

## Summary of Changes

### ***Transit Records Retention Schedule v.2.0 (February 2025)***

#### **New Records Series Added**

- None

#### **Retention Changes**

- Seven (7) records series have changes to their retention period/cutoff:
  1. **ADA/Paratransit Eligibility** (was AMERICANS WITH DISABILITIES ACT (ADA) CUSTOMER ELIGIBILITY FILES) **(DAN TR50-31-02) p.4**  
Changed from “6 years after termination of service or participation by customer (Non-Archival)” to “6 years after participation by customer or denial of accommodations, *whichever is sooner* (Non-Archival)”
  2. **ADA/Paratransit Service** (was ACCESSIBLE BOARDINGS REPORTS) **(DAN TR50-31-01) p.6**  
Decreased from “5 years (Non-Archival)” to “3 years after end of calendar year (Non-Archival)”  
*Rationale: 3-year retention matches statute of limitations for personal injury (RCW 4.16.080).*
  3. **Daily Route Operations** (was BUS (COACH) ASSIGNMENT SHEETS) **(DAN TR50-31-03) p.6**  
Increased from “2 years (Non-Archival)” to “6 years after end of calendar year (Non-Archival)”  
*Rationale: 6-year retention matches statute of limitations for breach of contract (RCW 4.16.040).*
  4. **Dispatch Radio Transmissions** (was DISPATCH LOGS) **(DAN TR50-31-13) p.7**  
Decreased from “3 years (Non-Archival)” to “90 days after conclusion of dispatch action (Non-Archival)”  
*Rationale: Changed to align with radio dispatch series in the Law Enforcement Records Retention Schedule.*
  5. **Fare Rate Development** (was FARE INFORMATION REFERENCE AND BACKGROUND FILES) **(DAN TR50-31-15) p.5**  
Increased from “destroy when obsolete or superseded (Non-Archival)” to “6 years after fare rates superseded (Non-Archival)”  
*Rationale: Changed to align with similar “rate setting” DANs in CORE.*
  6. **Fixed Route Schedules** (was BUS ROUTE SCHEDULES/TIMETABLES) **(DAN TR50-31-07) p.7**  
Changed from “until superseded plus 3 years (Non-Archival)” to “3 years after superseded (Non-Archival)”
  7. **Rideshare/Vanpool Participation** (was RIDEMATCHING PARTICIPANT INFORMATION) **(DAN TR50-31-29) p.4**  
Increased from “destroy when obsolete or superseded (Non-Archival)” to “6 years after participation by customer or denial of accommodations, *whichever is sooner* (Non-Archival)”  
*Rationale: 6-year retention matches statute of limitations for breach of contract (RCW 4.16.040).*

## Other Minor Changes

- Seven (7) records series have changes to their title and/or description:
  1. **ADA/Paratransit Eligibility** (*was* AMERICANS WITH DISABILITIES ACT (ADA) CUSTOMER ELIGIBILITY FILES) (**DAN TR50-31-02**) p.4
  2. **ADA/Paratransit Service** (*was* ACCESSIBLE BOARDINGS REPORTS) (**DAN TR50-31-01**) p.6
  3. **Daily Route Operations** (*was* BUS (COACH) ASSIGNMENT SHEETS) (**DAN TR50-31-03**) p.6
  4. **Dispatch Radio Transmissions** (*was* DISPATCH LOGS) (**DAN TR50-31-13**) p.7
  5. **Fare Rate Development** (*was* FARE INFORMATION REFERENCE AND BACKGROUND FILES) (**DAN TR50-31-15**) p.5
  6. **Fixed Route Schedules** (*was* BUS ROUTE SCHEDULES/TIMETABLES) (**DAN TR50-31-07**) p.7
  7. **Rideshare/Vanpool Participation** (*was* RIDEMATCHING PARTICIPANT INFORMATION) (**DAN TR50-31-29**) p.4
- Minor changes have been made to the following function/activity section headings:
  1. **Customer Service** (*was* TRANSPORTATION SYSTEMS MANAGEMENT) p.4
  2. **Fare Management** (*was* FINANCIAL MANAGEMENT) p.5
  3. **Operations** (*was* TRANSPORTATION SYSTEMS MANAGEMENT) p.6
- Minor improvements were made to the formatting throughout the schedule to align with current Washington State Archives practices.

## Essential Designation Changes

- None

## Archival Designation Changes

- None

## Archival Series Being Revoked

- A total of (2) “Archival” records series are being revoked.
- One (1) “Archival” records series is being revoked as it is covered by other “Archival” and “Non-Archival” records series:
  1. **TRANSIT PLANNING REFERENCE FILES (DAN TR50-31-40)** covered by Strategic Plans – Final (Unpublished) (DAN GS2010-080), Long-Range Asset Plans (Final Version) (DAN GS51-07-15) or Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS50-06F-03)
- One (1) “Archival” records series is being revoked as it is covered by another “Non-Archival” records series:
  1. **TRIENNIAL REVIEW AUDITS (DAN TR50-31-41)** covered by External Audits/Review of Agency – Final Reports (DAN GS50-03F-02)

## Non-Archival Series Being Revoked

- A total of (32) “Non-Archival” records series are being revoked.
- Two (2) “Non-Archival” records series are being revoked as they are covered by other “Archival” and “Non-Archival” records series:
  1. **SERVICE AREA ANNEXATION PLANS (DAN TR50-31-36)** covered by Jurisdictional Boundary – Official (DAN GS50-16-09) or Jurisdictional Boundary – Development (DAN GS52-03A-05)
  2. **SERVICE PLANNING AND DEVELOPMENT FILES (DAN TR50-31-38)** covered by Strategic Plans – Final (Unpublished) (DAN GS2010-080), Long-Range Asset Plans (Final Version) (DAN GS51-07-15) or Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS50-06F-03)
- Thirty (30) “Non-Archival” records series are being revoked as they are covered by another “Non-Archival” records series:
  1. **BUS (COACH) CHANGE SHEETS (DAN TR50-31-04)** covered by Daily Route Operations (DAN TR50-31-03)
  2. **BUS (COACH) CLEANER CHECK SHEETS (DAN TR50-31-05)** covered by Inspections/Monitoring – Routine/Non-Regulated (DAN GS2012-037) or Maintenance – Minor Non-Regulated (DAN GS2012-040)
  3. **BUS SHELTER HISTORY FILES (DAN TR50-31-08)** covered by Acquisition and Disposal – Assets (Other than Real Property) (DAN GS2012-030)
  4. **BUS SHELTER LISTINGS (DAN TR50-31-09)** covered by Inventory – Capital, Expendable and Consumable Assets (DAN GS50-03A-18)
  5. **CUSTOMER COMMENT FILES (DAN TR50-31-10)** covered by Client/Customer Feedback and Complaints (DAN GS50-01-09)
  6. **DISPATCH CHANGE SHEETS (DAN TR50-31-12)** covered by Daily Route Operations (DAN TR50-31-03)
  7. **DISPATCH FILES (DAN TR50-31-11)** covered by Daily Route Operations (DAN TR50-31-03)
  8. **EMPLOYEE WORK SCHEDULES (DAN TR50-31-14)** covered by Employees – Routine Administrative Transactions (DAN GS2017-011)
  9. **LOST AND FOUND REPORTS (DAN TR50-31-17)** covered by Lost and Found Property (DAN GS2017-005)
  10. **MARKETING AND PROMOTION PROJECT FILES (DAN TR50-31-18)** covered by Advertising and Promotion (DAN GS2011-165)
  11. **MISSED TRIP LOGS (DAN TR50-31-19)** covered by ADA/Paratransit Service (DAN TR50-31-01) or Daily Route Operations (DAN TR50-31-03)
  12. **ON-TIME PERFORMANCE REPORTS (DAN TR50-31-20)** covered by Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS50-06F-03)
  13. **OPERATIONS REPORTS (DAN TR50-31-21)** covered by Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS50-06F-03)
  14. **OPERATOR ASSIGNMENT AND SHAKE-UP RECORDS (DAN TR50-31-22)** covered by Employees – Routine Administrative Transactions (DAN GS2017-011)
  15. **OPERATOR INCIDENT REPORTS (DAN TR50-31-23)** covered by Security Incidents and Data/Privacy Breaches (DAN GS2010-008) or Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS50-06F-03)
  16. **OPERATOR PRE/POST-SHIFT INSPECTION REPORTS (DAN TR50-31-24)** covered by Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS50-06F-03)
  17. **PARATRANSIT MANIFESTS (DAN TR50-31-25)** covered by ADA/Paratransit Service (DAN TR50-31-01)
  18. **PARATRANSIT SERVICE HISTORY FILES OR DATABASE MANIFESTS (DAN TR50-31-26)** covered by ADA/Paratransit Service (DAN TR50-31-01)
  19. **PROPERTY APPRAISAL MANIFESTS FILES (DAN TR50-31-27)** covered by ADA/Paratransit Eligibility (DAN TR50-31-02)

20. **RADIO DISPATCH RECORDINGS (DAN TR50-31-43)** covered by Dispatch Radio Transmissions (DAN TR50-31-13)
21. **RADIO LOGS MANIFESTS (DAN TR50-31-28)** covered by Dispatch Radio Transmissions (DAN TR50-31-13)
22. **RIDERSHIP REPORTS (DAN TR50-31-30)** covered by Reporting Internally – Routine Program/Project/Work Unit Reports/Statistics (DAN GS50-06F-03)
23. **ROAD CALL REPORTS (DAN TR50-31-31)** covered by Reporting Internally – Routine Program/Project/Work Unit reports/Statistics (DAN GS50-06F-03)
24. **ROUTE CHANGE FILES (DAN TR50-31-32)** covered by Daily Route Operations (DAN TR50-31-03)
25. **ROUTE HISTORY DOCUMENTATION (TR50-31-33)** covered by Long-Range Asset Plans (Final Version) (DAN GS51-07-15) or Publications – Master Set (GS50-06F-04)
26. **ROUTE MAINTENANCE FILES (DAN TR50-31-34)** covered by Maintenance – Major and/or Regulated (DAN GS2012-039) or Maintenance – Minor Non-Regulated (DAN GS2012-040)
27. **SALES REPORTS (DAN TR50-31-35)** covered by Financial Transactions - General (DAN GS2011-184) or Fare Rate Development (DAN TR50-31-15)
28. **SERVICE PERFORMANCE EVALUATIONS (DAN TR50-31-37)** covered by Reporting Internally – Routine Program/Project/Work Unit reports/Statistics (DAN GS50-06F-03)
29. **TAXI SCRIP RECEIPTS (DAN TR50-31-39)** covered by Financial Transactions - General (DAN GS2011-184)
30. **VANPOOL MONTHLY REPORTS (DAN TR50-31-42)** covered by Reporting Internally – Routine Program/Project/Work Unit reports/Statistics (DAN GS50-06F-03)

***Net Reduction in Records Series: 34 (from 41 series down to 7 series)***