Using Records Retention Schedules: Which Retention Schedules Do Area Agencies on Aging Use?

Purpose: Provide guidance to area agencies on aging regarding which records retention schedules to use.

Area agencies on aging need to use the following records retention schedules:

1. **Local Government Common Records Retention Schedule (CORE)**
   - This schedule covers records that are commonly created/received by most government agencies (including area agencies on aging), such as records relating to:
     - Board meetings
     - Contracts and agreements
     - Facilities management
     - Financial transactions and accounting
     - Grants/bonds
     - Human resources
     - Information systems/technology
     - Legal affairs
     - Media coverage
     - Payroll
     - Policies and procedures
     - Public records requests
   - Records with minimal retention value (transitory records) are also covered in the **Local Government Common Records Retention Schedule (CORE)**.

2. **Public Health Records Retention Schedule**
   - This schedule covers records relating to the functions of promoting public health, managing vital records, providing health care and treatment, conducting research, and other activities, such as:
     - Client medical records (including release)
     - Counseling
     - Screenings and referrals

3. **Social Services Records Retention Schedule**
   - This schedule covers records relating to the function of providing social services, such as:
     - Client case files (support services)

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

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