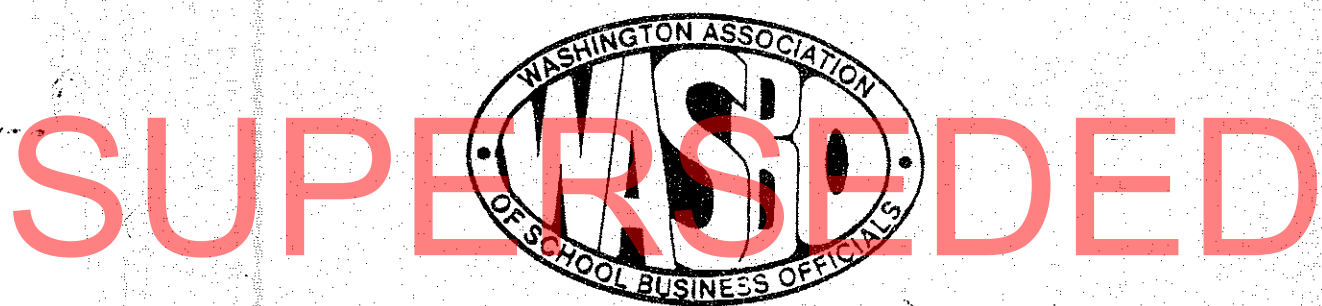


- Julie's Copy -

Washington School Districts



records management manual
and general records retention schedule

Office of the **SECRETARY of STATE**

Division of Archives and Records Management

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RECORDS MANAGEMENT MANUAL

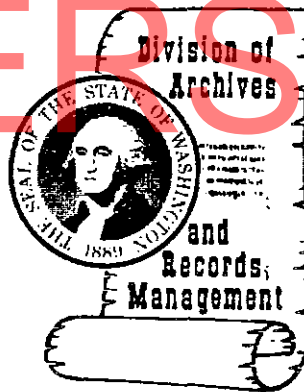
FOR

SCHOOL DISTRICTS

OFFICE OF THE SECRETARY OF STATE
Ralph Munro
Secretary of State

DIVISION OF ARCHIVES AND RECORDS MANAGEMENT
Sidney F. McAlpin
State Archivist

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Office of the Secretary of State

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State of Washington
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Legislative Building
Olympia, Washington
Revised September 1986

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INTRODUCTION

The School District Records Management Manual has been an ongoing project of the Washington Association of School Business Officials Records Management Committee since 1975. The manual, first issued in 1976, has been supplemented and amended several times. This is the first completely updated and revised edition of that manual.

The manual is concerned primarily with the process of records retention and disposal. It includes a general records retention and disposal schedule authorizing the disposal of the types of records listed after the specified retention. The Committee has added an index to facilitate use, has brought the retention of official public records into compliance with current statutes, has clarified definitions and terms, and generally improved its usefulness. Records management techniques, services and resources are also identified. For records management services and assistance, see Appendix A.

One copy of this basic manual has been provided free by the Office of the Secretary of State, Division of Archives, to each school district in the State. Additional copies of the basic manual and other related sections are available at \$3.00 each. An order form can be found in Appendix B. To facilitate improved records management, districts are encouraged to duplicate all portions of the manual.

ACKNOWLEDGMENTS

There have been numerous contributors to the development of this revised and updated Records Management Manual for Washington School Districts. Those listed below form the core which has so diligently served on the WASBO Records Management Committee. They deserve special recognition and thanks for their consistent efforts during the research, design and editing of this publication.

Frances Arthurs - ESD 121
Margaret Buxton - Renton School District #403
Sue Hamilton - Evergreen School District #114
Jann Hopkins - Tahoma School District #409
Doug McCroskey - Evergreen School District #114
Mary Palmer - Clover Park School District #400
Ron Petola - Highline School District #401
Judy Ramme - Tacoma School District #10
Mike Saunders - State Archives
Ed Strozyk (Chairperson) - Superintendent of Public Instruction
Eleanor Toews - Seattle School District #1
Shirley Vogel - Lake Washington School District #414

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B. GENERAL RECORDS RETENTION SCHEDULE

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THE GENERAL RECORDS RETENTION SCHEDULE CONSTITUTES AUTHORITY FOR ANY SCHOOL DISTRICT IN THE STATE OF WASHINGTON TO DISPOSE OF THE VARIOUS TYPES OF RECORDS LISTED THEREON ACCORDING TO THEIR ASSIGNED RETENTION PERIODS AND ARCHIVAL DESIGNATIONS. REFERENCE: RCW 40.14.070 AND WAC 414-24-050.

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
ACCOUNTING, GENERAL		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>GENERAL LEDGER</u>	OPR	6 years	Until superseded			
2	<u>JOURNALS</u>	OPR	6 years	Until superseded			
3	<u>RECEIPTS</u>	OPR	6 Years	1 year			
4	<u>BANKING RECORDS</u> a. Canceled checks b. Check registers c. Deposit slips d. Bank statements	OPR	6 Years	1 year			
5	<u>COUNTY TREASURER FINANCIAL REPORTS</u>	OPR	County Treasurer (6 years)	Until completion of State Auditor's examination report			
6	<u>EXPENDITURE TRANSACTION REPORTS</u> Adjustments to coding of expenditures and correcting errors.	OPR	6 years	1 year			
7	<u>STATE AUDITOR'S REPORT</u>	OFM	State Auditor (Permanent)	5 years			
8	<u>TRIAL BALANCES</u>	OFM	Until completion of State Auditor's examination report	None			
9	<u>INVOICE, DISTRICT</u> Invoice and back-up documentation.	OPR	6 years	1 year			
10	<u>CASH RECEIPTS TRANSMITTALS-COUNTY</u> Forms transmitting money between district and county.	OPR	6 years	Until completion of State Auditor's examination report			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie Bolchaer</i>		<i>Wm. Paul</i>			<i>S. Gray McAllister</i>		

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
ACCOUNTING, GENERAL		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
11	<u>CASH RECEIPTS TRANSMITTALS-INTERNAL</u> Forms transmitting monies from school to central accounting.	OFM	Until completion of State Auditor's examination report	1 year			
12	<u>INVENTORY OF FIXED ASSETS LISTING</u> Year end report.	OFM	Until completion of State Auditor's examination report	Until superseded			In response to GAP report
13	<u>FIXED ASSETS INVENTORY CHANGE FORMS</u> Forms to update fixed assets inventory.	OFM	Until completion of State Auditor's examination report	Until completion of update			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Win Good</i>			<i>L. Dreyfus Medlin</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-060

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
ACCOUNTS PAYABLE		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>VOUCHERS</u> Used as claims and supporting invoices, batched.	OPR	6 years	Until completion of State Auditor's examination report			
2	<u>WARRANT REGISTER</u>	OPR	6 years	Copies generated for informational purposes can be disposed of at agency option.			
3	<u>CANCELLED WARRANTS</u>	OPR	6 years	None			
4	<u>PURCHASE ORDERS AND/OR PURCHASE REQUISITIONS</u> Used as pay documents.	OPR	6 years	Until completion of State Auditor's examination report			
5	<u>APPLICATION FOR DUPLICATE INSTRUMENT, AFFIDAVIT AND BOND</u> Authority to issue duplicate check or warrant in case of loss. Notarized oath that original warrant was lost and requesting a replacement.	OPR	6 years	None			
6	<u>ACCOUNTS PAYABLE CONTROL</u> Lists invoice totals and taxes. Used to balance against computer generated warrant register.	OFM	1 month	None			

SUPERSEDED

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FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Walter F. ...

FOR THE STATE ARCHIVIST

L. ...



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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PAGE 1 OF 3 PAGES

SCHEDULE TITLE		SCHEDULE APPLICABLE TO					EFFECTIVE DATE
ADMINISTRATIVE FILES/ALL FUNCTIONAL UNITS		SCHOOL DISTRICTS					Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		ARCHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>SCHOOL BOARD MINUTES, RESOLUTIONS, AGENDA & NOTICES</u>	OFM	(Clerk of the School Board) See Central Administration/Superintendent's Office #1, 2 & 3	1 year			
2	<u>POLICY & PROCEDURE DIRECTIVES</u>	OFM	See Central Administration/Superintendent's Office #4	Until superseded			
3	<u>LEGAL OPINIONS</u>	OFM	See Central Administration/Superintendent's Office #6	Until superseded			
4	<u>ADMINISTRATIVE SUBJECT OR WORKING FILES</u>	OFM	2 years + completion of State Auditor's examination report	None			
5	<u>SPI BULLETINS/MEMORANDA</u>	OFM	Until superseded or expired	Until superseded or expired			
6	<u>DAY OR READING FILE</u>	OFM	90 days	None			
7	<u>CONTRACTS AND AGREEMENTS</u>	OFM	See Central Administration/Superintendent's Office #8	Termination +1 year			
8	<u>SCHOOL CALENDARS</u>	OFM	See Central Administration/Superintendent's Office #9	Until superseded			
9	<u>ENROLLMENT REPORTS</u>	OPR	6 years	1 year			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Edwin Rush</i>			<i>Sidney J. McAlpin</i>		

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
ADMINISTRATIVE FILES/ALL FUNCTIONAL UNITS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
10	<u>RESEARCH REPORTS, SURVEYS & STUDIES</u>	OFM	3 years	1 year			
11	<u>ANNUAL REPORTS</u>	OFM	See Central Administration/Superintendent's Office #16	1 year			
12	<u>BUDGET</u>	OFM	See Central Administration/Superintendent's Office #18	1 year			
13	<u>FINANCIAL REPORTS</u> Monthly, quarterly and annual reports made to and/or by the department regarding its expenditures and the status of its budget.	OFM	Until completion of State Auditor's examination report	1 year			
14	<u>FISCAL, PURCHASE & RECEIVING DOCUMENTS</u> Documentation of purchase and procurement of goods and services including: Invoice Vouchers Purchase Orders, Field Orders & Requisitions Receipts	OFM	Accounting, General Accounting, General #9 Purchasing/Warehouse #3 Accounting, General #3	1 year			
15	<u>WORK ORDERS*</u>	OFM	Until completion of State Auditor's examination report*	1 year			*If attached to Invoice, 6 years
16	<u>PAYROLL REPORTS</u>	OFM	Payroll/Personnel #11b, 12, 13, 18, & 19	1 year*			*Individual time sheets not sent to Payroll/Personnel must be retained until completion of State Auditor's examination report
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaefer</i>		<i>Winn Rush</i>			<i>Kidney F. McAlpin</i>		

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
ADMINISTRATIVE FILES/ALL FUNCTIONAL UNITS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
17	<u>EMPLOYEE PERSONNEL FILES</u>	OFM	Payroll/Personnel #1	Termination + 1 year			
18	<u>JOB DESCRIPTIONS</u>	OFM	Payroll/Personnel #9	Until superseded			
19	<u>DISCIPLINARY ACTION REPORT</u>	OFM	3 years	1 year			
20	<u>AFFIRMATIVE ACTION COMPLIANCE REPORTS</u>	OFM	3 years	1 year			
21	<u>DESCRIPTIVE GUIDE</u>	OFM	Central Administration/ Superintendent's Office #20	Until superseded			
22	<u>FIRE & OTHER EMERGENCY DRILLS</u>	OFM	3 years	1 year			
23	<u>MINUTES, ASSOCIATED STUDENT BODY AND STUDENT ORGANIZATIONS</u>	OPR	Permanent	1 year			
24	<u>BYLAWS, ASSOCIATED STUDENT BODY AND STUDENT ORGANIZATIONS</u>	OPR	Permanent	1 year			
25	<u>STATE REPORTS FOR THE OFFICE OF SUPERINTENDENT OF PUBLIC INSTRUCTION (SPI)</u>	OFM	Superintendent of Public Instruction	Until completion of State Auditor's examination report			
26	<u>SURPLUS PROPERTY</u>	OPR	6 years	1 year			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR				FOR THE STATE ARCHIVIST	
<i>Marjorie R. Schaer</i>		<i>Ellen Bush</i>				<i>Anthony J. McAlpin</i>	

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
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SCHEDULE TITLE		SCHEDULE APPLICABLE TO			EFFECTIVE DATE		
ATHLETICS		SCHOOL DISTRICTS			Jan. 1, 1986		
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	CPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>SCHEDULES</u> Dates and locations of school games, meets and matches, for season and tournament play.	OFM	3 years	None			
2	<u>ATHLETIC ELIGIBILITY RECORDS</u> a. Physicals b. Insurance c. Grade Point d. Appeals	OFM	3 years*	None			*Primary copy of Insurance on Individuals should be kept with District Insurance files
3	<u>SCHOOL PROTESTS OF GAMES</u>	OFM	1 year	None			
4	<u>TEAM ROSTERS</u>	OFM	1 year	None			
5	<u>ATHLETE/TEAM ACHIEVEMENT RECORDS</u> Statistics, league standings.	OPR	Permanent	1 year or until superseded			
6	<u>CONSTITUTION AND BYLAWS, LEAGUE</u>	OPR	League Permanent	Until superseded			
7	<u>POLICY AND PROCEDURES, LEAGUE</u> Hand books, bulletins, rules, practical arrangements, home team responsibilities	OPR	League Permanent	Until superseded			
8	<u>MINUTES, LEAGUE</u>	OPR	League Permanent	1 year			
9	<u>COACHES MANUAL, LEAGUE</u>	OFM	Until superseded	None			
10	<u>COACHES FIRST AID CERTIFICATE</u> (Renewed every three years)	OFM	Until superseded	None			

SUPERSEDED

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FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Wm. Paul

FOR THE STATE ARCHIVIST

L. Guy F. McAlpin



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-060

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
ATHLETICS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
11	<u>SCOREBOOK, SCORESHEETS</u>	OFM	1 year	None			
12	<u>REGISTRATION FORMS</u>	OFM	Until completion of State Auditor's examination report	None			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>William R. Qual</i>			<i>Li. Inez F. Medlin</i>		

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
ATTENDANCE		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OFR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>ATTENDANCE CARD</u>	OFM	3 years	None			Record of absence may also be kept in teacher's grade book
2	<u>ABSENT NOTICE REPORT</u>	OFM	Current school year	Current school year			
3	<u>DAILY ATTENDANCE REPORT</u>	OFM	Until completion of State Auditor's examination report	1 year			
4	<u>DAILY PERIOD ABSENCE REPORT</u>	OFM	Current school year	Current school year			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie R. Schaer</i>		<i>W. H. Bush</i>			<i>Sidney J. McAlpin</i>		

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-060

DISPOSITION AUTHORITY NUMBER
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SCHEDULE TITLE: BUDGET
SCHEDULE APPLICABLE TO: SCHOOL DISTRICTS
EFFECTIVE DATE: Jan. 1, 1986

ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AP-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>BUDGET</u>	OPR	Permanent	1 year			
2	<u>BUDGET WORK PAPERS AND PRELIMINARY DRAFTS</u>	OFM	Until completion of State Auditor's examination report	None			
3	<u>BUDGET OFFICER'S MONTHLY BOARD REPORT</u>	OPR	6 years	1 year			
4	<u>BUDGET STATUS REPORT-DEPARTMENT/BUILDING</u>	OFM	Until completion of State Auditor's examination report	Until superseded			

SUPERSEDED

B-10

FOR THE ATTORNEY GENERAL: *Marjorie R. Schaefer*
FOR THE STATE AUDITOR: *Win Rush*
FOR THE STATE ARCHIVIST: *L. D. McAlpin*



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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PAGE **1** OF **2** PAGES

SCHEDULE TITLE: **CENTRAL ADMINISTRATION/SUPERINTENDENT'S OFFICE**

SCHEDULE APPLICABLE TO: **SCHOOL DISTRICTS**

EFFECTIVE DATE: **Jan. 1, 1986**

ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1.	<u>SCHOOL BOARD MINUTES & RESOLUTIONS</u>	OPR	Permanent	1 year			
2.	<u>SCHOOL BOARD AGENDA</u>	OFM	Until completion of State Auditor's examination report	1 year			
3.	<u>SCHOOL BOARD MEETING NOTICES</u>	OPR	6 years	1 year			
4.	<u>SCHOOL BOARD CORRESPONDENCE</u>	OFM	2 years	None			
5.	<u>POLICY & PROCEDURE DIRECTIVES</u>	OFM	Until superseded + completion of State Auditor's examination report	Until superseded			
6.	<u>LEGAL OPINIONS</u>	OPR	Permanent	Until superseded			
7.	<u>COURT OR LITIGATION CASE FILES</u>	OPR	6 years after settlement of case	Until settlement of case			
8.	<u>CONTRACTS & AGREEMENTS</u>	OPR	Termination + 6 years	Termination + 1 year			
9.	<u>SCHOOL CALENDARS</u>	OPR	Permanent	Until superseded			
10.	<u>ACCREDITATION CERTIFICATES</u>	OPR	Permanent	District option			
11.	<u>INSURANCE POLICIES</u>	OPR	Expiration + 6 years	None			
12.	<u>WARRANTIES</u>	OPR	Expiration + 6 years	None			
13.	<u>PRESS RELEASES</u>	OFM	3 years	1 year			

SUPERSEDED

B-11

FOR THE ATTORNEY GENERAL: *Marjorie B. Schaer*

FOR THE STATE AUDITOR: *Wm. Lusk*

FOR THE STATE ARCHIVIST: *Henry McAlpin*



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
CENTRAL ADMINISTRATION/SUPERINTENDENT'S OFFICE		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
14	<u>PHOTOGRAPHS, NEGATIVES & BIOGRAPHICAL SKETCHES</u>	OFM	Screen annually	None			
15	<u>PUBLICATIONS MASTER FILE</u>	OFM	Screen annually	See Non-Record Materials #9			
16	<u>ANNUAL REPORTS</u>	OPR	Permanent	1 year			
17	<u>BOUNDARY RECORDS</u>	OPR	Permanent	Until superseded			
18	<u>BUDGET</u>	OPR	(Clerk of the Board) Permanent	1 year			
19	<u>DESCRIPTIVE GUIDE</u>	OPR	Permanent	Until superseded			
20	<u>CERTIFICATION OF ELECTION OF SCHOOL BOARD CHAIRMAN & PRESIDENTS</u>	OPR	Permanent	1 year			
21	<u>CERTIFICATION OF ELECTION OF SCHOOL SCHOOL DISTRICT DIRECTOR</u>	OPR	Permanent	1 year			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR				FOR THE STATE ARCHIVIST	
<i>Marjorie R. Schaer</i>		<i>Winn R. ...</i>				<i>Sidney J. McAllen</i>	

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SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
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REFERENCE: RCW 40.14.070 & WAC 414-24-050

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PAGE 1 OF 2 PAGES

SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
COMPUTER SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
DISPOSITION/REMARKS						
1	<u>COMPUTER SERVICES FEASIBILITY STUDIES</u> May include problem identification, requirements statement, system objectives, alternative proposals, cost/benefit analysis or feasibility statement.	OFM	3 years after termination of system or program use.	1 year		
2	<u>SYSTEM DESIGN DOCUMENTATION</u> May include description of design, including system review, if applicable and system definition, project work plan, design detail, including documentation plan, program specifications, special forms and requirements, development plans for testing conversion and acceptance.	OFM	3 years after termination of system or program use.	1 year after termination		
3	<u>PROGRAM AND IMPLEMENTATION DATA</u> Operational and user instructions, specifications and system acceptance criteria.	OFM	3 years after termination of system or program use.	1 year after termination		
4	<u>SYSTEM MAINTENANCE DOCUMENTATION</u> May include program change authorization, description changes, acceptance testing.	OFM	3 years after termination of system or program use.	1 year after termination		
5	<u>OPERATIONAL DATA</u> Summaries of throughput statistics, usage figures and work output measurements.	OFM	1 year	None		

SUPERSEDED

B-13

FOR THE ATTORNEY GENERAL
Marjorie B. Schaer

FOR THE STATE AUDITOR
Win Quah

FOR THE STATE ARCHIVIST
Libby F. Medina



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER
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SCHEDULE TITLE: COMPUTER SERVICES

SCHEDULE APPLICABLE TO: SCHOOL DISTRICTS

EFFECTIVE DATE: Jan. 1, 1986

ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
6	<u>POST IMPLEMENTATION REVIEWS</u> Project and personnel evaluations, further recommendations.	OFM	Until termination of system or program use.	1 year			
7	<u>SYSTEM AND SOFTWARE BACKUP DATA</u> Tapes, disks and punch cards providing backup data which is revised and recreated in a regular cycle.	OFM	Until superseded	None			
8	<u>SURPLUS COPIES AND FAULTY OUTPUT</u> Extra copies of reports, faulty reports, and other output which must be redone.	OFM	Optional*	None			*Faulty output regarding negotiable records such as warrants must be audited before being disposed of.

SUPERSEDED

B-14

FOR THE ATTORNEY GENERAL: *Marjorie B. Schaer*

FOR THE STATE AUDITOR: *John Qual*

FOR THE STATE ARCHIVIST: *L. Guy McElpoin*



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE: CURRICULUM AND INSTRUCTION

SCHEDULE APPLICABLE TO: SCHOOL DISTRICTS

EFFECTIVE DATE: Jan. 1, 1986

ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>INSTRUCTIONAL MATERIALS SUBJECT FILES</u> Evaluation data on instructional materials which are accrued prior to Board adoption.	OFM	Until superseded by new adoption.	None			
2	<u>COMMUNITY CHALLENGES OF INSTRUCTIONAL MATERIALS</u>	OFM	5 years	None			
3	<u>COURSE ADDITIONS, DELETIONS AND CHANGES</u>	OFM	3 years	None			
4	<u>CURRICULUM SUMMARIES AND GUIDES</u>	OFM	Permanent	Until superseded			
5	<u>STUDENT LEARNING OBJECTIVES PROGRAM FILES</u> a. Complete set of Student Learning Objectives for each basic subject. b. Community input data for development of Student Learning Objectives. c. Evaluation data for each Student Learning Objective.	OFM	Until superseded	None			Potentially archival
6	<u>CATEGORICAL PROGRAM FILES</u> a. State categorical programs: student lists, test scores, inventory of equipment, legal reports, evaluations and assurances to be maintained for monitoring and auditing purposes. b. Federal categorical programs: student eligibility lists, pre-and post-test data, comparability reports, evaluations, inventory of equipment, parent advisory committee minutes.	OFM	3 years after completion of State Auditor's examination report covering grant expenditures + until resolution of other audits or litigations initiated before the end of the end of the three year period + satisfaction of retention requirements specifically stated in grant instructions or grant agreement	None			Reference: Handbook for Categorical State and Federal Programs published by SPI

SUPERSEDED

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FOR THE ATTORNEY GENERAL: *Marjorie B. Schaer*

FOR THE STATE AUDITOR: *Winn Quast*

FOR THE STATE ARCHIVIST: *Sidney J. McAlpin*



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
CURRICULUM AND INSTRUCTION		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
DISPOSITION/REMARKS						
7	<u>STUDENT TESTING-PRIMARY RECORD</u> Response sheet completed by student.	OFM	90 days	None		
8	<u>STUDENT TESTING - GROUP REPORTS</u> Summary of testing scores by class, grade, program, sex, ethnic group, building or district.	OFM	5 years	None		
9	<u>STUDENT TESTING-INDIVIDUAL STUDENT REPORT</u>	OFM	2 years after graduation	None		
10	<u>STUDENT TESTING-AUTOMATED BACKUP DATA</u> Tapes, disks or punch cards containing data from various student testing exercises.	OFM	5 years	None		
11	<u>STUDENT TESTING - AUTOMATED PROGRAM SOFTWARE AND SYSTEM DOCUMENTATION</u>	OFM	1 year after superseded by new system.	None		
12	<u>ACCREDITATION AND EVALUATION REPORTS</u>	OPR	Until superseded plus 6 years	Until superseded		*Potentially archival
13	<u>GRADUATION REQUIREMENTS STATEMENTS</u>	OPR	Permanent	Until superseded		
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR		FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Wim Rud</i>		<i>S. Dreyfus Medlin</i>		

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SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
EMPLOYEE RELATIONS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>COLLECTIVE BARGAINING AGREEMENT</u>	OPR	6 years after termination	Termination plus 1 year			
2	<u>NEGOTIATIONS WORKING FILE</u>	OFM	Until approval of negotiated agreement	None			
3	<u>GRIEVANCES</u>	OPR	Settlement plus 6 years	1 year			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie R. Schaefer</i>		<i>Edwin Rusk</i>			<i>Sidney J. Mellin</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
FACILITIES PLANNING & CONSTRUCTION ADMINISTRATION		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
1	<u>LONG RANGE FACILITIES PLAN</u>	OPR	Permanent	Until superseded*		*One copy--potentially archival
2	<u>CAPITAL IMPROVEMENT PLANNING PROJECT FILE</u>	OFM	Until completion of project	Until completion of project		
3	<u>CAPITAL LEVY PLANNING FILES</u>	OFM	Until completion of project	Until completion of project		
4	<u>BUILDING AND SITE DATA</u>	OFM	Until disposal and/or sale of building and site	None*		*Selected files potentially archival
5	<u>DEMOGRAPHIC AND ENROLLMENT PROJECTIONS</u>	OFM	5 years	Until superseded*		*Potentially archival
6	<u>ENVIRONMENTAL IMPACT STATEMENTS</u> Includes final statements and backup documentation relating to construction and school closures.	OFM	Permanent	Until completion of planning project		
7	<u>ENVIRONMENTAL IMPACT STATEMENT WORK FILES</u>	OFM	End of planning period	End of planning period		
8	<u>SCHOOL BOARD RESOLUTION REGARDING BOND ISSUE</u>	OPR	(School Board) Permanent	Until completion of project		
9	<u>SPI BUILDING CONSTRUCTION MATCHING FUND</u>	OPR	6 years	Until completion of project		
10	<u>PUBLIC BIDS</u> a. Request for bid b. Public notice c. Bid award	OPR	(School Board Resolution) Permanent	6 years		
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR		FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Winn Rush</i>		<i>Silvius J. Medford</i>		

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SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE FACILITIES PLANNING & CONSTRUCTION ADMINISTRATION	SCHEDULE APPLICABLE TO SCHOOL DISTRICTS	EFFECTIVE DATE Jan. 1, 1986
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ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
11	<u>BUILDING SPECIFICATIONS, DRAWINGS, ADENDA, NOTES & CHANGE ORDERS</u>	OFM	Until disposal and/or sale of building and site	Until disposal and/or sale of building and site			
12	<u>MAJOR CONSTRUCTION PROJECT FILES</u> Construction of new buildings, major renovation and additions.	OPR	Until termination of ownership plus 6 years	Until obsolete or superseded			
13	<u>MINOR CONSTRUCTION PROJECT FILES</u> Roofing, paving, minor renovation and repairs.	OPR	Completion of project plus 6 years	Until completion of project			
14	<u>ARCHITECT/CONSULTANT CONTRACT FILES</u>	OPR	6 years after termination of contract	Until termination of contract			
15	<u>CONSTRUCTION LOG</u>	OFM	Permanent	None			
16	<u>SMALL WORKS ARCHITECT/CONSULTANT ROSTER FOR CONTRACTS</u>	OFM	Until superseded	Until superseded			

SUPERSEDED

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FOR THE ATTORNEY GENERAL <i>Marjorie B. Schaer</i>	FOR THE STATE AUDITOR <i>Winn Good</i>	FOR THE STATE ARCHIVIST <i>L. Gray F. Medlin</i>
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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
FEDERAL GRANTS AND PROGRAMS		SCHOOL DISTRICTS				Jan.1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>GRANT APPLICATIONS</u> Includes narrative explanation of the nature and purpose of the proposed project, amount of funds requested, matching funds, in-kind contributions and plan of work.						
	a. Successful Applications	OPR	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits or litigation initiated before the end of the 3 year period + satisfaction of retention requirements specifically stated in the grant instructions or grant agreement.	Until completion of grant project	Yes		*Reference Federal Register: OMB A102 (see Appendix)
	b. Unsuccessful Applications	OFM	1 year	1 year	Yes*		*Selected files potentially archival
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR		FOR THE STATE ARCHIVIST			
<i>Marjorie B. Schaer</i>		<i>Wm. Rush</i>		<i>S. Dwyer Medina</i>			

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
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REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
FEDERAL GRANTS AND PROGRAMS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
2	<u>GRANT AGREEMENT</u> Official statement of the terms and conditions of the grant agreed upon and signed by the grantor and the grantee	OPR	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits or litigation initiated before the end of the 3 year period + satisfaction of retention requirements specifically stated in the grant instructions or grant agreement.	Until completion of grant project	Yes		*Reference Federal Register: OMB A102 (see Appendix)
3	<u>PROJECT REPORTS</u> Statement on progress, problems and success in the completion of the grant project, including periodic, annual, special and final reports.	OFM	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits or litigation initiated before the end of the 3 year period + satisfaction of retention requirements specifically stated in the grant instructions or grant agreement.	1 year	Yes		*Reference Federal Register: OMB A102 (see Appendix) +Selected files potentially archival
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Winn Ruck</i>			<i>Lily F. Medlin</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
FEDERAL GRANTS AND PROGRAMS		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
DISPOSITION/REMARKS						
4	<u>WARRANTS/CHECKS</u> Cancelled and returned warrants or checks from transactions involving grant funds.	OPR	6 years or until satisfaction of grant audit requirements, whichever is longer	None	No	
5	<u>VOUCHERS</u> Official statement authorizing payment for goods and services from transactions involving grant funds.	OPR	6 years or until satisfaction of grant audit requirements, whichever is longer.	3 yrs after final expenditure report or annual Financial Status Report	No	
6	<u>WARRANT, CHECK OR VOUCHER REGISTERS</u> Numerical listings of checks, warrants and vouchers from transactions involving grant funds.	OPR	6 years or until satisfaction of grant audit requirements, whichever is longer.	3 yrs. after final expenditure report or annual Financial Status Report	No	
7	<u>ANNUAL FINANCIAL STATUS REPORT</u> Annual report submitted for continuing grants containing summaries and breakdowns of expenditures for the past year.	OFM	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits of litigation initiated before the end of the 3 year period + satisfaction of retention requirements specifically stated in the grant instructions or grant agreement.	1 year	Yes	*Reference Federal Register: OMB A102 (see Appendix)

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SUPERSEDED

FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Wm. R. ...

FOR THE STATE ARCHIVIST

... Medley



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
FEDERAL GRANTS AND PROGRAMS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
8	<u>FINAL EXPENDITURE REPORT</u> End of a project report accounting for the expenditure of grant funds (submitted for non-continuing grants).	OFM	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits or litigation initiated before the end of the 3 year period + satisfaction of retention requirements specifically stated in grant instructions or agreement.	1 year	Yes		*Reference Federal Register: OMB A102 (see Appendix)
9	<u>FINANCIAL SUPPORT DOCUMENTS</u> (Continuing Grants) Working papers, such as summaries, spread sheets and other data reflecting the expenditure of grant funds.	OFM	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits or litigation initiated before the end of 3 year period + satisfaction of retention requirements specifically stated in grant instructions or agreement.	1 year	Yes		*Reference Federal Register: OMB A102 (see Appendix)
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaefer</i>		<i>Winn Quack</i>			<i>Sidney F. Mellipin</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
FEDERAL GRANTS AND PROGRAMS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
10	<u>FINANCIAL SUPPORT DOCUMENTS</u> (Non-Continuing Grants) Working papers, such as summaries, spread sheets and other data reflecting the expenditure of grant funds.	OFM	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits or litigation initiated before the end of the 3 year period + satisfaction of retention requirements specifically stated in grant instructions or agreement.	1 year	No		*Reference Federal Register: OMB A102 (see Appendix)
11	<u>STATISTICS</u>	OFM	3 yrs. after completion of State Auditor's examination report covering grant expenditures* + resolution of other audits or litigation initiated before the end of the 3 year period + satisfaction of retention requirements specifically stated in grant instructions or agreement.	1 year	Yes+		*Reference Federal Register: OMB A102 (see Appendix) +Selected files potentially archival
12.	<u>SURVEY OF PARENTS OR GUARDIANS LIVING OR WORKING ON FEDERAL PROPERTY (PUBLIC LAW 874)</u>	OFM	Satisfaction of retention requirements specifically stated in grant instructions or agreement.	None			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Win Qual</i>			<i>Richard F. Medlin</i>		

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SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO					EFFECTIVE DATE
FOOD SERVICES		SCHOOL DISTRICTS					Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>CATERING REQUESTS</u> Request for use of kitchen and supplying of food and labor.	OFM	3 years after completion of State Auditor's examination report	1 year			
2	<u>FOOD SERVICE ORDERS</u> For supplies needed to operate school lunch program.	OFM	3 years after completion of State Auditor's examination report	1 year			
3	<u>DAILY LUNCH & MILK COUNT REPORT</u> Daily record of meals and milk served. Completed by kitchen and/or lunch room servers.	OFM	3 years after completion of State Auditor's examination report	1 year			
4	<u>FREE OR REDUCED PRICE LUNCH APPLICATION</u> Applications for reduced or free lunch in compliance with National School Lunch Act.	OFM	3 years	None			
5	<u>MEAL TICKETS</u> Prepaid lunch tickets.	OFM	3 years after completion of State Auditor's examination report	1 year			Only 3 months if meal ticket log is kept.
6	<u>MEAL TICKET LOG</u> Listing of meal tickets issued, including number, date, name of purchaser and/or recipient and amount paid.	OFM	3 years after completion of State Auditor's examination report	1 year			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Winn R. ...</i>			<i>... ..</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
FOOD SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
7	<u>STOCK CONTROL RECORDS</u> Listing of food items, supplies and commodities used for manual count of inventory on hand.	OFM	3 years after completion of State Auditor's examination report	Until superseded			
8	<u>STOCK INVENTORY REPORT SUMMARY</u> Prepared from stock control records and food service orders. Lists quantities on hand, received, used, and unit prices.	OFM	3 years after completion of State Auditor's examination report	1 year			
9	<u>FOOD HANDLER'S PERMIT</u> Permit renewed every two years.	OFM	Until superseded	None			
10	<u>SITE HEALTH PERMIT</u> Annual renewal for kitchen.	OFM	Until superseded	None			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Winn Lusk</i>			<i>L. Dreyfus Mellick</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
HEALTH SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>MEDICATION ADMINISTRATION CASE FILES</u> Includes physician/parent authorization and account of number and dosages administered.	OFM	Age 18 + 3 years	District option			Reference RCW 4.16.350 Limitations of actions for health care or related services
2	<u>CERTIFICATE OF IMMUNIZATION</u> (DSHS 13-263)	OFM	Until termination of enrollment	District option			Original should be sent to new school in event of out of district transfer and recommend the secondary copy be retained as part of student cumulative folder.
3	<u>HEALTH ROOM REGISTRY</u> Log of students reporting to health office because of illness/injury.	OFM	1 year	1 year			
4	<u>COMMUNICABLE DISEASE REPORT</u> Includes data collected from schools and summary report.	OFM	Until summary submitted to local health dept.	End of school year			
5	<u>HEALTH SCREENING REPORTS</u> Includes following tests: a. Scoliosis (mandatory test) b. Vision (mandatory test) c. Hearing (mandatory test) d. Dental (optional test)	OFM	Until data transferred to Pupil Health Card or folder.	1 year			

SUPERSEDED

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FOR THE ATTORNEY GENERAL
Marjorie B. Schaer

FOR THE STATE AUDITOR
Wm. Paul

FOR THE STATE ARCHIVIST
Anthony J. McAlpin



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
HEALTH SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
6	<u>PUPIL HEALTH CARD OR FOLDER</u> Screening results, nurse's notes, data recorded from information submitted by parents/doctors, record of notification to parents, health assessments.	OFM	Until transferred to student cumulative record or folder.	None			
7	<u>CHILD ABUSE REPORTS</u> Reports compiled by district personnel regarding pupils who may be victims of abuse. Submitted to DSHS Child Protective Services.	OFM	(Child Protection Services) 6 years	(District) 1 year			

SUPERSEDED

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FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Winn Quod

FOR THE STATE ARCHIVIST

L. Dwyer F. Medina



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
INDIVIDUAL SCHOOL ARCHIVAL MATERIALS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
<p>THE FOLLOWING TYPES OF MATERIALS ARE DESIGNATED AS ARCHIVAL AND SHOULD BE PRESERVED FOR HISTORICAL VALUE BY SCHOOL DISTRICTS OR TRANSFERRED TO NEAREST STATE ARCHIVE BRANCH</p>							
1	<u>SCHOOL HISTORY MATERIAL</u> Including dedication bulletins, evaluations, letter awards, photographs, scrapbooks, and other historical materials.						
2	<u>GRADUATING CLASS HISTORY FILE</u> Containing such material as: graduation list, commencement and baccalaureate services programs, final grade point, cumulative class rank, diploma order list, awards list/honor roll, senior activities and other class items for class reunions or historical purposes.						
3	<u>YEAR BOOK</u>						
4	<u>COURSE DESCRIPTION CATALOG</u>						
5	<u>STUDENT HANDBOOK</u>						
6	<u>SCHOOL BULLETINS AND NEWSPAPERS</u>						
7	<u>ANNUAL HIGH SCHOOL REPORT FOR STANDARDS AND ACCREDITATION</u>						
8	<u>REPORT OF EVALUATION OF ACCREDITATION</u>						
9	<u>STATEMENTS OF GRADUATION REQUIREMENTS</u>						
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie R Schaer</i>		<i>Winn Lamb</i>			<i>Lidney McAlpin</i>		

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SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
LEARNING RESOURCE CENTERS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>RESOURCE CENTER SHELF LIST/INVENTORIES AND TEXTBOOK SHEFLIST</u>	OFM	Until superseded plus completion of State Auditor's examination report	None			
2	<u>BOOK LOSS REPORT</u>	OPR	6 years	Until superseded			

SUPERSEDED

FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Wm. Rusk

FOR THE STATE ARCHIVIST

Shirley McAlpin

B-30



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
MAIL SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		ARCHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
DISPOSITION/REMARKS						
1	<u>RECEIPTS FOR GOODS AND SERVICES</u>	OPR	6 years	Until completion of State Auditor's examination report		
2	<u>POSTAGE METER LICENSE</u>	OPR	6 years	Until superseded		
3	<u>POSTAGE METER LOG</u>	OFM	Until completion of State Auditor's examination report	None		
4	<u>CERTIFIED MAIL RETURN RECEIPT</u>	OFM	3 years	None		
5	<u>CERTIFIED AND REGISTERED MAIL LOG</u> For incoming and outgoing mail.	OFM	3 years	None		
6	<u>BULK MAILING PERMIT</u>	OPR	6 years	None		
7	<u>SENDER'S STATEMENT AND CERTIFICATION OF BULK MAILING</u>	OFM	3 years	None		
8	<u>POSTAGE EXPENDITURE REPORT</u>	OFM	Until completion of State Auditor's examination report	1 year		
9	<u>U.P.S. REGISTER</u>	OPR	6 years	None		

SUPERSEDED

B-31

FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

W. L. Rush

FOR THE STATE ARCHIVIST

Richard J. McElroy



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
MAINTENANCE SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
DISPOSITION/REMARKS						
1	<u>ENGINEERING AND ARCHITECTURAL DRAWINGS</u> Architectural, structural, plumbing, electrical, etc.	OFM	Until disposal and/or sale of building and site	Until completion of project		Duplicates should be available and stored off-site for Essential Records protection. Microfilm is inexpensive and considered a suitable substitute.
2	<u>BUILDING SPECIFICATIONS</u>	OFM	Until disposal and/or sale of building and site	Until completion of project		Same as above
3	<u>OPERATING MANUALS</u> Prepared by contractors for use of the district in maintaining equipment installed in buildings.	OFM	Until disposal and/or sale of building and site	Until superseded		Same as above
4	<u>MAINTENANCE HISTORY FOLDER</u> File folders for each building which may have: maintenance performed, work orders, purchase orders, copies of state and/or insurance companies inspection reports.	OFM	6 years except capital improvement documents which should be kept as long as site is District property	None		
5	<u>WORK ORDER</u> Request for performance of maintenance work, may show location, date of request work to be performed, etc.	OFM	Until completion of State Auditor's examination report	1 year		
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST	
<i>Marjorie B. Schaer</i>		<i>Win Rud</i>			<i>L. Duoy F. Medlin</i>	

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER
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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
MAINTENANCE SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
6	<u>BOILER VESSEL REPORTS</u> a) Report of boiler inspection by custodian. b) Report of boiler or hot water tanks by Insurance Company or Labor & Industries.	OFM	6 months	None			
7	<u>FIRE EXTINGUISHER INSPECTION TAGS</u> Prepared by Fire Departments or private firms.	OFM	Until superseded	None			
8	<u>OPERATING PERMITS</u> Boiler, elevators.	OFM	Until superseded	None			

SUPERSEDED

B-33

FOR THE ATTORNEY GENERAL
Marjorie B. Schaer

FOR THE STATE AUDITOR
Wim Quast

FOR THE STATE ARCHIVIST
L. Guy F. McAlpin

SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-060

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE

NON-RECORD MATERIALS

SCHEDULE APPLICABLE TO

SCHOOL DISTRICTS

EFFECTIVE DATE

Jan. 1, 1986

ITEM NO.

RECORDS SERIES TITLE & DESCRIPTION

OPR OR OFM

RETENTION PERIOD

PRIMARY COPY

SECONDARY COPIES

AR-CHIVE?

MICRO-FILM?

DISPOSITION/REMARKS

THE FOLLOWING TYPES OF MATERIALS ARE DESIGNATED AS NON-RECORD AND MAY BE DISPOSED OF AS SOON AS THEY HAVE SERVED THEIR PURPOSE.

- 1 Catalogs, trade journals, and other printed or published materials received from other offices, commercial firms, or private institutions which require no action and are not needed for documentary purposes.
- 2 Electrostatic, photocopy, magnetic, or other type of copy of correspondence, completed forms, and bulletins, prepared for reference and informational distribution.
- 3 Letters of transmittal which do not add any information to the transmitted material.
- 4 Miscellaneous notices or memoranda which do not relate to the functional responsibility of the agency, e.g., notices of community affairs, employee meetings, holidays.
- 5 Preliminary drafts of letters, memoranda, reports, worksheets, and informal notes which do not represent significant basic steps in the preparation of record documents.
- 6 Reproduction masters, such as stencils, hectograph masters and offset plates.
- 7 Routing slips used to direct the distribution of documents.
- 8 Shorthand notes, stenotype tapes, computer disks, and tape recordings which have been transcribed into typewritten or printed form.
- 9 Stocks of agency publications, forms and printed documents, preserved for supply purposes, which are superseded, outdated, or otherwise valueless except for accountable forms which must be examined by the State Auditor's office before being destroyed. Procedures for disposing of accountable or negotiable forms are on the next page.
- 10 Telephone messages, "While You Were Away" slips, check slips or similar forms used to convey non-policy informational messages.

SUPERSEDED

B-34

FOR THE ATTORNEY GENERAL

Marjorie R. Schaer

FOR THE STATE AUDITOR

Wm. R. ...

FOR THE STATE ARCHIVIST

... McAlpin

**WASHINGTON STATE RECORDS COMMITTEE
AUDIT REQUEST AND DESTRUCTION CERTIFICATE
(UNUSED PRE-NUMBERED ACCOUNTABLE FORMS)
REFERENCE RCW 40.14**

PART 1. AGENCY LIST AND REQUEST		
DEPARTMENT OR AGENCY	OFFICE OF RECORD (DIVISION, ETC.)	VOLUME OF RECORDS IN CUBIC FEET, FILE DRAWERS
TITLE OF RECORDS SERIES	INCLUSIVE DATES	INCLUSIVE NUMBERS
SUPERSEDED		
It is requested that the above listed unused or voided pre-numbered forms be audited, destroyed, and certified as to destruction.		
NAME AND TITLE OF RESPONSIBLE OFFICER OF REQUESTING AGENCY		DATE
PART 2. VERIFICATION		
I certify that the unused or voided pre-numbered forms listed above have been audited and verified by series and number and are hereby approved for destruction.		
SIGNATURE OF INTERNAL AUDITOR OR RECORDS OFFICER		DATE
PART 3. DESTRUCTION CERTIFICATE		
This is to certify that the above listed and audited forms have been destroyed by shredding, burning or pulping beyond any recognizable or usable form on _____ 19 _____, in accord with the provisions of RCW 40.14.		
STATE ARCHIVIST, CERTIFYING INTERNAL AUDITOR OR RECORDS OFFICER		DATE



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER
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SCHEDULE TITLE: PAYROLL/PERSONNEL

SCHEDULE APPLICABLE TO: SCHOOL DISTRICTS

EFFECTIVE DATE: Jan. 1, 1986

ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>EMPLOYEE PERSONNEL FILES</u> Personally identifiable information gathered during an individual's term of employment.	OPR	6 years after termination of employment	1 year after termination of employment or transfer			
2	<u>EQUAL EMPLOYMENT OPPORTUNITY INQUIRY FORM (EEO)</u>	OFM	2 years	1 year			
3	<u>EMPLOYMENT REQUISITION/PERSONNEL ACTION REQUEST</u> May contain position specifications, needs analysis and authorization signatures.	OFM	2 years	1 year			
4	<u>JOB ANNOUNCEMENT OR POSTING</u>	OFM	2 years	None			
5	<u>EMPLOYMENT INTERVIEW EVALUATION FILES</u> May include lists of eligible applicants, screening check list and interview questionnaires.	OFM	2 years	None			
6	<u>EMPLOYMENT APPLICATION - NON-HIRED</u>	OFM	1 year	None			
7	<u>EMPLOYEE CONTRACTS</u> a. Final contracts, includes subsequent riders issued. b. Contracts superseded within fiscal year.	OPR	6 years	None			
		OFM	Until completion of State Auditor's examination report.	None			
8	<u>PROFESSIONAL CREDIT COMMITTEE FILE</u> Evaluation of applications for recognition of non-college credit courses.	OFM	Until termination of employment	None			

SUPERSEDED

B-35

FOR THE ATTORNEY GENERAL: *Marjorie B. Schaer*

FOR THE STATE AUDITOR: *Edwin Rusk*

FOR THE STATE ARCHIVIST: *John P. McElroy*



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER
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SCHEDULE TITLE: PAYROLL/PERSONNEL
SCHEDULE APPLICABLE TO: SCHOOL DISTRICTS
EFFECTIVE DATE: Jan. 1, 1986

ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
9	<u>JOB DESCRIPTIONS</u>	OFM	Until superseded	Until superseded			
10	<u>EMPLOYEE DIRECTORY</u>	OFM	Until superseded	Until superseded			

DISTRICT MUST BE AWARE THAT EACH DISTRICT IS RESPONSIBLE FOR PROVIDING INFORMATION FOR THE 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. CHOICE OF RECORD SERIES FOR LONG-TERM VERIFICATION OF RETIREMENT ELIGIBILITY SHOULD BE CONFIRMED WITH STATE RETIREMENT SYSTEM.

11	<u>EMPLOYEE PAYROLL STATUS</u>						
	a. For districts using Personnel Action Request Form.	OFM	Until data entered and verified	None			
	b. For districts not using Personnel Action Request Form.	OFM	Until completion of State Auditor's examination report.	Until superseded			
	c. For districts using Employee Payroll Status as a substitute for time sheets.	OFM	6 years	None			
12	<u>MONTHLY TIME CARDS/SHEETS/REPORTS</u> Includes sick leave activity	OPR	6 years*	Until completion of State Auditor's examination report			*Reference: Federal Register OMB A102 (see Appendix)
13	<u>LEAVE REPORTS</u>	OFM	Until completion of State Auditor's examination report	1 year			
14	<u>TEACHER SUBSTITUTE REPORT</u>	OFM	Until completion of State Auditor's examination report	None			

SUPERSEDED

B-36

FOR THE ATTORNEY GENERAL: *Marjorie B. Schaer*
FOR THE STATE AUDITOR: *W. Rush*
FOR THE STATE ARCHIVIST: *L. McAlpin*



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
PAYROLL/PERSONNEL		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
15	<u>PAYROLL WARRANT REGISTER</u>	OPR	6 years*	Until completion of State Auditor's examination report			*May be needed as long-term verification of retirement eligibility. See comment above item 11.
16	<u>CANCELLED WARRANTS/CHECKS</u>	OFM	6 years	None			
17	<u>MEDICAL INSURANCE LISTINGS</u>	OFM	Until superseded plus completion of State Auditor's examination report	None			
18	<u>LISTINGS OF OTHER PAYROLL DEDUCTIONS</u>	OFM	Until superseded plus completion of State Auditor's examination report	None			
19	<u>BENEFIT DETAIL REPORTS</u> Automated or Manual. Lists district/employee payments on benefits.	OFM	6 years	None			
20	<u>AUTHORIZATION FOR PAYROLL DEDUCTIONS</u> May include tax sheltered agreements, medical insurance, credit union, and other deductions.	OPR	Termination of authorization or agreement plus 6 years	None			
21	<u>GARNISHMENTS</u>	OFM	(Superior Court) Permanent	(District) Until satisfaction			
22	<u>PRELIMINARY PAYROLL REPORT</u>	OFM	Until verification of final payroll report	None			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie R Schall</i>		<i>Wm Rush</i>			<i>John F. McElroy</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
PAYROLL/PERSONNEL		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
DISPOSITION/REMARKS						
23	<u>STATE RETIREMENT SYSTEM FORMS</u>	OFM	Until completion of State Auditor's examination report*	None		
24	<u>FEDERAL WAGE AND TAX STATEMENTS</u>	OFM	4 years	None		
25	<u>AUTHORIZATION FOR DIRECT PAYROLL DEPOSIT</u>	OFM	Until transferred to cancellation file	None		
26	<u>CANCELLATION OF AUTHORIZATION FOR DIRECT PAYROLL DEPOSIT</u>	OFM	4 years	None		
27	<u>DIRECT PAYROLL DEPOSIT PRE-NOTE DATA</u>	OFM	1 year	None		
28	<u>DETAIL OF DIRECT PAYROLL DEPOSIT ENROLLEES</u>	OFM	1 year	None		
29	<u>DIRECT PAYROLL DEPOSIT TRANSMITTAL LISTINGS</u>	OFM	Until completion of State Auditor's examination report	None		
30	<u>DIRECT PAYROLL DEPOSIT HASH SHEET</u>	OFM	1 year	None		
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST	
<i>Marjorie B. Schaer</i>		<i>Winn R. ...</i>			<i>...</i>	

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
PURCHASING/WAREHOUSE		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>BIDS AND FORMAL QUOTES</u> A. Successful B. Unsuccessful Includes specifications and/or conditions	OPR OFM	6 years* Until completion of State Auditor's examination report	None None			*Unless litigation is pending.
2	<u>PRICE CHECKS AND INFORMAL QUOTES</u>	OFM	1 Year	None			
3	<u>PURCHASE ORDERS AND/OR PURCHASE REQUISITIONS</u>	OPR	6 Years (Accounts Payable)	Until completion of State Auditor's examination report			
4	<u>WITHDRAWAL/CANCELLATION/CHANGE PURCHASE ORDER</u>	OPR	6 Years	Until completion of State Auditor's examination report			
5	<u>DAMAGE AND LOSS CLAIMS</u>	OFM	Until completion of State Auditor's examination report	1 year			
6	<u>REQUISITIONS</u>	OFM	Until completion of State Auditor's examination report	1 year			
7	<u>DEBIT/CREDIT CHARGES</u>	OFM	Until completion of State Auditor's examination report	1 year			
8	<u>DELIVERY RECEIPT - INTERNAL</u>	OFM	Until completion of State Auditor's examination report	None			
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie R. Schaer</i>		<i>Wm. R. ...</i>			<i>... McAlpin</i>		

SUPERSEDED

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**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
PURCHASING/WAREHOUSE		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
9	<u>INVENTORY - WAREHOUSE</u> Year-end report	OFM	Until superseded plus completion of State Auditor's examination report	Until superseded			
10	<u>INVENTORY CHANGES/TRANSFERS-MATERIALS/EQUIPMENT*</u>	OFM	Until completion of State Auditor's examination report	Until after update			*Primary copy may be with general accounting.
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Wm. R. ...</i>			<i>... F. Mc ...</i>		

SUPERSEDED

B-40



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
SAFETY, EMPLOYEES		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
1	<u>CERTIFICATION OF EMPLOYER AS SELF-INSURER</u>	OPR	(Dept. of Labor & Industries)	Until certification withdrawn or surrendered.		
2	<u>ACCIDENT REPORTS, EMPLOYEE</u> Made out by employee, supervisor and/or doctor. Includes in-house reports and other reports which are submitted to other agencies as necessary. a. Reportable accidents	OFM	(Dept. of Labor & Industries)	10 years		
	b. Non-reportable accidents	OFM	3 years	None		
3	<u>OCCUPATIONAL INJURIES AND ILLNESSES, U.S. BUREAU OF LABOR STATISTICS LOG AND SUMMARY</u>	OFM	5 years	1 year		
4	<u>ACCIDENT CLAIM LOGS, DEPARTMENT OF LABOR AND INDUSTRIES</u>	OFM	3 years	None		
5	<u>COMPENSATION QUARTERLY REPORT</u>	OFM	(Dept. of Labor & Industries)	Until completion of State Auditor's examination report.		

SUPERSEDED

B-41

FOR THE ATTORNEY GENERAL

Marjorie B. Schaefer

FOR THE STATE AUDITOR

Wm. Lusk

FOR THE STATE ARCHIVIST

Sidney J. Medpitt



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
SAFETY, FACILITIES AND EQUIPMENT		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>SAFETY INSPECTION, STATE NOTICE & CITATION</u>	OFM	(WISHA Office)	3 years			
2	<u>NOTIFICATION OF PENALTY ASSESSMENT</u>	OFM	(WISHA Office)	3 years			
3	<u>FIRE INSPECTIONS CONDUCTED BY SCHOOL DISTRICT</u>	OFM	Termination of policy plus 6 years	1 year			
4	<u>FACILITY SAFETY HISTORY RECORDS</u> Cumulative record showing inspection citations, corrections and other information relating to continuing safety of each district facility.	OFM	Until superseded	Until superseded			
5	<u>MINUTES OF THE MEETING, SAFETY COMMITTEE</u>	OFM	3 years	1 year			
6	<u>REFERENCE & INFORMATIONAL MATERIALS RECEIVED FROM SAFETY AGENCIES</u> Bulletins, pamphlets, notices.	NR	Until superseded	Until superseded			
7.	<u>HAZARDOUS MATERIALS</u>	OFM	6 years after removal of substance	Until removal of substance			

SUPERSEDED

B-42

FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Win Ruel

FOR THE STATE ARCHIVIST

L. Guy F. Medeiros



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
SAFETY, STUDENT		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>ACCIDENT REPORT, STUDENT</u>	OPR	2 years after student graduates	3 years			
2	<u>FIRE AND OTHER EMERGENCY DRILLS</u>	OFM	3 years	1 year			
3	<u>INSURANCE LIST, STUDENT</u>	OFM	Until completion of State Auditor's examination report	Until completion of State Auditor's examination report			
4	<u>APPROVAL FOR USE OF PRIVATE VEHICLES FOR SCHOOL TRANSPORTATION</u>	OFM	1 school year	None			

SUPERSEDED

B-43

FOR THE ATTORNEY GENERAL

Marjorie R. Schaer

FOR THE STATE AUDITOR

Edwin Rusk

FOR THE STATE ARCHIVIST

William J. McElroy



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
SECURITY		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>SECURITY PATROL LOG</u>	OFM	2 years	None			
2	<u>INTRUSION ALARM REPORT</u>	OFM	1 year	None			
3	<u>VANDALISM, CRIMINAL CASE REPORTS</u>	OFM	5 years	None			
4	<u>STATEMENT FOR RESTITUTION</u> Source document backup for billing.	OPR	6 years	Until completion of State Auditor's examination report.			
5	<u>SECURITY ANNUAL REPORT</u>	OPR	Permanent (School Board Minutes)	1 year			

SUPERSEDED

FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

W. R. Rud

FOR THE STATE ARCHIVIST

L. J. Medford

B-44



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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EFFECTIVE DATE

Jan. 1, 1986

SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
STUDENT RECORDS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		'AR-CHIVE?'	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<p><u>STUDENT RECORDS DEFINED</u> All personally identifiable information directly related to a student regardless of nature or location. Student records are normally divided into the following records series.</p> <p><u>STUDENT PERMANENT RECORD</u> (Also known as GRADE TRANSCRIPT) Shows date of admission to the school system and date of graduation or extent of progress before withdrawal. Identifies student by legal name, date of birth, address and names of parents or guardians. May include one card for each elementary, middle and high school.</p>	OPR	Permanent or until microfilmed & verified	None		*	<p>SUGGESTED PROCEDURES:</p> <p>*1 Microfilm</p> <p>a This records series may be retained permanently on microfilm in lieu of hard copy.</p> <p>b Microfilming must be done in accord with standards issued by the State Archives and be approved by the State Auditor's Office as per RCW 40.20.020.</p> <p>c Counselor's reports, comments and other information subject to deletion under the provisions of the Family Education Rights and Privacy Act should not be microfilmed, but should be destroyed according to the retention periods listed for items 2 and 3 below.</p> <p>(Reference Public Laws of 1975 #20 USC-1232g, 45 CFR Part 99)</p>
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR			FOR THE STATE ARCHIVIST		
<i>Marjorie B Schaer</i>		<i>Win Gust</i>			<i>L. Doug F. Mellin</i>		

B-45

SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

SD-26

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
STUDENT RECORDS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	
			PRIMARY COPY	SECONDARY COPIES			
2	<p><u>STUDENT PERMANENT RECORD (con't.)</u></p> <p><u>STUDENT CUMULATIVE RECORD</u> (Also known as STUDENT FILE FOLDER) Contains information collected on each student in addition to the Permanent Record or Transcript.</p>	OFM	<p>2 years after date of graduation or withdrawal from high school or 2 years after withdrawal (or no show) from elementary, middle or junior high or until request by parent or student over age 18 to delete as per the Family Educational Rights and Privacy Act.</p>	None			<p>2 This records series may also be abstracted from documents in the Student Cumulative Record (Item 2).</p> <p>SUGGESTED PROCEDURE: At end of retention period destroy all items except Student Permanent Record.</p> <p>*Reference Public Laws of 1975 #20 USC-1232g, 45 CFR, Part 99.</p>
3	<p><u>CONFIDENTIAL REPORTS</u> (Also known as STANDARD REPORTS, GUIDANCE REPORTS or SUPPLEMENTARY REPORTS) Includes subjective reports and anecdotal information from outside agencies and individuals. Access is restricted to parents, guardians or the students themselves (18 or older).</p>	OFM	<p>2 years after date of graduation or withdrawal from high school or 2 years after withdrawal (or no show) from elementary, middle or junior high or until request by parent or student (18 or older) to delete as per the Family Educational Rights and Privacy Act.</p>	1 year			Reference: WAC 392-171-621

SUPERSEDED

FOR THE ATTORNEY GENERAL

Marjorie B. Schaefer

FOR THE STATE AUDITOR

Walter R. ...

FOR THE STATE ARCHIVIST

L. Douglas McElpin

B-46



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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EFFECTIVE DATE

Jan. 1, 1986

SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
STUDENT RECORDS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
4	<u>SPECIAL, HANDICAPPED & GIFTED STUDENT PROGRAM FILES</u> Used to assess student placement and progress in special programs. Includes reports and observations regarding learning and behavior problems.	OFM	2 years after graduation or withdrawal or 2 years after student turns 21	None			SUGGESTED PROCEDURE: These records should be separated from the regular Student Cumulative File as per the limited access provisions of the Family Education Rights and Privacy Act.
5	<u>AUTHORIZATION FOR RELEASE OF STUDENT RECORDS</u>	OPR	3 years	None			

SUPERSEDED

B-47

FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Winn Good

FOR THE STATE ARCHIVIST

Richard F. McAllister



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**

REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
TEACHING RECORDS		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>GRADE BOOKS</u>						
	a. Elementary	OFM	2 years	None			
	b. Secondary	OFM	5 years	None			
2	<u>LESSON PLAN BOOKS</u>	OFM	1 year	None			
3	<u>PARENTS/GUARDIANS FIELD TRIP AUTHORIZATION</u>	OFM	1 school year	None			

SUPERSEDED

FOR THE ATTORNEY GENERAL

Marjorie R. Schauer

FOR THE STATE AUDITOR

W. R. Rusk

FOR THE STATE ARCHIVIST

S. L. McKeon

B-48



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE	
TRAFFIC SAFETY		SCHOOL DISTRICTS				Jan. 1, 1986	
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?	DISPOSITION/REMARKS
			PRIMARY COPY	SECONDARY COPIES			
1	<u>APPLICATION FOR PROGRAM APPROVAL</u>	OFM	1 year after acceptance	None			
2	<u>STUDENT PARTICIPATION LISTS</u> Students completing course, completing course receiving failing grades, and students officially withdrawn or transferred	OPR	6 years	1 year			
3	<u>STUDENT TRAFFIC SAFETY CERTIFICATES</u>	OFM	Until student reaches 18 years of age	None			
4	<u>WASHINGTON STATE UNIFORM ACCIDENT REPORTS</u>	OFM	3 years	1 year			
5	<u>APPLICATION FOR TRAFFIC SAFETY EDUCATION CERTIFICATION/TEACHER'S AFFIDAVIT FOR CERTIFICATION TO BE A TRAFFIC SAFETY INSTRUCTOR</u>	OFM	Until after term as traffic safety instructor	None			
6	<u>STUDENT PERMISSION STATEMENT</u>	OFM	1 year	None			

SUPERSEDED

B-49

FOR THE ATTORNEY GENERAL

Marjorie B. Schaefer

FOR THE STATE AUDITOR

Walter R. Rusk

FOR THE STATE ARCHIVIST

Robert J. Mellin



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER
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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
TRANSPORTATION SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OPR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
1	<u>GAS, OIL AND DIESEL REPORTS FOR BUSES AND OTHER VEHICLES</u> SPI reports prepared from this data. May list vehicle number, amount of fuel pumped, odometer readings.	OFM	Until completion of State Auditor's examination report.	None		
2	<u>BUS CONDITION CHECKLIST</u> Daily evaluation of bus by drivers.	OFM	1 year	Until completion of work		
3	<u>BUS GARAGE WORK ORDERS</u> Prepared by garage or shop personnel. Shows description of work, time, parts, employee performing work.	OFM	Until completion of State Auditor's examination report	1 year		
4	<u>NOTICE OF IMPROPER CONDUCT</u> (on the bus) May show bus route, time of incident, nature of incident, student(s) name(s).	OFM	1 year	None		
5	<u>BUS TRIP AUTHORIZATION</u> May show school, nature of trip, date, destination, miles, number of pupils, supervisor, departure and times.	OFM	Until completion of State Auditor's examination report	1 year		
6	<u>BUS TRIP TICKET LOGS</u> Same data as above.	OFM	Until completion of State Auditor's examination report	None		
FOR THE ATTORNEY GENERAL		FOR THE STATE AUDITOR		FOR THE STATE ARCHIVIST		
<i>Marjorie B. Schaer</i>		<i>Winn Reed</i>		<i>Sidney F. Medlin</i>		

B-50

SUPERSEDED



**GENERAL RECORDS RETENTION SCHEDULE
& DESTRUCTION AUTHORIZATION**
REFERENCE: RCW 40.14.070 & WAC 414-24-050

DISPOSITION AUTHORITY NUMBER

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SCHEDULE TITLE		SCHEDULE APPLICABLE TO				EFFECTIVE DATE
TRANSPORTATION SERVICES		SCHOOL DISTRICTS				Jan. 1, 1986
ITEM NO.	RECORDS SERIES TITLE & DESCRIPTION	OFR OR OFM	RETENTION PERIOD		AR-CHIVE?	MICRO-FILM?
			PRIMARY COPY	SECONDARY COPIES		
7	<u>BUS SCHEDULE FOR ALL SCHOOLS</u> Shows route, stops and time for each bus. Includes state approved route map.	OFR	3 years	Until revised		
8	<u>BUS OPERATIONS DAILY LOG</u> May show bus route, time trip began and ended, number of pupils carried, drivers signature.	OFR	Until completion of State Auditor's examination report	None		
9	<u>ACCIDENT REPORTS</u> Washington State Patrol.	OFR	District-3 years Washington State Patrol - 6 years	Washington State Patrol - 6 years (District-3 years)		
10	<u>APPLICATION FOR MEDICAL TRANSPORTATION</u> For students with medical problems or physical disabilities to receive district transportation services.	OFR	Until completion of State Auditor's examination report	None		
11	<u>VEHICLE MAINTENANCE LOG</u>	DFM	Until disposition of vehicle	None		

SUPERSEDED

B-51

FOR THE ATTORNEY GENERAL

Marjorie B. Schaer

FOR THE STATE AUDITOR

Win Good

FOR THE STATE ARCHIVIST

L. Bruce McAlpin

SUPERSEDED

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