



**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.secstate.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 or Permanent must not be destroyed. Records designated as 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 previous versions of the *School Districts and Educational Service Districts Records Retention Schedules* are revoked. Agency heads should take measures to ensure that the retention and disposition of public records is in accordance with current, approved records retention schedules.

**Authority**

This records retention schedule was approved by the Local Records Committee in accordance with RCW 40.14.070 on July 30, 2009.

For the Attorney General: Cindy Evans

For the State Auditor: Mark Rapozo

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.  |

**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)*.

| <b>1.1. ADMINISTRATION (GENERAL)</b><br><i>The activity associated with the day-to-day operations of the agency. Includes short-term records that can be disposed of as part of normal administrative practice.</i> |  |            |  |                                      |                                    |         |
|---|--|------------|--|--------------------------------------|------------------------------------|---------|
| ITEM NO.  | SERIES TITLE AND DESCRIPTION                             | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 1.1.1   | SUPERINTENDENT OF PUBLIC INSTRUCTION BULLETINS/MEMORANDA | OFM        | Destroy after superseded or expired.           | Destroy when obsolete or superseded. | SD51-01-48                         |         |

SUPERSEDED



## 1.2. 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                    | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|---|------------|---|--------------------------------------|------------------------------------|---|
| 1.2.1    | ASSOCIATED STUDENT BODY (ASB) – BYLAWS<br>REV: Changed title. 07/2008 | OPR        | PERMANENT – 1 copy potential archival value – <b>See remarks.</b> | Destroy when obsolete or superseded  | SD51-01-08                         | Contact your Regional Archivist. Records from the series may be selected to be transferred and preserved at a Regional Archives Branch.     |
| 1.2.2    | ASSOCIATED STUDENT BODY (ASB) – MINUTES<br>New series. 07/2008        | OPR        | PERMANENT – 1 copy potential archival value – <b>See remarks.</b> | Destroy when obsolete or superseded. | SD51-20-01                         | Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. |





**1.3. COMMUNITY RELATIONS**

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

| ITEM NO. | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY | SECONDARY (ALL OTHER) RECORD COPIES | DISPOSITION AUTHORITY NUMBER (DAN)                             | REMARKS |
|----------|--|------------|--|-------------------------------------|--|---------|
|          | <p><i>(continued from previous page)</i></p> <p>HISTORICAL RECORDS, MATERIALS AND ARTIFACTS THAT SHOULD BE RETAINED FOR COMMEMORATIVE EVENTS AND DISPLAYS</p> <ul style="list-style-type: none"> <li>• Diploma Order Lists</li> <li>• Exhibits</li> <li>• Final Grade Point Summaries</li> <li>• Graduating Class History Files</li> <li>• Honor Roll Lists</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> <p>REV: Changed title and description.<br/>07/2008</p> |            |  |                                     | <p>SD51-01-52</p> <p><i>(continued from previous page)</i></p> |         |

SUPERSEDED





### 1.3. COMMUNITY RELATIONS

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

| ITEM NO. | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|--|------------|--|--------------------------------------|------------------------------------|---------|
| 1.3.3    | PHOTO/MEDIA RELEASE FORM – EXTERNAL<br>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.<br><br>New series. 07/2008   | OFM        | 3 years after end of school year.              | Destroy when obsolete or superseded. | SD51-20-08                         |         |
| 1.3.4    | PHOTO/MEDIA RELEASE FORM – INTERNAL<br>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.<br><br>REV: Changed title, added description, and assigned new DAN. 07/2008 | OFM        | Retain for current school year.                | Destroy when obsolete or superseded. | SD51-20-09                         |         |

**SUPERSEDED**



**1.3. COMMUNITY RELATIONS**

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

| ITEM NO. | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY  | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|---|------------|---|--------------------------------------|------------------------------------|---|
| 1.3.5    | PUBLIC RESEARCH ACCESS REQUEST<br>Request for access to district records for research purposes.<br><br><i>See DAN GS50-09-04 for public disclosure requests.</i><br><br>REV: Changed description. 07/2008 | OFM        | Resolution of request plus 3 years.   | Destroy when obsolete or superseded. | SD51-01-35                         |   |
| 1.3.6    | PUBLIC RESEARCH ACCESS REQUEST LOG  | OFM        | Last entry in log plus 3 years.   | Destroy when obsolete or superseded. | SD51-01-39                         |   |
| 1.3.7    | SCHOOL BULLETINS AND NEWSPAPERS<br><br>REV: Changed primary retention and added remarks. 07/2008  | OFM        | Retain until appraised by Regional Archivist.<br>Potential archival value.<br><b>See remarks.</b> | Destroy when obsolete or superseded. | SD51-06F-03                        | These records must be appraised by your Regional Archivist. Contact your Regional Archives to arrange for appraisal and transfer. |
| 1.3.8    | STUDENT HANDBOOK/CALENDAR<br><br>REV: Changed primary retention and added remarks.  | OFM        | Retain until appraised by Regional Archivist.<br>Potential archival value.<br><b>See remarks.</b> | Destroy when obsolete or superseded. | SD51-06F-04                        | These records must be appraised by your Regional Archivist. Contact your Regional Archives to arrange for appraisal and transfer. |

SUPERSEDED



**1.4. 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                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|--|------------|--|--------------------------------------|------------------------------------|---------|
| 1.4.1    | VENDOR FILES<br>Includes vendor lists, changes, additions, and deletions.<br><br>REV: Changed primary retention. 07/2008 | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-02-30                         |         |

**SUPERSEDED**



**1.5. 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                                | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|--|------------|---|--------------------------------------|------------------------------------|---------|
| 1.5.1    | DEMOGRAPHIC AND ENROLLMENT PROJECTIONS                   | OFM        | 3 years.  | Destroy when obsolete or superseded. | SD51-07-08                         |         |
| 1.5.2    | REPORTS REQUIRED BY SUPERINTENDENT OF PUBLIC INSTRUCTION | OFM        | Superintendent of Public Instruction retains primary record copy – PERMANENT. | 3 years.                             | SD51-01-37                         |         |

**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   | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|---|------------|--|--------------------------------------|------------------------------------|---|
| 1.6.1    | ACCIDENT CLAIMS/INCIDENT REPORTS – STUDENT<br>Records documenting accident claims/reports where official record is retained by Insurance/Risk Management/Safety Office in accordance with DAN GS50-06C-12.<br><br>REV: Changed description, primary and secondary retention, and DAN. 07/2008 | OFM        | Destroy at end of school year.   | Destroy when obsolete or superseded. | SD51-20-11                         |   |
| 1.6.2    | APPROVAL FOR USE OF PRIVATE VEHICLES FOR STUDENT TRANSPORTATION – WITH ACCIDENT/INCIDENT<br><br>New series. 07/2008   | OPR        | Destroy after student reaches age 21, or 3 years after accident/incident, whichever is longer. | Destroy when obsolete or superseded. | SD51-20-07                         | Reference Washington State Board of Education Resolution #101-1996. Type II authorization standards as recommended by OPSI. |
| 1.6.3    | APPROVAL FOR USE OF PRIVATE VEHICLES FOR STUDENT TRANSPORTATION – WITHOUT ACCIDENT/INCIDENT<br><br>REV: Changed title and primary retention; added remarks. 07/2008   | OPR        | Destroy after 6 years.   | Destroy when obsolete or superseded. | SD51-06C-05                        | Reference Washington State Board of Education Resolution #101-1996. Type II authorization standards as recommended by OPSI. |

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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|--|------------|--|--------------------------------------|------------------------------------|---------|
| 1.6.4    | EMERGENCY INFORMATION FORM FOR STUDENTS AND STAFF  | OFM        | Retain for current school year.                | Destroy when obsolete or superseded. | SD51-01-51                         |         |
| 1.6.5    | FIELD TRIP AUTHORIZATION BY PARENT/LEGAL GUARDIAN  | OPR        | 6 years.                                       | Destroy when obsolete or superseded. | SD51-06C-31                        |         |
| 1.6.6    | INSURANCE CERTIFICATES<br>Insurance where the school district is a third party. Provides protection to district in case of incident/accident during event/activity.<br><br>REV: Changed title and added description. 07/2008 | OFM        | Expiration of certificate plus 3 years.        | Destroy when obsolete or superseded. | SD51-05C-32                        |         |

**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. MAINTENANCE  |  |            |  |                                      |                                    |         |
|---|--|------------|--|--------------------------------------|------------------------------------|---------|
| <i>The activity of repairing or servicing the assets of the local government agency. Includes buildings, vehicles, and equipment.</i> |  |            |  |                                      |                                    |         |
| ITEM NO.  | SERIES TITLE AND DESCRIPTION                                   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 2.1.1   | BUS CONDITION CHECKLIST<br>Daily evaluation of bus by drivers. | OFM        | 1 year.  | Destroy when obsolete or superseded. | SD51-05G-04                        |         |

**SUPERSEDED**



## 2.2. 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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|---|------------|--|--------------------------------------|------------------------------------|---------|
| 2.2.1    | BUS OPERATIONS DAILY LOG<br>May show bus route, time trip began and ended, number of pupils carried, and driver's signature.  | OPR        | 6 years.                                       | Destroy when obsolete or superseded. | SD51-05G-06                        |         |
| 2.2.2    | BUS SCHEDULE FOR ALL SCHOOLS<br>Shows route, stops and time for each bus. Includes state approved route map.  | OFM        | 3 years.                                       | Until revised.                       | SD51-05G-07                        |         |
| 2.2.3    | BUS TRIP REQUEST/AUTHORIZATION<br>May show school, nature of trip, date, destination, miles, number of pupils, supervisor, departure, and time.                             | OFM        | 3 years.                                       | Destroy when obsolete or superseded. | SD51-05G-08                        |         |
| 2.2.4    | BUS TRIP TICKET LOGS<br>May show school, nature of trip, date, destination, miles, number or pupils, supervisor, departure, and times.                                      | OPR        | 6 years.                                       | Destroy when obsolete or superseded. | SD51-05G-09                        |         |
| 2.2.5    | FUEL/OIL RECORDS FOR INDIVIDUAL BUSES AND OTHER VEHICLES<br>May list vehicle number, amount of fuel pumped, odometer reading, etc.<br><br>REV: Changed description. 07/2008 | OFM        | 3 years.                                       | Destroy when obsolete or superseded. | SD51-05G-12                        |         |





### 3. EDUCATIONAL SERVICE DISTRICTS

| 3.1. ADMINISTRATION<br><i>Reference RCW 28A.310.</i> |  |            |   |                                     |                                    |   |
|--|--|------------|---|-------------------------------------|------------------------------------|---|
| ITEM NO.   | SERIES TITLE AND DESCRIPTION                       | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY  | SECONDARY (ALL OTHER) RECORD COPIES | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
| 3.1.1  | BOARD AND REGIONAL COMMITTEE ELECTION CERTIFICATES | OPR        | PERMANENT.  | Destroy when obsolete or superseded | SD51-11-01                         |   |
| 3.1.2  | BOUNDARY RECORDS                                   | OPR        | PERMANENT – 1 copy potential archival value.  | Destroy when obsolete or superseded | SD51-11-02                         | 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. | Destroy when obsolete or superseded | SD51-11-03                         | 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                                      | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|--|------------|---|--------------------------------------|------------------------------------|---|
| 3.2.1    | CLASS/WORKSHOP RECORDS<br>If offered for fee or credit.                                    | OPR        | 6 years after close of fiscal year.   | Destroy when obsolete or superseded. | SD51-13-01                         |   |
| 3.2.2    | CLOCK HOUR RECORDS<br><br>REV: Changed title and primary retention; added remarks. 07/2008 | OPR        | 7 years.  | Destroy when obsolete or superseded. | SD51-12-01                         | WAC 181-85-205  |
| 3.2.3    | INSERVICE ATTENDANCE REPORTS   | OPR        | 6 years after close of fiscal year.   | Destroy when obsolete or superseded. | SD51-12-02                         |   |
| 3.2.4    | OSPI (OFFICE OF THE SUPERINTENDENT OF PUBLIC INSTRUCTION) MONITORING REPORTS               | OPR        | 6 years after close of fiscal year.   | Destroy when obsolete or superseded. | SD51-12-03                         |   |
| 3.2.5    | PROGRAM APPLICATIONS   | OPR        | 6 years after close of fiscal year.   | Destroy when obsolete or superseded. | SD51-12-04                         |   |
| 3.2.6    | REGIONAL DRUG AND ALCOHOL SURVEYS  | OFM        | 6 years after close of fiscal year – potential archival value – <b>See remarks.</b> | Destroy when obsolete or superseded. | SD51-12-05                         | 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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|---|------------|--|--------------------------------------|------------------------------------|---------|
| 3.3.1    | LEARNING RESOURCE CENTER (LRC) SELECTION ADVISORY COMMITTEE PURCHASE RECOMMENDATIONS (VOTING TABULATION)<br><br>REV: Changed title. 07/2008 | OPR        | 3 years after close of fiscal year.            | Destroy when obsolete or superseded. | SD51-13-03                         |         |
| 3.3.2    | TEACHER EVALUATION FORMS OF LEARNING RESOURCE CENTER (LRC) COLLECTIONS<br>Includes files, etc.<br><br>REV: Changed title. 07/2008           | OPR        | 3 years after close of fiscal year.            | Destroy when obsolete or superseded. | SD51-13-04                         |         |

**SUPERSEDED**



### 3.4. TEACHER CERTIFICATION

*Reference RCW 28A.310.*

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

**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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|---------------------------------|------------|--|--------------------------------------|------------------------------------|---------|
| 4.1.1    | STUDENT FEE AND FINE STATEMENTS | OFM        | 3 years.                                       | Destroy when obsolete or superseded. | SD51-02-27                         |         |

**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          | SECONDARY (ALL OTHER) RECORD COPIES   | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|---|------------|---|---|------------------------------------|---------|
| 4.2.1    | APPORTIONMENT REPORTS/STATE OF WASHINGTON<br>All reports supporting state funding (i.e., enrollment). | OPR        | Superintendent of Public Instruction retains PERMANENT. | Retain 1 copy for 3 years or destroy after completion of audit. All other copies destroy when obsolete or superseded. | SD51-02-03                         |         |
| 4.2.2    | BUDGET REVISION REQUESTS<br>Formal requests to revise a budget that has already been adopted.         | OPR        | 6 years.  | Destroy when obsolete or superseded   | SD51-02A-04                        |         |

**SUPERSEDED**



### 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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|---|------------|--|--------------------------------------|------------------------------------|---------|
| 4.3.1    | NON-FEDERAL AND/OR NON-STATE GRANTS ISSUED – SUCCESSFUL APPLICATION ADMINISTRATION FILES<br>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.             | Destroy when obsolete or superseded. | SD51-03C-14                        |         |

**SUPERSEDED**



**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  | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS               |
|----------|--|------------|---|--------------------------------------|------------------------------------|-----------------------|
| 4.3.2    | STATE GRANTS ISSUED – SUCCESSFUL APPLICATION ADMINISTRATION<br>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. | Destroy when obsolete or superseded. | SD51-03C-15                        |                       |
| 4.3.3    | SURVEY OF PARENTS OR LEGAL GUARDIANS LIVING OR WORKING ON FEDERAL PROPERTY (Public Law 81-874) – ELIGIBLE<br><br>REV: Changed title. 07/2008   | OPR        | 5 years after receipt of final payment – See remarks.                                   | Destroy when obsolete or superseded. | SD51-03C-16                        | Reference 34 CFR 222. |
| 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.  | Destroy when obsolete or superseded. | SD51-03C-17                        |                       |

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                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|---|------------|--|--------------------------------------|------------------------------------|---------|
| 4.4.1    | PAYROLL STATUS SHEETS FOR DISTRICTS NOT USING PERSONNEL ACTION REQUEST FORMS<br><br>REV: Changed primary retention. 07/2008 | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-03E-28                        |         |
| 4.4.2    | PAYROLL STATUS SHEETS FOR DISTRICTS USING PERSONNEL ACTION REQUEST FORMS  | OFM        | Until data entered and verified.                                   | Destroy when obsolete or superseded. | SD51-03E-26                        |         |



## 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<br><i>The activity of ensuring fairness and equal opportunities for all employees.</i> |  |            |  |                                      |                                    |         |
|--|--|------------|--|--------------------------------------|------------------------------------|---------|
| ITEM NO.   | SERIES TITLE AND DESCRIPTION               | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 5.1.1  | EQUAL EMPLOYMENT OPPORTUNITY INQUIRY (EEO) | OFM        | 3 years.                                       | Destroy when obsolete or superseded. | SD51-04C-02                        |         |

**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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|--|------------|--|--------------------------------------|------------------------------------|---------|
| 5.2.1    | SIGNATURE OF RECEIPT RECORD<br>Receipts or lists signed by employees to verify receipt of instructions, or documents such as paychecks, leave/benefit reports, retirement system accounting statements, etc. | OFM        | 1 year.  | Destroy when obsolete or superseded. | SD51-01-46                         |         |

**SUPERSEDED**



**5.3. STAFF DEVELOPMENT / TRAINING**

*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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|--|------------|--|--------------------------------------|------------------------------------|---|
| 5.3.1    | APPROVED IN-SERVICE EDUCATION<br>Clock hour credit activities.   | OPR        | 7 years.                                       | Destroy when obsolete or superseded. | SD51-04G-01                        | Reference WAC 180-85-205.   |
| 5.3.2    | FIRST AID/CPR TRAINING<br>DOCUMENTATION  | OPR        | Destroy when superseded plus six years.        | Destroy when obsolete or superseded. | SD51-01-22                         |   |
| 5.3.3    | LIST OF HIV AND HBV TRAINED<br>EMPLOYEES   | OPR        | 30 years.                                      | Destroy when obsolete or superseded. | SD51-04G-03                        |   |
| 5.3.4    | STAFF TRAINING, ASSISTANCE, AND<br>REVIEW PROGRAM CASE FILES<br>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.                | Destroy when obsolete or superseded. | SD51-04G-05                        | <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   | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
| 6.1.1                         | ACCREDITATION REPORTS AND EVALUATION REPORTS<br>Separate evaluations of all district reports subject to review.   | OPR        | Destroy when superseded plus 6 years – potential archival value – See remarks.                           | Destroy when obsolete or superseded. | SD51-06A-01                        | 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<br>1. State categorical programs: Student lists, test scores, inventory of equipment, legal reports, evaluations and assurances to be maintained for monitoring and auditing purposes.<br>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. | Destroy when obsolete or superseded. | SD51-06A-02                        | 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.   | Destroy when obsolete or superseded. | SD51-06A-03                        |   |



| 6.1. CURRICULUM / INSTRUCTION |   |            |  |                                      |                                    |   |
|-------------------------------|---|------------|--|--------------------------------------|------------------------------------|---|
| ITEM NO.                      | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY             | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
| 6.1.4                         | COURSE ADDITIONS, DELETIONS, AND CHANGES  | OFM        | 3 years.   | Destroy when obsolete or superseded. | SD51-06A-04                        |   |
| 6.1.5                         | COURSE DESCRIPTION CATALOG  | OPR        | PERMANENT.   | Destroy when obsolete or superseded. | SD51-06A-19                        |   |
| 6.1.6                         | CURRICULUM SUMMARIES AND GUIDES   | OFM        | PERMANENT – 1 copy potential archival value – See remarks. | Destroy when obsolete or superseded. | SD51-06A-05                        | 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<br>Documents received from legal guardian excusing student from specific classes (i.e., Physical Education because of injury, etc.)<br><br>REV: Changed title, description, and primary retention. 07/2008 | OPR        | 5 years.   | Destroy when obsolete or superseded. | SD51-06A-11                        |   |

SUPERSEDED



| 6.1. CURRICULUM / INSTRUCTION |   |            |  |  |                                    |   |
|-------------------------------|---|------------|--|--|------------------------------------|---|
| ITEM NO.                      | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY             | SECONDARY (ALL OTHER) RECORD COPIES                  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
| 6.1.8                         | ESSENTIAL ACADEMIC LEARNING REQUIREMENTS (EALR) PROGRAM FILES<br>1. A complete set of student learning objectives for each core subject.<br>2. Community input data for development of EALR student learning objectives.<br>3. Evaluation data for each EALR<br>REV: Changed title and description. 07/2008 | OFM        | Destroy when superseded.                                   | Destroy when obsolete or superseded.                 | SD51-06A-06                        |   |
| 6.1.9                         | ESSENTIAL ACADEMIC LEARNING REQUIREMENTS (EALR) PROGRAM FILES RESULTS<br>REV: Changed title. 07/2008  | OFM        | Destroy after compilation and issuance of test data.       | Destroy after compilation and issuance of test data. | SD51-06A-07                        |   |
| 6.1.10                        | GRADUATION REQUIREMENTS STATEMENTS<br>Statement of required courses and credits that is approved by the Board.<br>REV: Added description. 07/2008   | OPR        | PERMANENT – 1 copy potential archival value – See remarks. | Destroy when obsolete or superseded.                 | SD51-06A-08                        | 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> |  |                   |  |  |   |   |
|--------------------------------------|--|-------------------|--|--|---|---|
| <b>ITEM NO.</b>                      | <b>SERIES TITLE AND DESCRIPTION</b>  | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b>  | <b>SECONDARY (ALL OTHER) RECORD COPIES</b>           | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b>  |
| 6.1.11                               | INDIVIDUAL ESSENTIAL ACADEMIC LEARNING REPORTS<br><br>REV: Changed title. 07/2008  | OFM               | Destroy after compilation and issuance of test data.   | Destroy after compilation and issuance of test data. | SD51-06A-09                               |   |
| 6.1.12                               | INSTRUCTIONAL MATERIALS SUBJECT FILE<br>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).<br><br>REV: Changed description and primary retention. 07/2008 | OFM               | 3 years.   | Destroy when obsolete or superseded.                 | SD51-06A-10                               |   |
| 6.1.13                               | PARENT/LEGAL GUARDIAN PERMISSION SLIPS FOR INTERNET ACCESS AND FILM VIEWING<br><br>REV: Changed title. 07/2008   | OFM               | Retain for current school year.  | Destroy when obsolete or superseded.                 | SD51-06A-12                               |   |
| 6.1.14                               | SCHOOL MASTER SCHEDULE<br>Class schedule unique to each school.<br><br>New series. 07/2008   | OFM               | 6 years, and then retain until appraised by Regional Archivist. Potential archival value. See remarks. | Destroy when obsolete or superseded.                 | SD51-20-03                                | These records must be appraised by your Regional Archivist. Contact your Regional Archives to arrange for appraisal and transfer. |





| 6.1. CURRICULUM / INSTRUCTION |  |            |   |                                      |                                    |         |
|-------------------------------|--|------------|---|--------------------------------------|------------------------------------|---------|
| ITEM NO.                      | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY  | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 6.1.15                        | STATEMENT OF REQUIREMENTS AND EXPECTATIONS SIGNED AND RETURNED BY PARENT/LEGAL GUARDIAN  | OFM        | Retain for current school year.                 | Destroy when obsolete or superseded. | SD51-01-49                         |         |
| 6.1.16                        | STUDENT ASSESSMENT AND PLACEMENT PROGRAM CASE FILES  | OFM        | 1 year after screening.                         | Destroy when obsolete or superseded. | SD51-06A-13                        |         |
| 6.1.17                        | STUDENT TESTING – GROUP REPORTS<br>Summary of testing scores by class, grade, program, sex, ethnic group, building, district, etc. | OFM        | 5 years.  | Destroy when obsolete or superseded. | SD51-06A-16                        |         |
| 6.1.18                        | STUDENT TESTING – INDIVIDUAL STUDENT REPORT  | OFM        | Destroy 2 years after graduation or withdrawal. | Destroy when obsolete or superseded. | SD51-06A-17                        |         |
| 6.1.19                        | STUDENT TESTING – PRIMARY RECORD<br>Answer sheet or other medium completed by student.   | OFM        | 90 days.  | Destroy when obsolete or superseded. | SD51-06A-18                        |         |

SUPERSEDED



| 6.2. HOME-BASED INSTRUCTION<br><i>Reference RCW 28A.200</i> |   |            |  |                                      |                                    |         |
|---|---|------------|--|--------------------------------------|------------------------------------|---------|
| ITEM NO.  | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 6.2.1   | LIST OF SERVICES PROVIDED BY THE SCHOOL DISTRICT  | OPR        | 6 years.   | Destroy when obsolete or superseded. | SD51-09A-01                        |         |
| 6.2.2   | LIST OF STUDENTS PARTICIPATING IN HOME-BASED INSTRUCTION  | OPR        | 6 years.   | Destroy when obsolete or superseded. | SD51-09A-02                        |         |
| 6.2.3   | NOTICE OF TRANSFER OF HOME-BASED STUDENT TO DISTRICT<br>Documents the transfer of home-based students back to district schools.   | OFM        | File in Student Cumulative Records.                                | Destroy when obsolete or superseded. | SD51-09A-03                        |         |
| 6.2.4   | PARENT/LEGAL GUARDIAN DECLARATION OF INTENT<br>Annual statement of intent by parent/legal guardian to provide full-time or part-time home-schooling for an individual student.<br><br>REV: Changed primary retention. 07/2008 | OPR        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-09A-05                        |         |
| 6.2.5   | PLACEMENT/EVALUATION TEST RESULTS FOR STUDENTS ENTERING DISTRICT FROM HOME-BASED INSTRUCTION  | OFM        | 2 years after graduation or withdrawal.                            | Destroy when obsolete or superseded. | SD51-09A-06                        |         |

SUPERSEDED



| 6.3. SKILLS CENTER |   |            |  |                                      |                                    |  |
|--------------------|---|------------|--|--------------------------------------|------------------------------------|--|
| ITEM NO.           | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY   | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS  |
| 6.3.1              | <p>PATIENT CASE FILES<br/>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        | <p>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.</p> | Destroy when obsolete or superseded. | SD51-10-02                         | <p>Reference RCW 70.02.<br/>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.</p> |
| 6.3.2              | <p>SKILLS CENTER STUDENT TIME LOG/ SHEET<br/>Log/sheet recording a student’s presence/absence in a skills center course.</p> <p>REV: Changed primary retention and added remarks. 07/2008</p>                       | OFM        | <p>3 Years or until completion of State Auditor’s examination report.</p>  | Destroy when obsolete or superseded. | SD51-10-03                         | Reference WAC 392-117-050.   |

SUPERSEDED



| <b>6.4. SPECIAL EDUCATION STUDENT RECORDS</b> |  |                   |   |  |   |   |
|---|--|-------------------|---|--|---|---|
| <b>ITEM NO.</b>                               | <b>SERIES TITLE AND DESCRIPTION</b>  | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b> | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b>  |
| 6.4.1   | REPORT FOR STUDENT NOT ASSIGNED TO THE SPECIAL EDUCATION PROGRAM<br>Referrals, evaluations, evaluation reports, and notices for students determined not to be eligible for the special education program.<br><br>REV: Changed remarks. 07/2008                 | OFM               | Determined ineligible plus 5 years.                   | Destroy when obsolete or superseded.       | SD51-05I-04                               | Reference WAC 392-172A. Federal audit requirements. Confidential information must be protected. |
| 6.4.2   | SPECIAL EDUCATION STUDENT HISTORY FILE<br>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.                 | Destroy when obsolete or superseded.       | SD51-05I-02                               |   |

**SUPERSEDED**



| 6.4. SPECIAL EDUCATION STUDENT RECORDS |  |            |  |                                      |                                    |   |
|--|--|------------|--|--------------------------------------|------------------------------------|---|
| ITEM NO.                               | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
| 6.4.3                                  | <p>SPECIAL EDUCATION STUDENT HISTORY FILE DISPOSITION NOTICE RECORD<br/>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.</p> <p>REV: Changed remarks. 07/2008</p> | OPR        | 6 years – <b>See remarks.</b>                  | Destroy when obsolete or superseded. | SD51-05I-03                        | <p>Reference WAC 392-172A-05235, 34 CFR 300.624, and FERPA.</p> <p>NOTE: Notice MUST be sent to last known address of parent/legal guardian/adult student before destruction.</p> |

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 | SECONDARY (ALL OTHER) RECORD COPIES   | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS  |
|----------|--|------------|--|---|------------------------------------|--|
| 6.5.1    | APPLICATION FOR CERTIFICATE OF EDUCATIONAL COMPETENCE.   | OFM        | Superintendent of Public Instruction: 3 months | Testing Center:<br>Until award of certificate.<br><br>School Districts:<br>Destroy when obsolete or superseded. | SD51-05F-01                        | 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<br><br>REV: Changed primary retention. 07/2008  | OPR        | 3 years  | Destroy when obsolete or superseded.  | SD51-05F-02                        | Reference the Family Educational Rights and Privacy Act (FERPA) 99.32.   |
| 6.5.3    | CONFIDENTIAL REPORTS (A.K.A. GUIDANCE REPORTS, or SUPPLEMENTARY REPORTS)<br>Includes subjective reports and anecdotal information from district, outside agencies and individuals. | OFM        | 2 years after student graduates or withdraws   | Destroy when obsolete or superseded.  | SD51-05F-03                        | These records should be separated from the cumulative folder with access limited as per the Family Educational Rights and Privacy Act (FERPA). |

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              | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|--|------------|---|--|------------------------------------|---|
| 6.5.4    | GED PERMANENT TRANSCRIPT (GED TEST SCORES)<br>Record of all applicants who were issued certificates.   | OPR        | Retained by Superintendent of Public Instruction: PERMANENT | Testing Center: 100 years.<br><br>School Districts: Destroy when obsolete or superseded. | SD51-05F-04                        | The State Board of Community and Technical Colleges administers GED testing. Reference WAC 180-96 and WAC 131-48.                         |
| 6.5.5    | GRADUATE LIST<br>Annual list of graduates.<br><br><i>Use DAN GS51-05F-10 for OFFICIAL STUDENT RECORDS AND TRANSCRIPTS</i><br><br>New Series: 07/2008 | OFM        | PERMANENT – Potential Archival Value.                       | Destroy when obsolete or superseded.   | SD51-20-10                         | Contact your Regional Archivist. Records from this series may be selected for transfer to and preservation at a Regional Archives branch. |

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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|---|------------|--|--------------------------------------|------------------------------------|---|
| 6.5.6    | <p>OFFICIAL STUDENT RECORD<br/>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.)</p> <p>All other records pertaining to each student belong in the cumulative folder, or are covered by other series.</p> <p>REV: Changed title, description, and remarks. 07/2008</p> | OPR        | 100 years.                                     | Destroy when obsolete or superseded. | SD51-05F-10                        | <p>Reference WAC 392-415-060 and 392-415-070.</p> <p>SUGGESTED PRESERVATION PROCEDURE – MICROFILM<br/>This records series may be retained on microfilm instead of hard copy. Microfilming must be done according to standards issued by State Archives.</p> |

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   | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS  |
|----------|---|------------|--|--------------------------------------|------------------------------------|--|
| 6.5.7    | REQUEST FOR APPROVAL TO TEST FOR CERTIFICATE OF EDUCATIONAL COMPETENCE (GED)<br>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.   | Destroy when obsolete or superseded. | SD51-05F-05                        | 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> | Destroy when obsolete or superseded. | SD51-05F-11                        | *If there is no official student record that supersedes the school registers, these must be retained 100 years.<br><br>Contact your Regional Archivist. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. |

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 | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|---|------------|--|--------------------------------------|------------------------------------|---|
| 6.5.9    | <p>STUDENT CUMULATIVE FOLDER (A.K.A. STUDENT FILE FOLDER)<br/>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.  | Destroy when obsolete or superseded. | SD51-05F-07                        | <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> |

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                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|--|------------|--|--------------------------------------|------------------------------------|---------|
| 6.5.10   | STUDENT DISCIPLINARY ACTION REPORT   | OFM        | Retain 3 years in school.  | Destroy when obsolete or superseded. | SD51-01-50                         |         |
| 6.5.11   | STUDENT DISCIPLINE FILES<br>Includes student expulsion records.                      | OPR        | 3 years after the incident.  | Destroy when obsolete or superseded. | SD51-05F-08                        |         |
| 6.5.12   | STUDENT LOCATOR CARDS/CLASS SCHEDULES<br><br>REV: Changed primary retention. 07/2008 | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-05F-09                        |         |

**SUPERSEDED**



| <b>6.6. TEACHING RECORDS</b> |  |                   |   |  |   |                 |
|------------------------------|--|-------------------|---|--|---|-----------------|
| <b>ITEM NO.</b>              | <b>SERIES TITLE AND DESCRIPTION</b>  | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b> | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b>  |
| 6.6.1                        | GRADE DOCUMENTATION –<br>ELEMENTARY<br>To provide documentation for grades.  | OFM               | 1 year.   | Destroy when obsolete or superseded.       | SD51-06E-01                               |                 |
| 6.6.2                        | GRADE DOCUMENTATION –<br>SECONDARY<br>To provide documentation for grade and credit record challenges. Includes records that document state graduation requirements, such as Culminating Project.<br><br>REV: Changed description and added remarks. 07/2008 | OFM               | 5 years.  | Destroy when obsolete or superseded.       | SD51-06E-02                               | WAC 180-51-061. |
| 6.6.3                        | LESSON PLANS   | OFM               | 1 year.   | Destroy when obsolete or superseded.       | SD51-06E-03                               |                 |
| 6.6.4                        | STATEMENT OF REQUIREMENTS AND EXPECTATIONS, SIGNED AND RETURNED BY PARENT/GUARDIAN   | OFM               | Retain for current school year.                       | Destroy when obsolete or superseded.       | SD51-06E-04                               |                 |

**SUPERSEDED**



| 6.7. TRAFFIC SAFETY |   |            |  |                                      |                                    |         |
|---------------------|---|------------|--|--------------------------------------|------------------------------------|---------|
| ITEM NO.            | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY   | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 6.7.1               | STUDENT ATTENDANCE LISTS /RECORD CARD<br>REV: Changed title. 07/2008                                  | OPR        | 6 years.   | Destroy when obsolete or superseded. | SD51-06D-04                        |         |
| 6.7.2               | STUDENT TRAFFIC SAFETY CERTIFICATES   | OFM        | 2 years after student graduates or withdraws.  | Destroy when obsolete or superseded. | SD51-06D-05                        |         |
| 6.7.3               | TRAFFIC SAFETY PARENT/LEGAL GUARDIAN PERMISSION STATEMENTS<br>REV: Changed primary retention. 07/2008 | OFM        | Until Traffic Safety Certificate has been awarded to student, or student has withdrawn from program. | Destroy when obsolete or superseded. | SD51-06D-06                        |         |

**SUPERSEDED**



## 7. STUDENT MANAGEMENT AND SERVICES

| 7.1. ATHLETICS |   |            |   |                                      |                                    |   |
|----------------|---|------------|---|--------------------------------------|------------------------------------|---|
| ITEM NO.       | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY            | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
| 7.1.1          | ATHLETE/TEAM ACHIEVEMENT RECORDS – NON-WIAA   | OPR        | PERMANENT – 1 copy potential archival value. See remarks. | Destroy when obsolete or superseded. | SD51-03-03                         | 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.          | Destroy when obsolete or superseded. | SD51-20-02                         | 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<br>Self-evaluation survey on activities students would like to participate in and limitations of students, as required by Title IX.   | OFM        | 5 years.  | Destroy when obsolete or superseded. | SD51-03-15                         | Reference 34 CFR 106.41.  |
| 7.1.4          | ATHLETIC ELIGIBILITY RECORDS<br>Includes physicals, insurance, grade point, appeals, emergency information, student registration, and parent/legal guardian consent forms.<br><br>REV: Changed description. 07/2008 | OFM        | 3 years. See remarks.                                     | Destroy when obsolete or superseded. | SD51-03-04                         | Primary copy of insurance on individuals should be kept with District insurance files.  |



| <b>7.1. ATHLETICS</b> |  |                   |   |  |   |                |
|-----------------------|--|-------------------|---|--|---|----------------|
| <b>ITEM NO.</b>       | <b>SERIES TITLE AND DESCRIPTION</b>  | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b> | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b> |
| 7.1.5                 | LEAGUE REGISTRATION FORMS – ATHLETICS<br>REV: Changed Title. 07/2008   | OFM               | 3 years.  | Destroy when obsolete or superseded.       | SD51-03-10                                |                |
| 7.1.6                 | SCHEDULES – ATHLETICS<br>Dates and locations of school games, meets, and matches for season and tournament play. | OFM               | 3 years.  | Destroy when obsolete or superseded.       | SD51-03-11                                |                |
| 7.1.7                 | SCHOOL PROTESTS OF GAMES   | OFM               | 1 year.   | Destroy when obsolete or superseded.       | SD51-03-12                                |                |
| 7.1.8                 | SCOREBOOK, SCORESHEETS   | OFM               | 1 year.   | Destroy when obsolete or superseded.       | SD51-03-13                                |                |
| 7.1.9                 | TEAM ROSTERS   | OFM               | 3 years.  | Destroy when obsolete or superseded.       | SD51-03-14                                |                |

SUPERSEDED



| <b>7.2. ATTENDANCE</b> |  |                   |   |  |   |                |
|------------------------|--|-------------------|---|--|---|----------------|
| <b>ITEM NO.</b>        | <b>SERIES TITLE AND DESCRIPTION</b>  | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b> | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b> |
| 7.2.1                  | <p>ABSENCE CASE FILE</p> <p>Documents districts' dealings with individual students having attendance problems. May include but is not limited to the following:</p> <ul style="list-style-type: none"> <li>• Absence Reports;</li> <li>• Absence Report Profiles;</li> <li>• Absence/Attendance Discipline Letters (sent to parent/legal guardian);</li> <li>• Petitions to Compel School Attendance;</li> <li>• Compulsory School Attendance Filing Forms;</li> <li>• Intervention Plan;</li> <li>• Truancy Conference Counseling Forms.</li> </ul> | OPR               | 6 years.  | Destroy when obsolete or superseded.       | SD51-04-10                                |                |
| 7.2.2                  | ABSENCE EXCUSE   | OFM               | Retain for current school year.                       | Destroy when obsolete or superseded.       | SD51-04-01                                |                |
| 7.2.3                  | ABSENCE NOTIFICATION   | OFM               | Retain for current school year.                       | Destroy when obsolete or superseded.       | SD51-04-02                                |                |

SUPERSEDED





| <b>7.2. ATTENDANCE</b> |  |                   |  |  |   |                |
|------------------------|--|-------------------|--|--|---|----------------|
| <b>ITEM NO.</b>        | <b>SERIES TITLE AND DESCRIPTION</b>  | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b>              | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b> |
| 7.2.4                  | ABSENCE NOTIFICATION REPORT<br>Written notification to parent/legal guardian regarding a student's absences.   | OFM               | Retain for current school year.                                    | Destroy when obsolete or superseded.       | SD51-04-03                                |                |
| 7.2.5                  | ABSENCE REPORTS<br>Reports tracking absences in the total student population (including electronic input). May include but is not limited to the following:<br>1. Students with Excused Absences – by period.<br>2. Students with Unexcused Absences – by period.<br>3. Students with Excused Absences – daily.<br>4. Students with Unexcused Absences – daily.<br><br>REV: Changed primary retention. 07/2008 | OFM               | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded.       | SD51-04-11                                |                |
| 7.2.6                  | ADMIT SLIPS<br>Approved permission to return to class.<br><br>REV: Added description. 05/2008  | OFM               | Retain for current school year.                                    | Destroy when obsolete or superseded.       | SD51-04-12                                |                |

SUPERSEDED



| <b>7.2. ATTENDANCE</b> |  |            |  |                                      |                                    |         |
|------------------------|--|------------|--|--------------------------------------|------------------------------------|---------|
| ITEM NO.               | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 7.2.7                  | ATTENDANCE RECORD, INDIVIDUAL STUDENT<br>Supports Enrollment Report. Includes Alternative Learning Experience.<br><br>REV: Changed description and primary retention. 07/2008  | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-04-04                         |         |
| 7.2.8                  | BUS/PICK-UP CHANGES – TEMPORARY AUTHORIZATION<br><br>REV: Changed title. 07/2008   | OFM        | Retain for current school year.                                    | Destroy when obsolete or superseded. | SD51-04-13                         |         |
| 7.2.9                  | CLASSROOM ATTENDANCE SOURCE DOCUMENTATION<br>Attendance reports used as source documentation for enrollment. May include attendance cards, bubble sheets, grade books, etc.<br><br>REV: Changed primary retention. 07/2008 | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-04-05                         |         |

**SUPERSEDED**



| 7.2. ATTENDANCE |   |            |   |                                      |                                    |                          |
|-----------------|---|------------|---|--------------------------------------|------------------------------------|--------------------------|
| ITEM NO.        | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY                    | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS                  |
| 7.2.10          | COMPULSORY SCHOOL ATTENDANCE TRUANCY PETITION/DISPOSITION LOGS<br>Summary listing which tracks the filing and disposition of Truancy Petitions to Compel School Attendance.<br><br>REV: Changed title and description. 07/2008                            | OFM        | Last entry in log plus 6 years.                                   | Destroy when obsolete or superseded. | SD51-04-07                         |                          |
| 7.2.11          | DAILY PERIOD ATTENDANCE INPUT<br>Includes electronic and paper input.   | OFM        | Retain for current school year.                                   | Destroy when obsolete or superseded. | SD51-04-08                         |                          |
| 7.2.12          | LATE ARRIVAL AND EARLY DEPARTURE LOGS   | OFM        | Retain for current school year.                                   | Destroy when obsolete or superseded. | SD51-04-14                         |                          |
| 7.2.13          | STATISTICAL REPORTS ON SCHOOL ABSENCES REQUIRED BY THE SUPERINTENDENT OF PUBLIC INSTRUCTION – BUILDING LEVEL<br>Retained by Superintendent of Public Instruction.<br><br>REV: Changed title and primary retention; added description and remarks. 07/2008 | OPR        | 3 years or until completion of State Auditor's examination report | Destroy when obsolete or superseded. | SD51-04-06                         | WAC 392-121 and 392-117. |

SUPERSEDED



| <b>7.2. ATTENDANCE</b> |   |                   |  |  |   |                |
|------------------------|---|-------------------|--|--|---|----------------|
| <b>ITEM NO.</b>        | <b>SERIES TITLE AND DESCRIPTION</b>   | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b>              | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b> |
| 7.2.14                 | STATISTICAL REPORTS ON SCHOOL ABSENCES REQUIRED BY THE SUPERINTENDENT OF PUBLIC INSTRUCTION – DISTRICT-LEVEL<br>Retained by Superintendent of Public Instruction.<br><br>REV: Changed title and primary retention; added description. 07/2008 | OPR               | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded.       | SD51-04-09                                |                |

**SUPERSEDED**



| <b>7.3. FOOD SERVICES</b><br><i>Reference RCW 28A.235 and WAC 392-157.</i> |  |            |  |                                      |                                    |   |
|--|--|------------|--|--------------------------------------|------------------------------------|---|
| ITEM NO.   | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
| 7.3.1  | CATERING REQUESTS<br>Requests for use of kitchen and the supplying of food and labor.<br><br>REV: Changed primary retention. 8/2008  | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-08-01                         |   |
| 7.3.2  | FOOD HANDLER'S PERMIT  | OFM        | Destroy when obsolete or superseded.                               | Destroy when obsolete or superseded. | SD51-08-02                         |   |
| 7.3.3  | FOOD SERVICE ORDERS<br>For supplies needed to operate school lunch program.<br><br>REV: Changed primary retention. 8/2008            | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-08-03                         |   |
| 7.3.4  | FREE OR REDUCED-PRICE MEAL APPLICATION<br>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.     | Destroy when obsolete or superseded. | SD51-08-04                         | Federal audit requirements. Security of confidential information must be protected.<br><br>Reference USDA National School Lunch Program and School Breakfast Program, Provisions 1, 2, & 3 - Fact Sheet, and 7 CFR 210. |



| <b>7.3. FOOD SERVICES</b><br><i>Reference RCW 28A.235 and WAC 392-157.</i> |  |            |  |                                      |                                    |                            |
|--|--|------------|--|--------------------------------------|------------------------------------|----------------------------|
| ITEM NO.   | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS                    |
| 7.3.5  | FREE OR REDUCED-PRICE MEAL APPLICATION VERIFICATIONS   | OFM        | Federal fiscal year plus 3 years.                                  | Destroy when obsolete or superseded. | SD51-08-15                         |                            |
| 7.3.6  | HACCP PLAN (HAZARD ANALYSIS OF CRITICAL CONTROL POINTS PLAN)<br>Plans and reports of standard operating procedures.<br>New series. 07/2008 | OPR        | 6 years.   | Destroy when obsolete or superseded. | SD51-20-04                         | Reference WAC 246-215-181. |
| 7.3.7  | HEALTH INSPECTIONS<br>Inspection of facility to ensure it meets federal and state standards.   | OFM        | Primary copy held by local health district/department.             | Destroy when obsolete or superseded. | SD51-08-14                         |                            |
| 7.3.8  | MEAL AND MILK COUNT REPORTS AND DOCUMENTATION<br>Record of daily meals and milk served.<br>REV: Changed primary retention. 5/2008          | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-08-05                         | Reference 7 CFR 210.       |
| 7.3.9  | MEAL PRODUCTION RECORDS<br>Records of amount of food prepared and served to meet meal patterns.  | OFM        | Federal fiscal year plus 3 years.                                  | Destroy when obsolete or superseded. | SD51-08-13                         |                            |

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                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|---|------------|--|--------------------------------------|------------------------------------|---------|
| 7.3.10   | MEAL TICKET/CREDIT LOG<br>Listing of meal tickets/credits issued, including number, date, name of purchaser, and/or recipient and amount paid.<br><br>REV: Changed primary retention. 07/2008 | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-08-06                         |         |
| 7.3.11   | MEAL TICKETS<br>Prepaid meal tickets.<br><br>REV: Changed primary retention. 07/2008  | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-08-07                         |         |
| 7.3.12   | MENUS   | OFM        | Destroy when obsolete or superseded.                               | Destroy when obsolete or superseded. | SD51-08-16                         |         |
| 7.3.13   | MONTHLY MEAL COUNT REIMBURSEMENT REPORT<br>Includes monthly meal count and edit checks as supporting documentation.   | OPR        | 6 years.   | Destroy when obsolete or superseded. | SD51-08-08                         |         |
| 7.3.14   | SCHOOL BREAKFAST PROGRAM PLAN<br>Includes plan and backup documentation submitted to OSPI for program approval.   | OPR        | Termination of plan plus 6 years.                                  | Destroy when obsolete or superseded. | SD51-08-09                         |         |



| <b>7.3. FOOD SERVICES</b><br><i>Reference RCW 28A.235 and WAC 392-157.</i> |   |            |  |                                      |                                    |         |
|--|---|------------|--|--------------------------------------|------------------------------------|---------|
| ITEM NO.   | SERIES TITLE AND DESCRIPTION  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY                     | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
| 7.3.15   | SITE HEALTH PERMIT  | OFM        | Destroy when obsolete or superseded.                               | Destroy when obsolete or superseded. | SD51-08-10                         |         |
| 7.3.16   | STOCK CONTROL RECORDS<br>Listing of food items, supplies, and commodities used for manual count of inventory on hand. May be used to complete the F-196 report.<br>REV: Changed primary retention. 07/2008                                    | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-08-11                         |         |
| 7.3.17   | STOCK INVENTORY REPORT SUMMARY<br>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.<br>REV: Changed primary retention. 07/2008 | OFM        | 3 years or until completion of State Auditor's examination report. | Destroy when obsolete or superseded. | SD51-08-12                         |         |

**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                        | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS |
|----------|--|------------|---|--------------------------------------|------------------------------------|---------|
| 7.4.1    | APPLICATION FOR HOME/HOSPITAL TUTORING   | OPR        | 6 years.  | Destroy when obsolete or superseded. | SD51-09-01                         |         |
| 7.4.2    | CERTIFICATE OF IMMUNIZATION STATUS (CIS)<br>Dept. of Health Form No. 348-013.  | OFM        | Destroy after termination of enrollment.                              | Destroy when obsolete or superseded. | SD51-09-02                         |         |
| 7.4.3    | CHILD ABUSE REPORTS<br>Reports compiled by district personnel regarding students who may be victims of abuse. Submitted to DSHS Child Protective Services. | OPR        | 6 years.  | Destroy when obsolete or superseded. | SD51-09-03                         |         |
| 7.4.4    | COMMUNICABLE DISEASE REPORT<br>Includes data collected from schools and summary report.  | OFM        | Destroy after summary report is submitted to local Health Department. | Destroy when obsolete or superseded. | SD51-09-04                         |         |
| 7.4.5    | HEALTH ROOM/NURSE ENCOUNTER DATA (NED)<br>Vital statistics, assessment, care and intervention.<br><br>New series. 07/2008                                  | OPR        | 8 years after last interaction.                                       | Destroy when obsolete or superseded. | SD51-20-05                         |         |



#### 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                      | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS                 |
|----------|--|------------|---|--------------------------------------|------------------------------------|-------------------------|
| 7.4.6    | HEALTH ROOM REGISTRY<br>Log of students reporting to health office because of illness/injury.  | OFM        | 8 years after last entry –<br><b>See remarks.</b>                   | Destroy when obsolete or superseded. | SD51-09-05                         | Reference RCW 4.16.350. |
| 7.4.7    | HEALTH SCREENING RESULTS<br>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. | Destroy when obsolete or superseded. | SD51-09-06                         |                         |
| 7.4.8    | INDIVIDUAL HEALTH PLAN (IHP)<br>For students with life-threatening health conditions.<br><br>New series. 07/2008                                 | OPR        | 8 years after last interaction.                                     | Destroy when obsolete or superseded. | SD51-20-06                         |                         |
| 7.4.9    | MEDICATION ADMINISTRATION DAILY LOG<br>A chronological listing of the dosages administered.  | OPR        | 8 years after last dose administered – <b>See remarks.</b>          | Destroy when obsolete or superseded. | SD51-09-08                         | Reference RCW 4.16.350. |



**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                | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS                 |
|----------|--|------------|---|--------------------------------------|------------------------------------|-------------------------|
| 7.4.10   | MEDICATION/HEALTH PROCEDURES ADMINISTRATION CASE FILES<br>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. | Destroy when obsolete or superseded. | SD51-09-07                         | Reference RCW 4.16.350. |
| 7.4.11   | STUDENT HEALTH CARD OR FOLDER<br>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.<br><br>REV: Changed description. 07/2008 | OFM        | 2 years after graduation or withdrawal.                       | Destroy when obsolete or superseded. | SD51-09-09                         | Reference RCW 4.16.350. |

**SUPERSEDED**



| <b>7.5. STUDENT ASSIGNMENT</b> |  |                   |   |  |   |   |
|--------------------------------|--|-------------------|---|--|---|---|
| <b>ITEM NO.</b>                | <b>SERIES TITLE AND DESCRIPTION</b>  | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b>   | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b>                                      |
| 7.5.1                          | BOUNDARY EXCEPTION APPEALS – NON-RESIDENT STUDENT<br>Appeals filed by students residing outside the district.<br><br>REV: Changed title and added description. 07/2008 | OPR               | Office of the Superintendent of Public Instruction (OSPI) – Legal Services retains until case closed plus 10 years. | Destroy when obsolete or superseded.       | SD51-05J-01                               | Reference RCW 28A.225.225 and 230, and WAC 392-137. |
| 7.5.2                          | BOUNDARY EXCEPTION APPEALS – RESIDENT STUDENT<br>Appeals filed by students residing within the district.<br><br>REV: Changed title and added description. 07/2008      | OPR               | Resolution plus 3 years.  | Destroy when obsolete or superseded.       | SD51-05J-07                               | Reference RCW 28A.225.225 and 230, and WAC 392-137. |
| 7.5.3                          | BOUNDARY EXCEPTIONS<br>Records documenting inter-district and intra-district boundary exceptions.<br><br>REV: Changed title and added description. 07/2008             | OPR               | Current school year plus 6 years.   | Destroy when obsolete or superseded.       | SD51-05J-02                               |   |
| 7.5.4                          | PARENT/LEGAL GUARDIAN ASSIGNMENT REQUEST FORMS<br>Generates student’s assignment to a school.  | OPR               | 3 years.  | Destroy when obsolete or superseded.       | SD51-05J-03                               |   |

SUPERSEDED



| <b>7.5. STUDENT ASSIGNMENT</b> |   |                   |   |  |   |   |
|--------------------------------|---|-------------------|---|--|---|---|
| <b>ITEM NO.</b>                | <b>SERIES TITLE AND DESCRIPTION</b>   | <b>OPR or OFM</b> | <b>PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY</b>                         | <b>SECONDARY (ALL OTHER) RECORD COPIES</b> | <b>DISPOSITION AUTHORITY NUMBER (DAN)</b> | <b>REMARKS</b>  |
| 7.5.5                          | REGISTRATION – STUDENT ASSIGNMENT   | OPR               | Enrollment plus 2 years.  | Destroy when obsolete or superseded.       | SD51-05J-04                               |   |
| 7.5.6                          | SCHOOL ASSIGNMENT PROCEDURES<br>Records documenting school assignment procedures where not incorporated in School Board Minutes and/or Resolutions.<br><br><i>See DAN GS50-05A-13 for SCHOOL BOARD MINUTES.</i><br><br>REV: Changed title and primary retention; added description and remarks. 07/2008 | OPR               | 6 years after superseded<br>Potential archival value<br>– <b>See remarks.</b> | Destroy when obsolete or superseded.       | SD51-05J-05                               | Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. |
| 7.5.7                          | STUDENT ASSIGNMENT CASE FILES<br>Includes all documentation related to the assignment of a specific student to a school.  | OPR               | 3 years.  | 1 year.                                    | SD51-05J-06                               | If a student does not enroll, secondary copy may be destroyed.  |



| <b>7.6. STUDENT TRANSPORTATION</b><br><i>Reference RCW 28A.160</i> |  |            |  |                                      |                                    |                            |
|--|--|------------|--|--------------------------------------|------------------------------------|----------------------------|
| ITEM NO.   | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS                    |
| 7.6.1  | APPLICATION FOR SPECIAL TRANSPORTATION – ACCEPTED<br>For students with medical problems, or physical disabilities to receive district transportation services. | OFM        | Retain until completion of audit.              | Destroy when obsolete or superseded. | SD51-05G-02                        | Reference WAC 392-141-148. |
| 7.6.2  | APPLICATION FOR SPECIAL TRANSPORTATION – DENIED  | OFM        | Application denied plus 1 year.                | Destroy when obsolete or superseded. | SD51-05G-14                        |                            |
| 7.6.3  | IMPROPER CONDUCT ON THE BUS NOTICE<br>May show bus route, time of incident, nature of incident, and student(s) name(s).  | OFM        | 1 year.  | Destroy when obsolete or superseded. | SD51-05G-13                        |                            |



## 8. SUPERINTENDENT

| ITEM NO. | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY             | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|--|------------|--|--------------------------------------|------------------------------------|---|
| 8.1.1    | ACCREDITATION CERTIFICATES   | OPR        | PERMANENT.   | Destroy when obsolete or superseded. | SD51-05-01                         |   |
| 8.1.2    | ANNUAL HIGH SCHOOL REPORT FOR STANDARDS AND ACCREDITATION  | OPR        | PERMANENT – 1 copy potential archival value – See remarks. | Destroy when obsolete or superseded. | SD51-05-10                         | 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<br>Official legal description and drawings of school district boundaries, including director district boundaries. | OPR        | PERMANENT – 1 copy potential archival value – See remarks. | Destroy when obsolete or superseded. | SD51-05-02                         | 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**



| ITEM NO. | SERIES TITLE AND DESCRIPTION   | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY             | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS  |
|----------|--|------------|--|--------------------------------------|------------------------------------|--|
| 8.1.4    | CERTIFICATION OF ELECTION OF SCHOOL BOARD PRESIDENT  | OPR        | PERMANENT – 1 copy potential archival value – See remarks. | Destroy when obsolete or superseded. | SD51-05-03                         | 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.<br>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. |
| 8.1.5    | CERTIFICATION OF SCHOOL DISTRICT ELECTIONS<br><br>Including bonds, levies, and director elections. | OPR        | PERMANENT.   | Destroy when obsolete or superseded. | SD51-05-04                         |  |
| 8.1.6    | OFFICIAL DISTRICT NEGOTIATED SCHOOL CALENDARS  | OPR        | PERMANENT.   | Destroy when obsolete or superseded. | SD51-05-06                         |  |

**SUPERSEDED**





| ITEM NO. | SERIES TITLE AND DESCRIPTION                  | OPR or OFM | PRIMARY (SOURCE DOCUMENT/ORIGINAL) RECORD COPY                    | SECONDARY (ALL OTHER) RECORD COPIES  | DISPOSITION AUTHORITY NUMBER (DAN) | REMARKS   |
|----------|---|------------|---|--------------------------------------|------------------------------------|---|
| 8.1.7    | REPORT OF EVALUATION OF ACCREDITATION         | OPR        | PERMANENT – 1 copy potential archival value – <b>See remarks.</b> | Destroy when obsolete or superseded. | SD51-05-11                         | Contact your Regional Archivist before destroying original record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. |
| 8.1.8    | SCHOOL SERVICE BOUNDARY DECISION WORKING FILE | OFM        | Approval of Board Resolution plus 3 years.                        | Until approval of board resolution.  | SD51-05-08                         |   |
| 8.1.9    | STATEMENTS OF GRADUATION REQUIREMENTS         | OPR        | PERMANENT – 1 copy potential archival value – <b>See remarks.</b> | Destroy when obsolete or superseded. | SD51-05-13                         | 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. |



## GLOSSARY

|  |  |
|--|--|
| <b>Archival</b>  | <i>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.</i>              |
| <b>Essential</b>   | <i>Public records that local government agencies must have to maintain or resume business continuity following a disaster. The retention requirements for these records may range from very short-term to archival, but are necessary for an agency to resume its core functions following a disaster.</i>   |
|  | <i>Security backups of these public records must be created and deposited with Washington State Archives in accordance with RCW 40.10.</i>   |
| <b>OFM</b>   | <i>Public records which have been designated as “Office Files and Memoranda” for the purposes of RCW 40.14.010.</i>  |
| <b>OPR</b>   | <i>Public records which have been designated as “Official Public Records” for the purposes of RCW 40.14.010.</i>   |
| <b>Permanent</b>   | <i>These records must not be destroyed. Permanent records which are not designated as archival or potentially archival must remain in the agency’s legal custody.</i>  |
| <b>Potential Archival Value and Potentially Archival</b> | <i>Public records whose enduring legal and/or historic value must be appraised by Washington State Archives on an individual basis. Public records will be reviewed for sampling/selective retention by archivists from Washington State Archives. Records not selected for retention by Washington State Archives may be disposed of after appraisal.</i> |
| <b>Record Series</b>                                     | <i>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.</i>   |



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