Using Records Retention Schedules: Which Retention Schedules Apply to Financial Records?

Purpose: Provide guidance to state and local government agencies on where to find retention requirements for financial records.

General Retention Requirements

- Most financial records for state and local government agencies are covered in the Financial Management section of either the:
  - Local Government Common Records Retention Schedule (CORE) for local agencies; or
  - State Government General Records Retention Schedule (SGGRRS) for state agencies.

Exceptions and Additional Retention Requirements

- In addition to the general requirements in the schedules above, some specific exceptions and additional requirements can be found in:
  - Community and Technical Colleges Records Retention Schedule;
  - County Auditor Records Retention Schedule;
  - County Clerks and Superior Court Records Retention Schedule;
  - County Treasurer Records Retention Schedule;
  - Economic Development and Transport Records Retention Schedule;
  - Housing Authorities Records Retention Schedule;
  - Law Enforcement Records Retention Schedule;
  - Licensing, Permitting and Taxation Records Retention Schedule;
  - Public Health Records Retention Schedule;
  - Public Hospital Districts Records Retention Schedule;
  - Public Schools (K-12) Records Retention Schedule;
  - Transit Records Retention Schedule;
  - Utility Services Records Retention Schedule;
  - Weed and Pest Control Districts.

- Some state agencies may also have exceptions and/or additional requirements in their agency-specific schedule.

Additional advice regarding the management of public records is available from Washington State Archives:

www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov