Using Records Retention Schedules: Which Retention Schedules Do Behavioral Health Organizations Use?

Purpose: Provide guidance to behavioral health organizations on which records retention schedules to use.

Behavioral Health Organizations 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 behavioral health organizations), 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 health care services, such as:
   
   - Background checks for firearms
   - Client medical records (including release)
   - Counseling
   - Screenings and referrals

3. **Social Services Records Retention Schedule**
   
   This schedule covers records relating to providing social services to adults and juveniles, 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

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