2 years after student graduates or withdraws then <b>Destroy</b> .	SD51-09A-03 Rev. 1	
6.2.4	PARENT/LEGAL GUARDIAN DECLARATION OF INTENT Annual statement of intent by parent/ legal guardian to provide full-time or part-time home-schooling for an individual student.	OPR	3 years or until completion of State Auditor's examination report.	SD51-09A-05 Rev. 0	
6.2.5	PLACEMENT/EVALUATION TEST RESULTS FOR STUDENTS ENTERING DISTRICT FROM HOME-BASED INSTRUCTION	OFM	2 years after graduation or withdrawal.	SD51-09A-06 Rev. 0	

SUPERSEDED



### 6.3. SKILLS CENTER

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.3.1	<p>PATIENT CASE FILES Records of health care/treatment given to patients provided as part of an instruction program through a skills center.</p> <p>ESSENTIAL RECORD – Needs security backup – See remarks.</p>	OPR	10 years after last visit of patient; written confirmation received from a patient’s health care professional that “forwarded” records have been received; or patient reaches 21 years of age, whichever is longer – See remarks.	SD51-10-02 Rev. 0	Reference RCW 70.02. 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 locations of other copies inside or outside the district.
6.3.2	<p>SKILLS CENTER STUDENT TIME LOG/ SHEET Log/sheet recording a student’s presence/absence in a skills center course.</p>	OFM	3 years or until completion of State Auditor’s examination report.	SD51-10-03 Rev. 0	Reference WAC 392-117-050.

SUPERSEDED



<b>6.4. SPECIAL EDUCATION STUDENT RECORDS</b>					
ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.4.1	REPORT FOR STUDENT NOT ASSIGNED TO THE SPECIAL EDUCATION PROGRAM Referrals, evaluations, evaluation reports, and notices for students determined not to be eligible for the special education program.	OFM	Determined ineligible plus 5 years.	SD51-05I-04 Rev. 0	Reference WAC 392-172A. Federal audit requirements. Confidential information must be protected.
6.4.2	SPECIAL EDUCATION STUDENT HISTORY FILE Includes psychological and IQ test results, eligibility decision documentation, evaluation and other reports, Individualized Education Programs (IEPs), correspondence, and other information regarding the student.	OPR	Separation from program plus 6 years.	SD51-05I-02 Rev. 0	
6.4.3	SPECIAL EDUCATION STUDENT HISTORY FILE DISPOSITION NOTICE RECORD Record/Log of notices sent to the last known address of parents, legal guardians, and/or adult students, advising them of the opportunity to take possession of the file or any of its contents pending disposition by the district. – See Special and/or Disposition Instructions.	OPR	6 years – See remarks.	SD51-05I-03 Rev. 0	Reference WAC 392-172A-05235, 34 CFR 300.624, and FERPA.  NOTE: Notice MUST be sent to last known address of parent/legal guardian/adult student before destruction.

SUPERSEDED



## 6.5. STUDENT RECORDS

Reference WAC 392-185 and WAC 392-415.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.5.1	APPLICATION FOR CERTIFICATE OF EDUCATIONAL COMPETENCE	OFM	<b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b>	SD51-05F-01 Rev. 1	The State Board of Community and Technical Colleges administers GED testing. Reference WAC 180-96 and WAC 131-48.
6.5.2	AUTHORIZATION FOR RELEASE OF STUDENT RECORDS	OPR	3 years	SD51-05F-02 Rev. 0	Reference the Family Educational Rights and Privacy Act (FERPA) 99.32.
6.5.3	CONFIDENTIAL REPORTS (A.K.A. GUIDANCE REPORTS or SUPPLEMENTARY REPORTS) Includes subjective reports and anecdotal information from district, outside agencies and individuals.	OFM	2 years after student graduates or withdraws	SD51-05F-03 Rev. 0	These records should be separated from the cumulative folder with access limited as per the Family Educational Rights and Privacy Act (FERPA).
6.5.4	GED PERMANENT TRANSCRIPT (GED TEST SCORES) Record of all applicants who were issued certificates. <i>Note: This record is retained permanently by the Office of the Superintendent of Public Instruction in accordance with its records retention schedule.</i>	OPR	<b>Retain</b> until no longer needed for agency business <i>then</i> <b>Destroy.</b>	SD51-05F-04 Rev. 1	The State Board of Community and Technical Colleges administers GED testing. Reference WAC 180-96 and WAC 131-48.
6.5.5	GRADUATE LIST Annual list of graduates.  <i>Use DAN GS51-05F-10 for OFFICIAL STUDENT RECORDS AND TRANSCRIPTS</i>	OFM	PERMANENT – Potential Archival Value.	SD51-20-10 Rev. 0	Contact your Regional Archivist. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.



## 6.5. STUDENT RECORDS

Reference WAC 392-185 and WAC 392-415.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.5.6	OFFICIAL STUDENT RECORD For all grades and all schools, including, but not limited to, standardized high school transcripts; middle/junior high school transcript or other academic history showing courses and grades earned; elementary enrollment history and grade progression; permanent record cards; teacher registers (prior to 1940's). All other records pertaining to each student belong in the cumulative folder, or are covered by other series.	OPR	100 years.	SD51-05F-10 Rev. 0	Reference WAC 392-415-060 and 392-415-070.  SUGGESTED PRESERVATION PROCEDURE – MICROFILM This records series may be retained on microfilm instead of hard copy. Microfilming must be done according to standards issued by State Archives.
6.5.7	REQUEST FOR APPROVAL TO TEST FOR CERTIFICATE OF EDUCATIONAL COMPETENCE (GED) Request signed by a designated district employee stating that there is a substantial and warranted reason for the student to leave the regular high school education program. May be kept in the Student Cumulative Folder.	OFM	Destroy when obsolete or superseded.	SD51-05F-05 Rev. 0	Reference WAC 131-48 and WAC 180-96.
6.5.8	SCHOOL REGISTERS	OFM	Obsolete record eligible for disposition unless there is no student transcript* – Potential archival value – <b>See remarks.</b>	SD51-05F-11 Rev. 0	*If there is no official student record that supersedes the school registers, these must be retained 100 years.  Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.



## 6.5. STUDENT RECORDS

Reference WAC 392-185 and WAC 392-415.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.5.9	<p>STUDENT CUMULATIVE FOLDER (A.K.A. STUDENT FILE FOLDER)</p> <p>Contains information collected on each student in addition to the Student Official Record, regardless of storage medium or format.</p> <p>May contain but is not limited to:</p> <ul style="list-style-type: none"> <li>Identifying information (name, birth date, sex, year in school, address, telephone number, parent/legal guardian name, ethnic classification, emergency information (parent/legal guardian place of employment, family doctor, babysitter, siblings).</li> <li>Attendance records including date of entry and withdrawal.</li> <li>Grades and other student progress reports.</li> <li>Results of tests of school achievement, aptitude, interests, hearing, and vision.</li> <li>Records of student accomplishments and participation in school activities.</li> <li>Such other information as shall enable staff to counsel with students and plan appropriate activities.</li> </ul>	OFM	2 years after student graduates or withdraws.	SD51-05F-07 Rev. 0	<p>Information subject to deletion as provided by the Family Educational Rights and Privacy Act should be destroyed and not filmed.</p> <p><b>NOTE: Some items listed in this series may be covered elsewhere in this schedule and may be disposed of accordingly if retained separately.</b></p>
6.5.10	STUDENT DISCIPLINARY ACTION REPORT	OFM	Retain 3 years in school.	SD51-01-50 Rev. 0	



## 6.5. STUDENT RECORDS

Reference WAC 392-185 and WAC 392-415.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.5.11	STUDENT DISCIPLINE FILES Includes student expulsion records. Includes student expulsion records.	OPR	3 years after the incident.	SD51-05F-08 Rev. 0	
6.5.12	STUDENT LOCATOR CARDS/CLASS SCHEDULES	OFM	3 years or until completion of State Auditor's examination report.	SD51-05F-09 Rev. 0	

**SUPERSEDED**



<b>6.6. TEACHING RECORDS</b>					
ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
6.6.1	GRADE DOCUMENTATION – ELEMENTARY To provide documentation for grades.	OFM	1 year.	SD51-06E-01 Rev. 0	
6.6.2	GRADE DOCUMENTATION – SECONDARY To provide documentation for grade and credit record challenges. Includes records that document state graduation requirements, such as Culminating Project.	OFM	5 years.	SD51-06E-02 Rev. 0	WAC 180-51-061.
6.6.3	LESSON PLANS	OFM	1 year.	SD51-06E-03 Rev. 0	
6.6.4	STATEMENT OF REQUIREMENTS AND EXPECTATIONS, SIGNED AND RETURNED BY PARENT/GUARDIAN	OFM	Retain for current school year.	SD51-06E-04 Rev. 0	

**SUPERSEDED**





## 7. STUDENT MANAGEMENT AND SERVICES

### 7.1. ATHLETICS

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.1.1	ATHLETE/TEAM ACHIEVEMENT RECORDS – NON-WIAA	OPR	PERMANENT – 1 copy potential archival value. See remarks.	SD51-03-03 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
7.1.2	ATHLETE/TEAM ACHIEVEMENT RECORDS – WIAA	OPR	6 years – potential archival value. See remarks.	SD51-20-02 Rev. 0	Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
7.1.3	ATHLETIC AND ACTIVITY SURVEYS Self-evaluation survey on activities students would like to participate in and limitations of students, as required by Title IX.	OFM	5 years.	SD51-03-15 Rev. 0	Reference 34 CFR 106.41.
7.1.4	ATHLETIC ELIGIBILITY RECORDS Includes physicals, insurance, grade point, appeals, emergency information, and student registration. Excludes parent/legal guardian consent forms which are covered by SD51-06C-31.	OFM	3 years. See remarks.	SD51-03-04 Rev. 1	Primary copy of insurance on individuals should be kept with District insurance files.
7.1.5	LEAGUE REGISTRATION FORMS – ATHLETICS	OFM	3 years.	SD51-03-10 Rev. 0	



<b>7.1. ATHLETICS</b>					
ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.1.6	SCHEDULES – ATHLETICS Dates and locations of school games, meets, and matches for season and tournament play.	OFM	3 years.	SD51-03-11 Rev. 0	
7.1.7	SCHOOL PROTESTS OF GAMES	OFM	1 year.	SD51-03-12 Rev. 0	
7.1.8	SCOREBOOK, SCORESHEETS	OFM	1 year.	SD51-03-13 Rev. 0	
7.1.9	TEAM ROSTERS	OFM	3 years.	SD51-03-14 Rev. 0	

**SUPERSEDED**



## 7.2. ATTENDANCE / ABSENCE

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.2.1	<p><b>Attendance – School-Sponsored Activities, Events and Programs</b></p> <p>Records relating to student attendance at school-sponsored events and extra-curricular activities, such as field trips, music, science and athletic activities or competitions, traffic safety programs, safety patrol, etc. Includes travel away from school facilities.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"><li>• Notices and announcements;</li><li>• Sign-up sheets, rosters, registration forms;</li><li>• Parent/legal guardian permissions (approval for use of private vehicles, waiver of liability, emergency information, etc.);</li><li>• Chaperone/driver lists and information;</li><li>• Transportation arrangements (including bus trip requests/authorizations, ticket logs, private vehicle checklists, etc.).</li></ul> <p><i>Note: If an accident/incident occurs, these records are covered by CORE series GS50-06C-03, GS2010-081, GS50-01-10, and/or GS53-02-04.</i></p>	OPR	<b>Retain</b> for 6 years after end of school year then <b>Destroy</b> .	SD51-06C-31 Rev. 1	

SUPERSEDED



## 7.2. ATTENDANCE / ABSENCE

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.2.2	<p><b>Truancy Case Files</b></p> <p>Records relating to student absence where a truancy petition <u>has</u> been filed against the parent/legal guardian in accordance RCW 28A.225.035.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"><li>• Absence reports/profiles;</li><li>• Phone logs and correspondence (including email) to and from parent/legal guardian;</li><li>• Meeting and conference notes;</li><li>• Records documenting steps taken to eliminate or reduce student absence.</li><li>• Petitions to compel school attendance;</li><li>• Compulsory school attendance filing forms;</li><li>• Intervention plans;</li><li>• Truancy conference counseling forms.</li></ul>	OPR	<p>Retain for 6 years after case closed or 6 years after student leaves/withdraws from school district, whichever is later</p> <p><i>then</i> <b>Destroy.</b></p>	SD51-04-10 Rev. 1	



## 7.2. ATTENDANCE / ABSENCE

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.2.3	<p><b>Absence (Student) – Grades K-8</b> Records relating to student absence (excused and unexcused), where a truancy petition has <u>not</u> been filed. Includes, but is not limited to:</p> <ul style="list-style-type: none"><li>• Phone logs and correspondence (including email) to and from parent/legal guardian verifying student absence;</li><li>• Absence notifications and excuse notes from parent/legal guardian, medical provider, etc.;</li><li>• Meeting and conference notes;</li><li>• Records documenting steps taken to eliminate or reduce student absence.</li></ul> <p><i>Note: If a truancy petition is filed, these records become part of the truancy case file and are covered by SD51-04-10.</i></p>	OFM	Retain for 4 years after end of fiscal year or until completion of State Auditor's examination report, whichever is sooner, <i>then</i> <b>Destroy.</b>	SD51-04-01 Rev. 1	

SUPERSEDED



## 7.2. ATTENDANCE / ABSENCE

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.2.4	<p><b>Absence (Student) – Grades 9-12</b> Records relating to student absence (excused and unexcused), where a truancy petition has <u>not</u> been filed. Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Phone logs and correspondence (including email) to and from parent/legal guardian verifying student absence;</li> <li>• Absence notifications and excuse notes from parent/legal guardian, medical provider, etc.;</li> <li>• Meeting and conference notes;</li> <li>• Records documenting steps taken to eliminate or reduce student absence.</li> </ul> <p><i>Note: If a truancy petition is filed, these records become part of the truancy case file and are covered by SD51-04-10.</i></p>	OFM	<p>Retain for 1 year after end of fiscal year then <b>Destroy.</b></p>	SD2011-154 Rev. 0	
7.2.5	<p><b>Student Tracking</b> Recordings documenting student whereabouts while at school. Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Student sign in/sign out sheets, late arrival/early departure logs, etc.;</li> <li>• Temporary authorizations for bus and pick-up changes.</li> </ul>	OFM	<p>Retain until end of fiscal year then <b>Destroy.</b></p>	SD51-04-14 Rev. 1	

SUPERSEDED



## 7.2. ATTENDANCE / ABSENCE

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.2.6	<p><b>Attendance</b> Records documenting student presence or absence, <u>each day and/or period</u>, in all grade levels.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Attendance in all learning environments (classroom, alternative learning experience, pre-kindergarten programs administered by the agency, etc.);</li> <li>• Attendance cards, bubble sheets (including student identifiers), and all other source and supporting documentation;</li> <li>• Paper and/or electronic input;</li> <li>• All grade levels (Pre-K, K-12, etc.).</li> </ul> <p>Excludes grant-funded programs (Head Start, etc.) which are covered by records series in the Grants section of the <i>Local Government Common Records Retention Schedule (CORE)</i>.</p>	OFM	<p><b>Retain</b> for 4 years after end of fiscal year or until completion of State Auditor's examination report, whichever is sooner <i>then</i> <b>Destroy.</b></p>	SD51-04-05 Rev. 1	
7.2.7	<p><b>Truancy Petition/Disposition Log</b> Summary listing/log which tracks the filing and disposition of truancy petitions to compel school attendance.</p>	OFM	<p><b>Retain</b> for 6 years after last entry <i>then</i> <b>Destroy.</b></p>	SD51-04-07 Rev. 1	

SUPERSEDED



### 7.3. FOOD SERVICES

Reference RCW 28A.235 and WAC 392-157.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.3.1	CATERING REQUESTS Requests for use of kitchen and the supplying of food and labor.	OFM	3 years or until completion of State Auditor's examination report.	SD51-08-01 Rev. 0	
7.3.2	FOOD HANDLER'S PERMIT	OFM	Destroy when obsolete or superseded.	SD51-08-02 Rev. 0	
7.3.3	FOOD SERVICE ORDERS For supplies needed to operate school lunch program.	OFM	3 years or until completion of State Auditor's examination report.	SD51-08-03 Rev. 0	
7.3.4	FREE OR REDUCED-PRICE MEAL APPLICATION Applications for reduced-price or free meals in compliance with National School Lunch Act.	OPR	6 years after the last reimbursement based on the application.	SD51-08-04 Rev. 0	Federal audit requirements. Security of confidential information must be protected.  Reference USDA National School Lunch Program and School Breakfast Program, Provisions 1, 2, & 3 - Fact Sheet, and 7 CFR 210.
7.3.5	FREE OR REDUCED-PRICE MEAL APPLICATION VERIFICATIONS	OFM	Federal fiscal year plus 3 years.	SD51-08-15 Rev. 0	
7.3.6	HACCP PLAN (HAZARD ANALYSIS OF CRITICAL CONTROL POINTS PLAN) Plans and reports of standard operating procedures.	OPR	6 years.	SD51-20-04 Rev. 0	Reference WAC 246-215-181.

SUPERSEDED





### 7.3. FOOD SERVICES

Reference RCW 28A.235 and WAC 392-157.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.3.7	HEALTH INSPECTIONS Inspection of facility to ensure it meets federal and state standards.	OFM	Primary copy held by local health district/department.	SD51-08-14 Rev. 0	
7.3.8	MEAL AND MILK COUNT REPORTS AND DOCUMENTATION Record of daily meals and milk served.	OFM	3 years or until completion of State Auditor's examination report.	SD51-08-05 Rev. 0	Reference 7 CFR 210.
7.3.9	MEAL PRODUCTION RECORDS Records of amount of food prepared and served to meet meal patterns.	OFM	Federal fiscal year plus 3 years.	SD51-08-13 Rev. 0	
7.3.10	MEAL TICKET/CREDIT LOG Listing of meal tickets/credits issued, including number, date, name of purchaser, and/or recipient and amount paid.	OFM	3 years or until completion of State Auditor's examination report.	SD51-08-06 Rev. 0	
7.3.11	MEAL TICKETS Prepaid meal tickets.	OFM	3 years or until completion of State Auditor's examination report.	SD51-08-07 Rev. 0	
7.3.12	MENUS	OFM	Destroy when obsolete or superseded.	SD51-08-16 Rev. 0	
7.3.13	MONTHLY MEAL COUNT REIMBURSEMENT REPORT Includes monthly meal count and edit checks as supporting documentation.	OPR	6 years.	SD51-08-08 Rev. 0	



### 7.3. FOOD SERVICES

Reference RCW 28A.235 and WAC 392-157.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.3.14	SCHOOL BREAKFAST PROGRAM PLAN Includes plan and backup documentation submitted to OSPI for program approval.	OPR	Termination of plan plus 6 years.	SD51-08-09 Rev. 0	
7.3.15	SITE HEALTH PERMIT	OFM	Destroy when obsolete or superseded.	SD51-08-10 Rev. 0	
7.3.16	STOCK CONTROL RECORDS Listing of food items, supplies, and commodities used for manual count of inventory on hand. May be used to complete the F-196 report.	OFM	3 years or until completion of State Auditor's examination report.	SD51-08-11 Rev. 0	
7.3.17	STOCK INVENTORY REPORT SUMMARY Prepared from stock control records and food service orders. Lists quantities on hand, received, used and unit prices. May be used to complete the F-196 report.	OFM	3 years or until completion of State Auditor's examination report.	SD51-08-12 Rev. 0	

**SUPERSEDED**



#### 7.4. HEALTH SERVICES

Reference RCW 4.16.350 & 28A.210.260, WAC 246.100.166, 246.760 & 246.762.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.4.1	APPLICATION FOR HOME/HOSPITAL TUTORING	OPR	6 years.	SD51-09-01 Rev. 0	
7.4.2	CERTIFICATE OF IMMUNIZATION STATUS (CIS) Dept. of Health Form No. 348-013.	OFM	Destroy after termination of enrollment.	SD51-09-02 Rev. 0	
7.4.3	CHILD ABUSE REPORTS Reports compiled by district personnel regarding students who may be victims of abuse. Submitted to DSHS Child Protective Services.	OPR	6 years.	SD51-09-03 Rev. 0	
7.4.4	COMMUNICABLE DISEASE REPORT Includes data collected from schools and summary report.	OFM	Destroy after summary report is submitted to local Health Department.	SD51-09-04 Rev. 0	
7.4.5	HEALTH ROOM/NURSE ENCOUNTER DATA (NED) Vital statistics, assessment, care and intervention.	OPR	8 years after last interaction.	SD51-20-05 Rev. 0	
7.4.6	HEALTH ROOM REGISTRY Log of students reporting to health office because of illness/injury.	OFM	8 years after last entry – See remarks.	SD51-09-05 Rev. 0	Reference RCW 4.16.350.
7.4.7	HEALTH SCREENING RESULTS Includes the following tests: Scoliosis (mandatory), Vision (mandatory), Hearing (mandatory), and Dental (optional).	OFM	Destroy after data is transferred to Student Health Card or Folder.	SD51-09-06 Rev. 0	



#### 7.4. HEALTH SERVICES

Reference RCW 4.16.350 & 28A.210.260, WAC 246.100.166, 246.760 & 246.762.

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.4.8	INDIVIDUAL HEALTH PLAN (IHP) For students with life-threatening health conditions.	OPR	8 years after last interaction.	SD51-20-06 Rev. 0	
7.4.9	MEDICATION ADMINISTRATION DAILY LOG A chronological listing of the dosages administered.	OPR	8 years after last dose administered – See remarks.	SD51-09-08 Rev. 0	Reference RCW 4.16.350.
7.4.10	MEDICATION/HEALTH PROCEDURES ADMINISTRATION CASE FILES Includes physician/parent/legal guardian authorization for medication/health procedures administration and account of number and dosages administered.	OPR	8 years after last dose/procedure administered – See remarks.	SD51-09-07 Rev. 0	Reference RCW 4.16.350.
7.4.11	STUDENT HEALTH CARD OR FOLDER May include but is not limited to screening results, data recorded from information submitted by physician/parent/legal guardian, and record of notification to parent/legal guardian.	OFM	2 years after graduation or withdrawal.	SD51-09-09 Rev. 0	Reference RCW 4.16.350.



7.5. STUDENT ENROLLMENT / ASSIGNMENT					
ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.5.1	BOUNDARY EXCEPTION APPEALS – NON-RESIDENT STUDENT Appeals filed by students residing outside the district.	OPR	Office of the Superintendent of Public Instruction (OSPI) – Legal Services retains until case closed plus 10 years.	SD51-05J-01 Rev. 0	Reference RCW 28A.225.225 and 230, and WAC 392-137.
7.5.2	BOUNDARY EXCEPTION APPEALS – RESIDENT STUDENT Appeals filed by students residing within the district.	OPR	Resolution plus 3 years.	SD51-05J-07 Rev. 0	Reference RCW 28A.225.225 and 230, and WAC 392-137.
7.5.3	BOUNDARY EXCEPTIONS Records documenting inter-district and intra-district boundary exceptions.	OPR	Current school year plus 6 years.	SD51-05J-02 Rev. 0	
7.5.4	<b>Enrollment</b> Records documenting student entry into or withdrawal from the school/district.	OPR	<b>Retain</b> for 2 years after student leaves/withdraws from school/district <u>and</u> completion of State Auditor’s examination report <i>then</i> <b>Destroy.</b>	SD51-05J-04 Rev. 1	
7.5.5	PARENT/LEGAL GUARDIAN ASSIGNMENT REQUEST FORMS Generates student’s assignment to a school.	OPR	3 years.	SD51-05J-03 Rev. 0	

SUPERSEDED



## 7.5. STUDENT ENROLLMENT / ASSIGNMENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.5.6	SCHOOL ASSIGNMENT PROCEDURES Records documenting school assignment procedures where not incorporated in School Board Minutes and/or Resolutions. <i>See DAN GS50-05A-13 for SCHOOL BOARD MINUTES.</i>	OPR	6 years after superseded Potential archival value – See remarks.	SD51-05J-05 Rev. 0	Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch.
7.5.7	STUDENT ASSIGNMENT CASE FILES Includes all documentation related to the assignment of a specific student to a school.	OPR	3 years.	SD51-05J-06 Rev. 0	If a student does not enroll, secondary copy may be destroyed.

**SUPERSEDED**



## 7.6. STUDENT TRANSPORTATION

Reference RCW 28A.160

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
7.6.1	APPLICATION FOR SPECIAL TRANSPORTATION – ACCEPTED For students with medical problems, or physical disabilities to receive district transportation services.	OFM	Retain until completion of audit.	SD51-05G-02 Rev. 0	Reference WAC 392-141-148.
7.6.2	APPLICATION FOR SPECIAL TRANSPORTATION – DENIED	OFM	Application denied plus 1 year.	SD51-05G-14 Rev. 0	
7.6.3	IMPROPER CONDUCT ON THE BUS NOTICE May show bus route, time of incident, nature of incident, and student(s) name(s).	OFM	1 year.	SD51-05G-13 Rev. 0	

**SUPERSEDED**



## 8. SUPERINTENDENT

ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
8.1.1	ACCREDITATION CERTIFICATES	OPR	PERMANENT.	SD51-05-01 Rev. 0	
8.1.2	ANNUAL HIGH SCHOOL REPORT FOR STANDARDS AND ACCREDITATION	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-05-10 Rev. 0	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.
8.1.3	BOUNDARY RECORDS Official legal description and drawings of school district boundaries, including director district boundaries.	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-05-02 Rev. 0	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.
8.1.4	CERTIFICATION OF ELECTION OF SCHOOL BOARD PRESIDENT	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-05-03 Rev. 0	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.  MICROFILM: This records series may be retained permanently on microfilm instead of hard copy for both on-site use and off-site security storage at the State Archives. Microfilm must meet Washington State Archives technical standards.





ITEM NO.	SERIES TITLE AND DESCRIPTION	OPR or OFM	PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY	DISPOSITION AUTHORITY NUMBER (DAN)	REMARKS
8.1.5	CERTIFICATION OF SCHOOL DISTRICT ELECTIONS Including bonds, levies, and director elections.	OPR	PERMANENT.	SD51-05-04 Rev. 0	
8.1.6	OFFICIAL DISTRICT NEGOTIATED SCHOOL CALENDARS	OPR	PERMANENT.	SD51-05-06 Rev. 0	
8.1.7	REPORT OF EVALUATION OF ACCREDITATION	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-05-11 Rev. 0	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.
8.1.8	SCHOOL SERVICE BOUNDARY DECISION WORKING FILE	OFM	Approval of Board Resolution plus 3 years.	SD51-05-08 Rev. 0	
8.1.9	STATEMENTS OF GRADUATION REQUIREMENTS	OPR	PERMANENT – 1 copy potential archival value – See remarks.	SD51-05-13 Rev. 0	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



## GLOSSARY

### ***Appraisal***

The process of determining the value and disposition of records based on their current administrative, legal, and fiscal use; their evidential and informational or research value; and their relationship to other records.

### ***Archival (Appraisal Required)***

Public records which may possess enduring legal and/or historic value and must be appraised by the Washington State Archives on an individual basis.

*Public records will be evaluated, sampled, and weeded according to archival principles by archivists from Washington State Archives (WSA). Records not selected for retention by WSA may be disposed of after appraisal.*

### ***Archival (Permanent Retention)***

Public records which possess enduring legal and/or historic value and must not be destroyed. Local government agencies must either transfer these records to Washington State Archives or retain and preserve these records according to archival best practices until such time as they are transferred to Washington State Archives (WSA).

*WSA will not sample, weed, or otherwise dispose of records fitting the records series description designated as "Archival (Permanent Retention)" other than the removal of duplicates. Master indexes, lists, registers, tracking systems, databases and other finding aids for public records designated as Archival should be retained with the records and transferred to Washington State Archives.*

### ***Disposition***

Actions taken with records when they are no longer required to be retained by the agency.

*Possible disposition actions include transfer to Washington State Archives and destruction.*

### ***Disposition Authority Number (DAN)***

Control numbers systematically assigned to records series or records retention schedules when they are approved by the Local Records Committee.

### ***Essential Records/Possibly Essential***

Public records that local government agencies must have in order to maintain or resume business continuity following a disaster. While the retention requirements for essential records may range from very short-term to archival, these records are necessary for an agency to resume its core functions following a disaster.

*Security backups of these public records should be created and may be deposited with Washington State Archives in accordance with chapter 40.10 RCW. Copies of master indexes, lists, registers, tracking systems, databases and other finding aids should also be transferred with the records.*



### **Local Records Committee**

The committee established by RCW 40.14.070 to review and approve disposition of local government records.

*Its three members include the State Archivist and one representative each from the Offices of the Attorney General and State Auditor.*

### **Migration**

The periodic transfer of data from one electronic system to another in order to ensure continued integrity and accessibility of data despite changes over time in hardware, software, and storage media.

### **Non-Archival**

Public records which do not possess sufficient historic value to be designated as "Archival". Agencies must retain these records for the minimum retention period specified by the appropriate, current records retention schedule.

*Agencies should destroy these records after their minimum retention period expires, provided that the records are not required for litigation, public records requests, or other purposes required by law.*

### **Non-Essential Records**

Public records which are not required in order for an agency to resume its core functions following a disaster, as described in chapter 40.10 RCW.

### **Obsolete**

Public records which are no longer relevant to current program or primary functional responsibilities of a department or office.

### **Office of Record**

The group, department, or office within an agency responsible for maintaining a primary record from creation (or receipt) through disposition.

### **OFM (Office Files and Memoranda)**

Public records which have been designated as "Office Files and Memoranda" for the purposes of RCW 40.14.010.

*RCW 40.14.010 – Definition and classification of public records.*

*(2) "Office files and memoranda include such records as correspondence, exhibits, drawings, maps, completed forms, or documents not above defined and classified as official public records; duplicate copies of official public records filed with any agency of the state of Washington; documents and reports made for the internal administration of the office to which they pertain but not required by law to be filed or kept with such agency; and other documents or records as determined by the records committee to be office files and memoranda."*



### **OPR (Official Public Records)**

Public records which have been designated as “Official Public Records” for the purposes of RCW 40.14.010.

*RCW 40.14.010 – Definition and classification of public records.*

*(1) “Official public records shall include all original vouchers, receipts, and other documents necessary to isolate and prove the validity of every transaction relating to the receipt, use, and disposition of all public property and public income from all sources whatsoever; all agreements and contracts to which the state of Washington or any agency thereof may be a party; all fidelity, surety, and performance bonds; all claims filed against the state of Washington or any agency thereof; all records or documents required by law to be filed with or kept by any agency of the state of Washington; ... and all other documents or records determined by the records committee... to be official public records.”*

### **Primary Records**

The original record (whether created or received by the agency) which serves as the official record, and must be retained in accordance with a current approved records retention schedule.

### **Public Records**

**RCW 40.14.010 – Definition and classification of public records.**

*“... The term “public records” shall include any paper, correspondence, completed form, bound record book, photograph, film, sound recording, map drawing, machine-readable material, compact disc meeting current industry ISO specifications, or other document, regardless of physical form or characteristics, and including such copies thereof, that have been made by or received by any agency of the state of Washington in connection with the transaction of public business...”*

### **Records Series**

A group of records, performing a specific function, which is used as a unit, filed as a unit, and may be transferred or destroyed as a unit. A records series may consist of a single type of form or a number of different types of documents that are filed together to document a specific function.

### **Secondary Records**

Copies (or duplicates) of the agency’s primary records used for specific legal, fiscal, or administrative purposes.

*Secondary records exist for convenience of reference, or for informational purposes, and may be discarded when no longer needed for agency business in accordance with GS50-02-04.*

### **Security Microfilm**

Silver duplicate or first-generation microfilm which is stored at Washington State Archives under strictly-controlled environmental conditions and serves as an emergency/disaster back-up, in accordance with chapter 40.10 RCW.

*Washington State Archives provides security microfilm storage and inspection services to local government agencies.*



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