



REVISION GUIDE

SUMMARY OF CHANGES

Based on questions and requests from local government agencies:

- The **Asset Management** function has been completely updated, consolidated, and restructured.
 - ✓ 7 LGRRS records series were transferred directly into CORE (see table on page 9).
 - ✓ The Public Works section of the *Local Government General Records Retention Schedule (LGRRS) Version 5.2* has been incorporated into CORE. Most records are covered by new or existing CORE series (see *LGRRS Demolition Guide for details*).
- 34 records series were created and 89 existing records series were revised in order to provide specific disposition authority for new or existing records AND/OR to provide clear(er) definitions and guidance for end-user ease.
- 81 records series were discontinued by consolidating redundant, confusing, or obsolete series.
- Sections were reorganized to better reflect function-based activities. Three of the new activities are:
 - ✓ Elections (Elected Officials, Initiatives and Referenda)
 - ✓ Emergency Planning, Response, Recovery
 - ✓ Local Government Legislation
- At the request of the State Archivist, multiple records series have been designated “Archival”. (This can relieve the agency of the burden/responsibility of retaining these records permanently.)
- Uniform structure (tables, columns, etc.) has been applied to entire the retention schedule. Uniform **format** has been applied to all **revised** records series. (Series whose titles are NOT bold and italicized have not yet been reviewed or revised.)
- If changes were minor (defined below), they were not considered a revision, and are not listed in this revision guide.
 - ✓ Spelling corrections;
 - ✓ Providing retention/disposition cut-off language to uniform format (with no changes to time period or designation);
 - ✓ Removal of redundant or unnecessary words.



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For assistance and advice in applying this records retention schedule,
please contact Washington State Archives at:
recordsmanagement@sos.wa.gov
or contact your Regional Archivist.



NEW RECORDS SERIES

Function: Activity	Title	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Agency Mgmt: Charter, Jurisdiction and Mission	Agency Identity/ Brand	GS2012-015 p. 10	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) ESSENTIAL OPR	Covers the agency's "branding" (logos, program names, school colors/mascots, etc.). A companion series appears in the Asset Management function for the naming of assets such as roads, buildings, bridges, etc. (GS2012-032).
Agency Mgmt: Community Relations	Public Notice (Official)	GS2012-016 p. 16	Retain for 6 years after notice published or 6 years after published event completed, whichever is later, then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	All official public notices are now covered here <i>unless specifically itemized</i> in other CORE or sector schedule series (such as election notices covered in the <i>County Auditor Records Retention Schedule</i>).
Agency Mgmt: Contracts/ Agreements	Franchises Requests – Declined	GS2012-017 p. 20	Retain for 6 years after request declined then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Covers franchise request proposals either submitted to or requested by the local government agency.
Agency Mgmt: Elections	Certification of Election – By Regulatory Agency	GS2012-018 p. 21	Retain until no longer needed for agency business then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	This series covers agency copies of certification documentation of elections held and certified by a regulatory agency. (County Auditors retain <i>their</i> certification records permanently in accordance with the <i>County Auditor Records Retention Schedule</i> .)
Agency Mgmt: Elections	Elections – Held and Certified by the Local Government Agency (Official Results)	GS2012-019 p. 22	Retain for 6 years after end of calendar year <i>then</i> Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) ESSENTIAL OPR	Official core documentation for elections held and certified by the agency.
Agency Mgmt: Elections	Elections – Held by the Local Government Agency (Administration)	GS2012-020 p. 22	Retain for 1 year after certification of election then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Internal agency administration records documenting elections held and certified by the agency.



NEW RECORDS SERIES

Function: Activity	Title	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Agency Mgmt: Elections	<i>Initiative, Referenda and Recall Measures</i>	GS2012-021 p. 23	Retain for 6 years after certification of election or determination of signature insufficiency <i>then</i> Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR	Provides specific disposition authority for these records.
Agency Mgmt: Elections	<i>Oaths of Office – Not Filed or Recorded with County Auditor</i>	2012-023 p. 24	Retain for 6 years after end of term of office or appointment then Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) ESSENTIAL OPR	Oaths which have <u>not</u> been filed or recorded with the County Auditor. (Companion series GS50-05A-15 covers oaths which <u>have</u> been filed or recorded and are designated Archival in the <i>County Auditor Records Retention Schedule</i> .)
Agency Mgmt: Emergency Planning, Response, Recovery	<i>Emergency/Disaster Preparedness – Contact Information</i>	2012-024 p. 25	Retain until obsolete or superseded then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OFM	This frequently-updated information is especially common in school classrooms.
Agency Mgmt: Emergency Planning, Response, Recovery	<i>Emergency/Disaster Response/Recovery – Routine or Minor</i>	2012-025 p. 26	Retain for 6 years after matter resolved/recovery complete then Destroy	NON-ARCHIVAL NON-ESSENTIAL OPR	Covers records of emergencies/disasters which have minimal impact on the agency's normal operations . Companion series to GS50-18-29 (uncommon and/or major emergencies) and GS2011-177 or GS50-19-14 (hazardous materials disasters).
Agency Mgmt: Legal Affairs	<i>Code Enforcement</i>	2012-026 p. 29	Retain for 6 years after matter resolved then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Covers code enforcement where <u>not</u> covered in the <i>Law Enforcement Records Retention Schedule</i> . Covers violations of many types, including parking, fire code, land use, business and personal license, etc. Includes records from multiple discontinued <i>LGRRS</i> series.
Agency Mgmt: Meetings and Hearings	<i>Meetings – Advisory</i>	2012-027 p. 36	Retain for 6 years after end of calendar year then Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR	Covers meeting records of advisory bodies, which are no longer covered by GS50-05A-13, <i>Meetings – Governing/ Executive</i> . (Governing/Executive meeting records are Archival – <i>Permanent Retention</i> . Advisory body meeting records are Archival – <i>Appraisal Required</i> .)



NEW RECORDS SERIES

Function: Activity	Title	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Agency Mgmt: Reporting	Reporting/Filing (Mandatory) – Agency Mgmt	2012-028 p. 42	Retain for 6 years after report or document submitted then Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR	Covers mandatory general agency reporting/filing that does not solely relate to specific functions (which is covered by companion series in Financial Mgmt., Asset Mgmt., etc.). Provides disposition authority for reports required of Prosecuting Attorneys, and consolidates discontinued CORE series GS50-01-41, <i>Public Disclosure Lobbying Reporting</i> and GS50-05A-25, <i>Special Purpose District information Statement</i> .
Agency Mgmt: Training	Agency-Provided Training – Hazardous Materials Handling	2012-029 p. 49	Retain for 50 years after training provided then Destroy.	NON-ESSENTIAL ESSENTIAL OFM	Covers the agency-provided <u>training</u> portion of the records previously covered by GS50-19-09 (<i>Authorizations/ Certifications – Human Resources (Hazardous Materials Handling)</i>) and all other non-radiological hazardous materials handling/exposure training. (GS50-19-19 now covers solely the evidence of the <u>certification</u> and aligns with other authorization/ certification series).
Asset Mgmt: Acquisition/ Ownership	Capital Assets (Other) and Non- Capital Tracked Assets	2012-030 p. 51	Retain for 4 years after disposition of asset or until disposition of asset and completion of SAO examination report, whichever is sooner, then Destroy.	NON-ARCHIVAL ESSENTIAL OPR	Consolidation of all non-real property capital asset acquisition/ownership records. (Includes records from discontinued CORE series GS50-06E-02.)
Asset Mgmt: Acquisition/ Ownership	County Engineer Records	2012-031 p. 53	Retain for the life of the agency then Transfer to WSA for permanent retention.	ARCHIVAL (Permanent Retention) ESSENTIAL OPR	Acknowledges County Engineer s as the office of record for roads & bridges (etc.) history records pursuant to RCW 36.80.040 .
Asset Mgmt: Acquisition/ Ownership	Naming (Assets)	2012-032 p. 54	Retain until no longer needed for agency business <i>then</i> Transfer to WSA for permanent retention.	ARCHIVAL (Permanent Retention) NON-ESSENTIAL OPR	Specific disposition authority provided.



NEW RECORDS SERIES

Function: Activity	Title	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Asset Mgmt: Authorization/ Certification	Authorizations/ Certifications – Assets	2012-033 p. 55	Retain for 6 years after authorization superseded or terminated <u>and</u> conditions of authorization satisfied <u>and</u> violations (if any) corrected <u>then</u> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Covers authorizations relating to agency assets. Consolidation of multiple discontinued records series. (NPDES permits are Archival for Department of Ecology.)
Asset Mgmt: Authorization/ Certification	Designations (Assets)	2012-034 p. 56	Retain until no longer needed for agency business then Transfer to WSA for permanent retention.	ARCHIVAL (Permanent Retention) NON-ESSENTIAL OPR	Covers asset designations received by the local government agency. (Heritage/landmark designations, etc.) Designated by State Archivist as Archival – Permanent Retention.
Asset Mgmt: Construction	As-Built Drawings – Appraised and <u>Not</u> Selected for Archival Preservation	2012-035 p. 57	Retain until structure no longer owned by agency then Transfer to new owner or Destroy.	NON-ARCHIVAL ESSENTIAL OPR	Covers as-builts that are appraised by WSA and <u>not selected</u> to be transferred to WSA. (Companion series to GS50-18-06, which covers as-builts that are appraised by WSA and <u>selected</u> for transfer to WSA.)
Asset Mgmt: Construction	IT Applications – Noteworthy	2012-036 p. 61	Retain until no longer needed for agency business <u>then</u> Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR	Designated by State Archivist as Archival – Appraisal Required.
Asset Mgmt: Inspection/ Monitoring	Inspections/ Monitoring – Non- Regulated	2012-037 p. 69	Retain until no longer needed for agency business <u>then</u> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Covers non-regulated inspections and monitoring. Companion series to other records series covering monitoring and inspections.
Asset Mgmt: Inspection/ Monitoring	Inspections/ Monitoring – Regulated (Non- Environmental)	2012-038 p. 71	Retain for 6 years after end of calendar year and violations (if any) corrected <u>then</u> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Covers regulated non-environmental inspections. Companion series to other records series covering monitoring and inspections.
Asset Mgmt: Maintenance	Maintenance – Major and/or Regulated	2012-039 p. 75	Retain for 6 years after asset no longer owned by agency then Destroy.	NON-ARCHIVAL ESSENTIAL OPR	Consolidated multiple records series covering all major maintenance <u>and</u> any/all maintenance required by regulatory agencies. Companion series to GS2012-040 which covers minor non-regulated maintenance .



NEW RECORDS SERIES

Function: Activity	Title	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Asset Mgmt: Maintenance	Maintenance – Minor Non-Regulated	2012-040 p. 76	Retain for 3 years after end of fiscal year then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Consolidated multiple records series covering minor maintenance that is not required by regulatory agencies.
Asset Mgmt: Planning	Capital Construction Projects – Preliminary Plans (Project Not Completed)	2012-041 p. 77	Retain for 6 years after decision not to proceed then Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR	Specific disposition authority provided.
Asset Mgmt: Planning	Long-Range Asset Plans (Development)	2012-042 p. 78	Retain for 6 years after final version completed then Destroy.	NON-ESSENTIAL NON-ESSENTIAL OPR	Companion series to GS51-07-15, <i>Long-Range Asset Plans (Final Version)</i> .
Asset Mgmt: Planning	Short-Term/Routine Asset Plans	2012-043 p. 79	Retain until no longer needed for agency business then Destroy.	NON-ESSENTIAL NON-ESSENTIAL OFM	Specific disposition authority provided.
Asset Mgmt: Reporting	Reporting/Filing (Mandatory) – Assets	2012-044 p. 80	Retain for 6 years after report or document submitted then Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR	Series covers all reports (and other documents) submitted to outside agencies that specifically relate to the agency's assets. Provides specific disposition authority for reports required of Prosecuting Attorneys.
Asset Mgmt: Usage and Operations	Usage and Dispersal (Assets)	2012-045 p. 86	Retain for 4 years after end of fiscal year <i>or</i> until completion of SAO report, <i>whichever is sooner then</i> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	New series to consolidate records relating to asset usage. Covers records from 10 discontinued <i>CORE</i> series.
Financial Mgmt: Accounting	Billing Stubs	2012-046 p. 87	Retain for 4 years after end of fiscal year <i>or</i> until completion of SAO report, <i>whichever is sooner then</i> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OFM	Covers billing stubs (remittance advices, payments stubs, etc.) for all local government agencies. (Series imported from <i>Public Utilities Records Retention Schedule</i> .)
Financial Mgmt: Accounting	Collection Agency Reports	2012-047 p. 88	Retain for 4 years after end of fiscal year <i>or</i> until completion of SAO report, <i>whichever is sooner then</i> Destroy.	NON-ARCHIVAL NON-ESSENTIAL OFM	Covers reports generated by collections agencies itemizing collections activities performed on behalf of the local government agency. (Series imported from <i>Public Utilities Records Retention Schedule</i> .)



NEW RECORDS SERIES

Function: Activity	Title	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Financial Mgmt: Planning	<i>Impact Fees – Rate Setting</i>	2012-048 p. 102	Retain for 6 years after rates superseded then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Specific disposition authority provided.
Human Resource Mgmt: Position Development/ Staff Structure	<i>Organizational Charts</i>	2012-049 p. 131	Retain until superseded then Transfer to WSA for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR	Specific disposition authority provided.



RECORDS SERIES IMPORTED FROM LOCAL GOVERNMENT GENERAL RECORDS RETENTION SCHEDULE (LGGRRS)

The records series listed below have been imported from LGGRRS ver. 5.2.

The DANs remain the same; *the revision # increases by one.* (Records series appear in CORE 3.0 page order.)

DAN	LGGRRS 5.2 Title	LGGRRS 5.2 Retention	CORE 3.0 Title (if different)	CORE 3.0 Retention (if different)	Change and/or rationale
GS50-16-09 LGGRRS p.66 CORE p. 11	Local Government Jurisdictional Boundary Change History Files	PERMANENT – Potential archival value. (Essential)	Jurisdictional Boundary – Official	Retain until no longer needed for agency business then Transfer to WSA for permanent retention.	Consolidation. Series transferred from LGGRRS, Land Use Planning section. GS50-16-09 covers records relating to the agency's <i>official jurisdictional boundary</i> including documentation of its physical features. The State Archivist has designated this series Archival – Permanent Retention. (Essential)
GS52-03A-05 LGGRRS p.65 CORE p. 12	Local Government Jurisdictional Boundary Change Files	PERMANENT – Potential archival value. (Essential)	Jurisdictional Boundary – Development	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	GS52-03A-05 covers the development of boundary change proposals. These are Archival – Appraisal Required. (Essential)
GS50-18-38 LGGRRS p.110 CORE p. 12	Reference Maps and Drawings	Destroy when obsolete or superseded – Potential archival value.	Jurisdictional Reference – Maps, Drawings, Photographs	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	GS50-18-38 covers maps, drawings and photographs that are used for staff reference and/or public information. These are also Archival – Appraisal Required. (Essential)
GS52-07-03 LGGRRS p.95 CORE p. 28	Civil Topical and Working Files	Destroy when obsolete or superseded. Potential archival value.	Civil Topical and Working Files	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	This CORE series covers records where the attorney is acting as legal counsel for the local government agency. The <i>Prosecuting Attorney and Assigned Counsel Records Retention Schedule</i> covers cases where the prosecuting attorney or public defender serves as the attorney on non-agency matters.
GS50-18-08 LGGRRS p. 106 CORE p. 69	Bridge Inspection Files	Life of structure plus 10 years.	Inspections – Bridges	Retain for 6 years after asset no longer owned by agency then Destroy.	Title, definitions and cut-off language updated. Minimum retention reduced. Exclusion added for records retained by the County Engineer.
GS50-18-34 LGGRRS p.115 CORE p. 72	Traffic Count Reports	Destroy when obsolete or superseded – Potential Archival Value.	Monitoring (Traffic) – Analysis	Retain for 6 yrs after analysis or report completed <i>then</i> Transfer to WSA for appraisal and selective retention.	Because so much raw data is now created electronically, it is no longer feasible (or useful) to retain it once analysis has taken place. These two series have been revised to clearly delineate <i>raw data</i> from <i>analysis</i> .
GS50-18-33 LGGRRS p.115 CORE p. 72	Traffic Count Data	6 years.	Monitoring (Traffic) – Raw Data	Retain until no longer needed for agency business <i>then</i> Destroy.	



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-01-42 Ver 2.2 p.5 Ver 3.0 p.9	Accreditation, Certification, & License Documentation for Agency Functions & Operations	Until superseded or terminated plus 6 years.	Authorizations/ Certifications – Agency Mgmt	Retain for 6 years after authorization superseded or terminated and conditions of authorization satisfied and violations (if any) corrected then Destroy.	Title modified to align with companion series in other functional areas; description clarified to specify authorizations required by and/or received by the local government agency relating to general agency operations. Series now designated ESSENTIAL.
GS50-01-12 Ver 2.2 p.6 Ver 3.0 p.6	Communications – Governing/ Executive/ Advisory	Retain for 2 yrs after communication received or provided, whichever is later then Transfer to WSA for appraisal and selective retention.	No change.	No change.	Descriptions modified to clarify that records sent or received by non-executive staff on behalf of the executives or governing/advisory members are covered by GS50-01-12. (Non-executive staff members may have <i>some records</i> covered by this series, and <i>other records</i> covered by GS2010-001 – or other more specific records series – depending on the function and purpose of the records.)
GS2010-001 Ver 2.2 p.7 Ver 3.0 p.7	Communications – Non-Executive	Retain for 2 yrs after communication received or provided, whichever is later then Destroy.	No change.	No change.	
GS50-06F-03 Ver 2.2 p.7 Ver 3.0 p.8	Informational Reports Compiled for Agency Use	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	No change.	No change.	Descriptions clarified to specify that these series should only be used when the records are not covered by a more specific records series in <i>CORE</i> or sector schedules.
GS50-01-39 Ver 2.2 p.8 Ver 3.0 p.8	Project Files (Miscellaneous)	Completion of Project plus 6 years -Potential archival value.	No change.	Retain for 6 years after completion of project then Transfer to WSA for appraisal and selective retention.	
GS50-01-32 Ver 2.2 p.8 Ver 3.0 p.8	Research/Program Reports, Studies, Surveys, Models and Analyses	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	No change.	No change.	



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in CORE 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-05A-04 Ver 2.2 p.9 Ver 3.0 p.42	Annual Reports – Adopted	PERMANENT as adopted – 1 copy archival.	No change.	Retain until no longer needed for agency business <i>then</i> Transfer to WSA for permanent retention.	Designation changed to Archival – Permanent Retention; retention language adjusted accordingly.
GS50-05A-15 Ver 2.2 p.9 Ver 3.0 p. 23	Oaths of Office	End of term of office plus 6 years.	Oaths of Office –Filed or Recorded with County Auditor	Retain for 6 years after end of term of office or appointment then Destroy.	Title, description, designation and retention modified to specify that this series covers only oaths that <u>have</u> been filed or recorded with the County Auditor (where they are designated Archival). Companion series (GS2012-023) covers oaths <u>not</u> filed or recorded with the County Auditor.
GS50-05A-16 Ver 2.2 p.9 Ver 3.0 p.33	Ordinances and Resolutions	PERMANENT – Potential archival value.	Ordinances and Resolutions – Approved	Retain until no longer needed for agency business then Transfer to WSA for permanent retention.	Changed archival designation to “Archival - Permanent Retention” due to the significance of these records. (Once records are transferred to Washington State Archives, agencies no longer bear the responsibility of retaining them permanently.)
GS50-01-25 Ver 2.2 p.9 Ver 3.0 p.33	Ordinance and Resolution Development Files	3 years – Potential archival value.	Ordinances and Resolutions – Development	Retain for 3 years after approval or decision not to proceed <i>then</i> transfer to WSA for appraisal and selective retention.	Title, description and retention/cut-off modified to provide clarity and provide disposition authority for the <i>development</i> of ordinances and resolutions, including those that are (ultimately) not submitted for approval.
GS50-01-09 Ver 2.2 p.11 Ver 3.0 p.14	Citizens’ Complaints/ Requests	Matter closed plus 3 years.	Citizen Complaints/ Requests	Retain for 3 years after matter closed then Destroy.	Added exclusion for code violation complaints covered by GS2012-026 (6 years).
GS2011-169 Ver 2.2 p.14 Ver 3.0 p. 18	Contracts and Agreements – Capital Assets (Non-Real Property)	Retain for 6 years after completion of transaction or term/expiration of instrument & 6 years after disposition of asset (if asset owned by agency) then Destroy.	No change.	No change.	Description modified to include: <ul style="list-style-type: none"> • negotiations and compliance monitoring; • non-real property bond, grant and levy contracts; • franchises and rights-of-way granted to the agency (common to utility service providers). Important: Franchises granted <u>by</u> the agency are covered by GS50-05A-10. Designation changed to ESSENTIAL.



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in CORE 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-01-11 Ver 2.2 p.15 Ver 3.0 p. 19	Contracts and Agreements – General	Retain for 6 years after completion of transaction or termination/expiration of instrument <i>then</i> Destroy.	No change.	No change.	Description modified to include negotiations & compliance monitoring; fidelity and surety coverage bonds; ongoing exemptions and discounts/rate reductions. (<u>Excludes</u> one-time rebates, which are covered by <i>Financial Transactions – General</i> (GS2011-184) and/or, if the funds are part of a grant program, <i>Financial Transactions – Bond, Grant and Levy Projects</i> (GS2011-183). Designation changed to ESSENTIAL.
GS55-05A-09 Ver 2.2 p.19 Ver 3.0 p. 31	Evictions, Liens, Foreclosures, Condemnations	Retain for 10 years after matter resolved then Destroy.	No change.	No change.	Encroachment reference updated to GS55-05A-06, <i>Capital Assets (Real Property)</i> .
GS2011-173 Ver 2.2 p.21 Ver 3.0 p.34	Appeals Hearings – Local Decision-Making Bodies (General)	Retain for 6 years after final disposition of case then Transfer to WSA for appraisal & selective retention.	No change.	No change.	Public notices were removed from descriptions; notices are now covered by new series, <i>Public Notice (Official)</i> (GS2012-026 - Retain for 6 years after notice published or 6 years after published event completed, whichever is later then Destroy.) IMPORTANT: Land use valuation appeals records have been removed from GS2011-174 and are now covered by GS2011-173, <i>Appeals Hearings – Local Decision-Making Bodies (General)</i> and are designated “Archival – Appraisal Required”.
GS2011-174 Ver 2.2 p.22 Ver 3.0 p.35	Appeals Hearings – Local Decision-Making Bodies (Land Use/Valuation)	Retain for 6 years after final disposition of case then Transfer to WSA for permanent retention.	Appeals Hearings – Local Decision-Making Bodies (Land Use)		
GS2011-175 Ver 2.2 p.24 Ver 3.0 p. 37	Meetings – Inter-Agency	Retain for 6 years after final disposition of case then Transfer to WSA for appraisal & selective retention.	No change.		
GS50-05A-13 Ver 2.2 p.23 Ver 3.0 p. 37	Meetings – Governing/ Executive/Advisory	Retain for 6 years after final disposition of case then Transfer to WSA for permanent retention.	Meetings – Governing/ Executive	No change.	Meetings of advisory bodies removed. New series (GS2012-027) created to cover them. Public notices removed from description; notices are now covered by new series, GS2012-016.
GS50-05A-01 Ver 2.2 p.26 Ver 3.0 p.10	Agency Charters and By-Laws	PERMANENT – Potential archival value.	Charter and Bylaws – Adopted	Retain until superseded then Transfer to WSA for permanent retention.	Title, description and retention/cut-off enhanced. Changed archival designation to “Archival - Permanent Retention” due to the significance of these records.



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-05A-07 Ver 2.2 p.26 Ver 3.0 p. 11	Charter History Files	Agency option – Potential archival value.	Charter and Bylaws – Development	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	Title, description and retention/cut-off modified to provide clarity and provide disposition authority for the records relating to the <i>development</i> of charters AND bylaws.
GS50-14-03 Ver 2.2 p.26 Ver 3.0 p. 25	Emergency Preparedness and Recovery Plans	Retain for 6 years after obsolete or superseded then Destroy.	No change.	No change.	Added “essential records lists” AND added exclusion for hazardous materials/dangerous waste management plans covered by GS50-19-08 (Archival).
GS50-05A-10 Ver 2.2 p.27 Ver 3.0 p. 20	Franchises	Termination or withdrawal plus 6 years – Potential archival value.	Franchise Requests – Granted by Agency	Retain for 6 years after termination or withdrawal of franchise agreement then Transfer to WSA for permanent retention.	Modified title and provided description to clarify this series covers only franchise requests granted <u>BY</u> the agency. (Franchises granted <u>TO</u> the agency are covered by Contracts and Agreements – Non-Capital Assets (GS2011-169). New series added (GS2012-017) to cover franchise proposals submitted to <u>or</u> requested by the agency that are NOT granted.
			OR Franchise Requests – Declined GS2012-017 p. 20	Retain for 6 years after request declined then Destroy.	
GS50-01-24 Ver 2.2 p.28 Ver 3.0 p. 41	Official Agency Policy & Procedure Directives, Regulations and Rules	Adoption – Permanent.	No change.	Retain until no longer needed for agency business then Transfer to WSA for permanent retention.	Due to the long-term significance of these records, the State Archivist has designated them Archival – Permanent Retention.
GS50-06C-03 Ver 2.2 p.31 Ver 3.0 p. 44	Accidents/Incidents – No Claim Filed (Under Age 18)	Retain for 3 years after individual reaches age 18 then Destroy.	No change.	No change.	Added exclusion of GS50-19-03, <i>Accidents/Incidents (Hazardous Materials) – No Human Exposure</i> (50 yrs.).
GS2010-081 Ver 2.2 p.31 Ver 3.0 p. 45	Accidents/Incidents – No Claim Filed (Age 18 and Older)	Retain for 3 years after date of incident then Destroy.			
GS50-06C-35 Ver 2.2 p.33 Ver 3.0 p. 46	Permission for Minors to Participate	Retain for 3 years after individual reaches age 18 then Destroy.	No change.	No change.	Added exclusion of PR50-13C-19 (Recreation Class Attendance Records) in the <i>Parks, Recreation and Culture Records Retention Schedule</i> .



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-18-29 Ver 2.2 p.33 Ver 3.0 p. 26	Storm/Disaster Response Action Files	6 years – Potential Archival Value.	Emergency/Disaster Response/Recovery – Uncommon or Major	Retain for 6 years after matter resolved/recovery complete <i>then</i> Transfer to WSA for appraisal & selective retention.	Title and description enhanced to clarify scope. Companion series to GS2012-025, (routine and/or minor emergencies) and GS2011-177 and GS50-19-14 (hazardous materials emergencies).
GS2011-178 Ver 2.2 p.34 Ver 3.0 p. 47	Agency-Provided Training – Curriculum Development	Retain until curriculum no longer provided by agency then Destroy.	Agency-Provided Training – Curriculum and Materials Development	No change.	Added “and Materials” to title to provide additional clarity. Also added exclusion for final curriculum & materials covered by GS2011-180 and PreK-12 education covered by the <i>School Districts & ESD</i> schedule.
GS2011-179 Ver 2.2 p.34 Ver 3.0 p. 47	Agency-Provided Training – Arrangements	Retain until no longer needed for agency business then Destroy.	No change.	No change.	Added exclusion of PreK-12 education covered by the <i>School Districts & ESD</i> schedule.
GS2011-180 Ver 2.2 p.35 Ver 3.0 p. 48	Agency-Provided Training – Certificated, Hours/Credits Earned, or Mandatory	Retain for 6 years after training provided then Destroy.	No change.	No change.	Description modified to exclude in-service education programs, which have a 7-year minimum retention and are covered by SD51-04G-01 in the <i>School Districts and ESDs schedule</i> . Removed hazardous materials/waste training – now covered by GS2012-029 (50 years). Added “recreational courses”; removed bulleted item excluding financial records. (Financial records ARE still excluded.)
GS2011-181 Ver 2.2 p.36 Ver 3.0 p. 50	Agency-Provided Training – General	Retain for 3 years after training provided then Destroy.	No change.	No change.	Removed bulleted item excluding financial records. (Added exclusion of financial records to activity description. Financial records ARE still excluded.)
GS50-06B-26 Ver 2.2 p.37 Ver 3.0 p.126	Confined Space Permit Files	1 year.	No change.	Retain for 1 year after obsolete or superseded then Destroy.	Exclusion added to ensure that any records that document atmospheric monitoring of confined spaces must be retained for 30 years (WAC 296-809-50006) and are covered by GS51-07-10.



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-18-10 Ver 2.2 p.38 Ver 3.0 p.58 and 59	Construction Project Files	Completion of project plus 6 years.	Construction Project Files	Retain for 6 years after completion of project or terms of grant agreement, whichever is later <i>then</i> Transfer to WSA for appraisal and selective retention.	Description enhanced to encompass planning, design and construction phases of agency's structures and infrastructures. Many examples given to provide clarity. Designation changed from "Non-archival" to "Archival – Appraisal required". (Covers records from multiple discontinued <i>CORE</i> and <i>LGRRS</i> series.)
GS50-18-06 Ver 2.2 p.38 Ver 3.0 p.57	As-Built Construction Project Plans	Life or sale of facility plus 3 years Potential archival value .	As-Built Drawings – Appraised and Selected for Archival Preservation OR	Retain until completion of project then Transfer original to WSA for permanent retention.	Title and description enhanced to include structures <i>and</i> infrastructure, and also redesigns, remodels and renovations. Companion series added so that final as-built drawings with historical significance are transferred to – and protected by – WSA. As-builts appraised by WSA and not selected for transfer to WSA can be destroyed or transferred to the new owner <i>once the agency no longer owns the asset</i> .
			As-Built Drawings – Appraised and <u>Not</u> Selected for Archival Preservation GS2012-035 p. 57	Retain until structure no longer owned by agency then Transfer to new owner or Destroy.	
GS55-05G-04 Ver 2.2 p.39 Ver 3.0 p.63	Facilities Standards and Specifications Manuals	10 years after superseded – Potential archival value.	Standards and Specifications Manuals	Retain for 6 years after superseded then Transfer to WSA for appraisal and selective retention.	Description enhanced to encompass infrastructure, as well as structures. Minimum retention reduced from 10 years to 6 years.
GS50-06B-22 Ver 2.2 p.39 Ver 3.0 p.60	Installed Equipment/System Documentation Facility and Property Mgmt	6 years after the equipment or system is disposed of or replaced.	Facility Systems/Equipment	Retain for 6 years after the system or equipment is replaced or disposed of then Destroy.	Title modified and description enhanced to provide additional guidance.
GS50-06E-08 Ver 2.2 p.40 Ver 3.0 p. 64	Equipment and Vehicle Sale and Salvage Record	6 years.	Disposal of Assets (Non-Real Property)	Retain for 6 years after disposal of asset then Destroy.	Title modified and description enhanced to provide additional guidance. Provides disposition authority for <i>non-financial</i> records documenting the disposal of non-real property assets. Includes (non-real property) disposal records previously covered by discontinued <i>CORE</i> series GS50-08C-02 and GS50-08C-07.



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS2010-002 Ver 2.2 p.41 Ver 3.0 p.81	Access Authorization (Network/System/Data) - Employee	Retain for 6 years after termination of user's access or 6 years after system no longer in use, whichever is sooner then Destroy.	Access Authorization – Employee	Retain for 6 years after termination of user's access or 6 years after system or asset no longer in use, whichever is sooner, then Destroy.	Title and description enhanced to include records relating to authorizations for access to any/all of the agency's assets. Now covers records from discontinued <i>CORE</i> series GS50-04B-21 and GS50-06B-21.
GS50-06A-01 Ver 2.2 p.41 Ver 3.0 p. 77	Applications – Planning and Review	Retain for 6 years after finalization of project then Destroy.	IT Applications – Planning and Review	No change.	Added "IT" to title for easier identification (by title). Exclusion added for "noteworthy" IT applications covered by GS2012-036 (Archival). Moved to <i>Planning</i> section.
GS50-06A-03 Ver 2.2 p.42 Ver 3.0 p. 62	Applications – Technical Design and Implementation	Retain until application or version is no longer needed for agency business and all records within the application have been migrated or dispositioned in accordance with a current approved records retention schedule then Destroy.	IT Applications – Technical Design and Implementation	No change.	"IT" added to title to provide clarity. Exclusion added for "noteworthy" IT applications covered by GS2012-036 (Archival). Moved to <i>Construction</i> section.
GS2010-003 Ver 2.2 p.42 Ver 3.0 p. 62	Audit Trail – Infrastructure	Retain for 1 year after date of activity then Destroy.	IT Audit Trail – Infrastructure	No change.	"IT" added to title to provide clarity. Moved to <i>Construction</i> section. Moved to <i>Construction</i> section.
GS2010-004 Ver 2.2 p.43 Ver 3.0 p.85	Automated/Scheduled Tasks	Retain until no longer needed for agency business then Destroy.	IT Automated/Scheduled Tasks	No change.	"IT" added to title to provide clarity. Moved to <i>Usage and Operations</i> section.
GS2010-005 Ver 2.2 p.43 Ver 3.0 p.85	Helpdesk Requests	Retain for 1 year after finalization of request then Destroy.	IT Helpdesk Requests	No change.	"IT" added to title to and "technology" added to description and note excluding maintenance records added to provide clarity. Moved to <i>Usage and Operations</i> section.
GS2010-006 Ver 2.2 p.43 Ver 3.0 p.63	Network – Design and Build	Retain until no longer needed for agency business then Destroy.	IT Network – Design and Build	No change.	"IT" added to title to provide clarity. Moved to <i>Construction</i> section.



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS2010-008 Ver 2.2 p.44 Ver. 3.0 p.82	Security Monitoring – Incident	Retain for 1 year after investigation finalized then Destroy.	Security Incidents and Investigations	Retain for 6 years after investigation completed or matter resolved, whichever is later then Destroy.	Consolidation of ALL asset-related security incidents and investigations. Now covers records from discontinued <i>CORE</i> series GS50-06B-19 (Weapons Confiscation Log) and GS50-06B-11 (Vandalism Reports). Moved to <i>Security</i> section.
GS2010-009 Ver 2.2 p.44 Ver 3.0 p.83	Security Monitoring – No Incident	Retain until determined that no security incident has occurred then Destroy.	Security Monitoring – Routine	No change.	Title and description enhanced to encompass records documenting routine security monitoring of any/all agency assets. Moved to Security section. Includes records previously covered by discontinued <i>CORE</i> series GS50-06B-14 (<i>Intrusion Alarm Reports</i>) and GS50-06B-16 (<i>Security Patrol Log</i>). If a security incident occurs, these records are covered by GS2010-008 (above).
GS50-06A-05 Ver 2.2 p.45 Ver 3.0 p.85	Usage – Monitoring	Retain for 1 year after activity then Destroy.	IT Systems Usage	No change.	Modified title and added word “technology” to provide clarity and to align with other related series. Moved to Usage and Operations section. Removed “login records”, which are now covered by GS50-06B-20, <i>Security Monitoring – Employee and Public Access</i> .
GS50-06B-24 ver. 2.2 p. 46 ver. 3.0 p. 53	Environmental Site Assessment	Retain until obsolete or superseded or 10 years after property no longer owned by agency, whichever is later then Transfer to WSA for appraisal and selective retention.	Environmental Site Assessments – Asset Not Acquired OR	Retain until no longer needed for agency business then transfer to WSA for appraisal and selective retention.	Refined series based on the function of the record. Now covers only assets that are <u>NOT</u> acquired by the agency. If asset is acquired, site assessments are covered by GS55-05A-06 – <i>Capital Assets (Real Property)</i> .
			Capital Assets (Real Property) GS55-05A-06 p. 52	Retain for 10 years after disposal of real property then transfer to WSA for appraisal and selective retention.	
GS51-07-10 Ver 2.2 p.46 Ver 3.0 p.70	Environmental Monitoring	Disposition of land or facility plus 10 years - Potential archival value.	Inspections/ Monitoring – Regulated (Environmental)	Retain for 30 years after end of calendar year then Transfer to WSA for appraisal and selective retention.	Title and description modified to include only environmental monitoring required by regulatory agencies. (Non-regulated monitoring is covered by GS2012-037.) Moved to <i>Inspections/ Monitoring</i> section.



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-19-02 Ver 2.2 p.46 Ver 3.0 p.67	Generator Annual Dangerous Waste Report Hazardous Materials Administration	50 years.	Hazardous Materials/ Dangerous Waste – Control/Inventory/ Tracking/Disposal	Retain for 50 years after end of calendar year then Destroy.	Title revised to align with other “hazardous materials” series. Description enhanced and retention cut-off provided. Now covers records from discontinued <i>CORE</i> series GS50-19-06, GS50-19-07, GS50-11-10, GS50-19-11, and GS50-19-12. (Note: Dangerous Waste Annual Report filed with ECY is used to create annual and biennial reports to EPA and OFM, and is only retained by ECY for 9 years before destroying.)
GS50-19-03 Ver 2.2 p.47 Ver 3.0 p.44	Hazardous Materials Accident/Incident Report (No Human Exposure)	50 years.	Accidents/Incidents (Hazardous Materials) – No Human Exposure	Retain for 50 years after date of accident/incident then Destroy.	Title, description, and cut-off enhanced to provide clarity and align with other accident/incident series.
GS55-01M-04 Ver 2.2 p.48 Ver 3.0 p.65	Hazardous Waste Disposal Permits	30 years.	Authorizations/ Certifications – Hazardous Materials	Retain for 50 years after authorization superseded or terminated <u>and</u> conditions of authorization satisfied <u>and</u> violations (if any) corrected <u>then</u> Destroy.	Title revised to align with other “authorizations” series. Description enhanced and retention cut-offs provided. Retention increased to 50 years due to the significance of these records, and to align with other hazardous materials records series. Moved to <i>Hazardous Materials Management</i> section.
GS50-19-08 Ver 2.2 p.48 Ver 3.0 p.68	Hazardous Materials Mgmt Plan	50 years.	Hazardous Materials/ Dangerous Waste – Plans	Retain for 6 years after obsolete or superseded <u>then</u> Transfer to WSA for appraisal and selective retention.	Description enhanced and retention modified. Due to the long-term significance of these records, the State Archivist has designated them Archival – Permanent Retention. Now covers records from discontinued <i>CORE</i> series GS50-19-16. Moved to <i>Hazardous Materials Management</i> section.



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-19-09 Ver 2.2 p. 48 Ver 3.0 p.111	Hazardous Materials Trained Personnel List	50 years.	Authorizations/ Certifications – Human Resources (Hazardous Materials Handling)	Retain for 50 years after authorization superseded or terminated <i>then</i> Destroy.	Titles and descriptions for these 3 series modified to include all authorizations/certifications acquired by local government agency employees that are either required by or received from regulating authorities. GS2011-190 Covers new requirement for appointed counsel per Supreme Court Order #25700-A-1004 . GS50-19-09 Covers hazardous materials handling authorizations/certifications. Also includes trained personnel lists.
GS2011-190 Ver 2.2 p.87 Ver 3.0 p.110	Authorizations Received from Regulatory Agencies – HR (General)	Retain for 6 years after authorization superseded or terminated <i>then</i> Destroy.	Authorizations/ Certifications – Human Resources (General)	Retain for 6 years after authorization/certification superseded or terminated <i>then</i> Destroy.	
GS2011-191 Ver 2.2 p.87 Ver 3.0 p.111	Authorizations Rec'd from Regulatory Agencies – HR (Health Care Providers Licensed by Washington State)	Retain for 8 years after authorization superseded or terminated <i>then</i> Destroy.	Authorizations/ Certifications – Human Resources (Health Care Providers Licensed by Washington State)	No change.	
GS50-18-43 Ver 2.2 p.49 Ver 3.0 p.68	Pesticide Spray Application Documentation	7 years.	Pesticide Application	Retain for 7 years after date of application of pesticide <i>then</i> Destroy.	Title, description and retention language modified for clarity. Moved to <i>Hazardous Materials Management</i> section.
GS50-19-15 Ver 2.2 p. 50 Ver 3.0 p. 66	Superfund Toxic Chemical Release Files	Submission of final financial status report plus 10 years Potential archival value.	Hazardous Materials/ Dangerous Waste – Abatement and Remediation	Retain for 10 years after completion of project <i>or</i> 10 years after terms of grant agreement, <i>whichever is later then</i> Transfer to WSA for appraisal and selective retention <i>and</i> Retain records <u>not</u> selected for permanent preservation for 50 years pursuant to 42 USC § 9603 (d)(2) .	Description enhanced to include any type of abasement or remediation project. Retention cut-off modified to be more inclusive. Due to the long-term significance of these records, the State Archivist has designated them Archival – Appraisal Required. <i>Security backups of these public records should be created and may be deposited with WSA in accordance with chapter 40.10 RCW.</i>



REVISED RECORDS SERIES

The records series listed below have been revised; changes and rationale are provided. (Items appear in *CORE* 2.2 page order.)

Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-03A-18 Ver 2.2 p.52 Ver 3.0 p. 73	<i>Inventory of Fixed Assets</i>	3 years or until completion of State Auditor's examination report.	<i>Inventory – Capital, Expendable, and Consumable Assets</i>	Retain for 4 fiscal years after date of inventory or until disposition of asset and completion of State Auditor's examination report, <i>whichever is sooner</i> , then Destroy.	Title, description and retention language enhanced for clarity; scope broadened to include inventories of all agency assets (excluding trees and hazardous materials). At request of SAO, retention increased to 4 years and reference added regarding capital asset tracking (GS2011-182). Now includes records from discontinued <i>CORE</i> series GS50-06B-04, GS50-08B-02, GS50-08B-03, GS50-06E-12, GS50-06E-17, GS50-06E-18 & GS50-06E-16 (partial).
GS50-08C-06 Ver 2.2 p.53 Ver 3.0 p.74	<i>Surplus Property Inventory</i>	6 years.	<i>Inventory – Surplus Property</i>	Retain for 6 years after inventory record obsolete or superseded then Destroy.	Title and retention language updated for clarity. Description provided.
GS50-06B-25 Ver 2.2 p.53 Ver 3.0 p.74	<i>Tree Inventory</i>	Until obsolete or superseded plus 3 years – Potential archival value.	<i>Inventory – Trees</i>	Retain for 3 years after inventory record obsolete or superseded then Transfer to WSA for appraisal and selective retention.	Title, description, and retention language updated for clarity.
GS50-06B-09 Ver 2.2 p.55 Ver 3.0 p.85	<i>Operating Manuals</i>	Disposition or sale of facility or equipment.	<i>Operating Manuals</i>	Retain until disposition of asset <i>then</i> Destroy <i>or</i> Transfer to new owner.	Description enhanced and retention language updated/revised to allow transfer of manuals to new owner. Excludes manuals for <i>installed</i> systems and equipment covered by GS50-06B-22. Moved to Usage and Operations section.
GS55-05A-06 Ver 2.2 p.58 Ver 3.0 p.52 and 53	<i>Land Information Files</i>	Disposition of land plus 10 years – Potential archival value.	<i>Capital Assets (Real Property)</i>	Retain for 10 years after disposition of real property and 10 years after completion of transaction or termination/expiration of instrument, then transfer to WSA for appraisal and selective retention.	Enhanced scope and description. Series is a complete record of ownership of agency's real property assets . Includes contracts and agreements (including negotiations and compliance monitoring) from discontinued <i>CORE</i> series GS2011-170, <i>Contracts and Agreements (Capital Assets (Real Property))</i> .
GS51-07-15 Ver 2.2 p.59 Ver 3.0 p.79	<i>Long-Range Facilities Plan</i>	PERMANENT Potential archival value.	<i>Long Range Asset Plans (Final Version)</i>	Retain until superseded then Transfer to WSA for appraisal and selective retention.	Clarified retention; changed title to specify <i>final version</i> (GS2012-042 covers development records); provided description.



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Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-06B-18 Ver 2.2 p.60 Ver 3.0 p.84	Surveillance Videos	Destroy when obsolete or superseded.	Security Monitoring – Oversight/ Surveillance Recordings	Retain for 30 day s after last recording or until determined that no incident occurred, whichever is sooner then Destroy.	Updated title and description to include recordings of all types of oversight and/or surveillance of agency assets. Retention modified to align with <i>State Government General Records Retention Schedule</i> and to provide a maximum retention requirement of 30 days.
GS50-06B-05 Ver 2.2 p.60 Ver 3.0 p.74	Key/Card Key Inventory	Retain until obsolete or superseded then Destroy.	Inventory – Keys/Key Cards/Badges	Retain until obsolete or superseded then Destroy.	Title, description, and retention language enhanced for clarity.
GS50-06B-20 Ver 2.2 p.61 Ver 3.0 p.83	Staff Access/Entry Logs	3 years.	Security Monitoring – Employee and Public Access	Retain for 3 years after date of report or last log entry then Destroy.	Title and description enhanced to encompass records documenting employee and public access to any/all agency assets. Includes records previously covered by discontinued <i>CORE</i> series GS50-06B-12 (<i>Visitor Logs</i>). If a security incident occurs, these records are covered by GS2010-008 (6 yrs).
GS50-03B-14 Ver 2.2 p.65 Ver 3.0 p.89	Financial Disputes and Collections – General	Retain for 6 years after matter resolved then Destroy.	No change.	No change.	Removed “liens/releases”. (If a lien is placed, real property is involved and the records are covered by GS55-05A-09 <i>Evictions, Liens, Foreclosures, Condemnations.</i>)
GS2011-183 Ver 2.2 p.66 Ver 3.0 p.90	Financial Transactions – Bond, Grant and Levy Projects	Retain for 6 years after final bond payment or 6 years after completion of levy/ grant project or terms of grant agreement, which-ever is later, then Destroy.	No change.	No change.	Added “scholarship” to description to cover scholarships <i>granted or received</i> by the agency (such as parks & recreation programs, etc.). Also clarified that series includes only NON-capital asset-related contracts and agreements (including negotiations and compliance monitoring). (Capital asset contracts are covered by GS55-05A-06 or GS2011-169.)
GS2011-184 Ver 2.2 p.67 Ver 3.0 p.91	Financial Transactions – General	Retain for 6 years after end of fiscal year then Destroy.	No change.	No change.	Series modified to include BILLING records (including utilities billing, etc.). Note: Excludes billing stubs covers by GS2012-046 and utility meter reading records covered in the <i>Public Utilities Records Retention Schedule</i> .
GS50-03C-07 Ver 2.2 p.68 Ver 3.0 p.92	Grant Applications – Not Approved	1 year.	Grant/Scholarship Applications – Not Approved	Retain for 1 year after notification of denial received or sent then Destroy.	Series modified to cover unsuccessful scholarship AND grant applications received or submitted by the agency.



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Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS51-07-21 Ver 2.2 p.82 Ver 3.0 p.54	Property Purchase Proposals (Inactive)	3 years.	Property Purchase Proposals Made by Agency – Unsuccessful	Retain for 3 years after offer declined or withdrawn then Destroy.	Title, description, and retention clarified; this series now covers ONLY real property purchase offers made <u>by</u> the local government agency – <i>where the offer is either declined by the property owner or withdrawn by the agency</i> . Successful purchase offers made <u>by</u> and <u>to</u> the agency are covered by GS55-05A-06.
GS2011-189 Ver 2.2 p.85 Ver 3.0 p.108	Reporting – Financial Mgmt	Retain for 4 years after submitted to regulatory agency then Destroy.	Reporting/Filing (Mandatory) – Financial Mgmt	Retain for 4 years after submitted to regulatory agency then Transfer to WSA for appraisal and selective retention.	Due to the long-term significance of these records, the State Archivist has designated them Archival – Appraisal Required. Title modified to include filings and to specify mandatory reporting/filing only.
GS50-03E-25 Ver. 2.2 p. 77 Ver. 3.0 p. 101	Supporting Documents and Reports – Payroll	3 years or completion of audit.	No change.	Retain for 4 years after end of fiscal year or until completion of SAO examination report, whichever is sooner, <i>then</i> destroy.	Retentions changed per State Auditor Office request.
GS50-04B-09 Ver 2.2 p.90 Ver 3.0 p.115	Requests for Leave/Overtime	3 years.			
GS50-04B-45 Ver 2.2 p.97 Ver 3.0 p.121	Civil Service Case Files – Not Heard	Administrative closure plus 3 years.	No change.	No change.	Added exclusion to provide clarity that these 5 records series cover only the local agency's records (and NOT the records of the Civil Service Commission, whose records are all designated Archival. "Excludes the records of Civil Service Commissions covered by GS2011-173 (hearings), GS50-5A-13 (meetings), and GS50-01-12 (communications)."
GS50-04B-35 Ver 2.2 p.97 Ver 3.0 p.121	Civil Service Commission Case File	Case resolved or closed plus 6 years.			
GS50-04B-37 Ver 2.2 p.97 Ver 3.0 p.121	Civil Service Comm. Exhibits – Petition for Review Filed	Petition for review or... reconsideration filed plus 3 years, whichever is later.			
GS50-04B-38 Ver 2.2 p.97 Ver 3.0 p.121	Civil Service Comm. Exhibits – Petition for Review Not Filed	Expiration of review or reconsideration period plus 3 years.			
GS50-04B-39 Ver 2.2 p.97 Ver 3.0 p.122	Civil Service Comm. Investigation Files	Case resolved or closed plus 6 years.			



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Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-04A-08 Ver 2.2 p.103 Ver 3.0 p.128	Performance Evaluation	3 years.	No change.	Retain for 3 years after completion of evaluation then Destroy.	Description modified to exclude evaluations that are related to misconduct or corrective action (which are covered in the Misconduct/Discipline/Grievance section).
GS50-04B-06 Ver 2.2 p.105 Ver 3.0 p.130	Personnel File	Retain for 6 years after termination of employment then Destroy.	No change.	No change.	Added "exit interview" to description, and removed "oaths of office". Oaths of office filed/recorded with the County Auditor are covered by GS50-05A-15 (6 yrs). (The County Auditor retains them permanently.) Those which have <u>not</u> been filed/recorded with County Auditor are covered by GS2012-023 (Archival-Appraisal Required).
GS50-05A-26 Ver 2.2 p.107 Ver 3.0 p.132	Employment Eligibility Documents – Immigration and Naturalization Services (INS) Form I-9	Date employee hired plus 3 years or termination of employment plus 1 year, <i>whichever is later</i> .	Employment Eligibility Documents – Immigration and Naturalization Services (INS)	Retain for 1 year after termination of employment or 3 years after date of hire, <i>whichever is later</i> , then Destroy.	Title and cut-off/retention modified for clarity; CFR reference corrected.
GS50-04C-05 Ver 2.2 p.109 Ver 3.0 p.134	Reporting – Human Resources	Retain for 4 years after submitted to regulatory agency then Destroy.	Reporting/Filing (Mandatory) – Human Resources	Retain for 4 years after submitted to regulatory agency then Transfer to WSA for appraisal and selective retention.	Title modified to include filings. Due to the long-term significance of these records, the State Archivist has designated them Archival – Appraisal Required.
GS50-06F-04 Ver 2.2 p.112 Ver 3.0 p.137	Publications – Master Set	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	No change.	No change.	Added official/municipal code to list of inclusions to provide guidance.
GS2010-017 Ver 2.2 p.118 Ver 3.0 p.143	Source Records – Imaged (Archival)	Retain until verification of successful conversion then Transfer to WSA for appraisal and selective retention.	No change.	No change.	Description modified to specify legacy processes – Electronic Imaging System (EIS) and Early Destruction After Digitization (DAD).



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Version 2.2 DAN	Version 2.2 Title	Version 2.2 Retention	Version 3.0 Title (if different)	Version 3.0 Retention (if different)	Change and/or rationale
GS50-09-14 Ver 2.2 p 118 Ver 3.0 p 143	Source Records – Imaged (Non- Archival)	Retain until verification of successful conversion then Destroy.	No change.	No change.	Description enhanced to include new state digitization requirements.
GS50-09-02 Ver. 2.2 p 144 Ver. 3.0 p 146	Records Control	Retain until no longer needed for agency business then Destroy.	No change.	No change.	Remove “Essential records lists”, which are now covered by GS50-14-03, <i>Emergency Disaster Preparedness and Recovery Plans</i> (6 yrs after obsolete or superseded.)
GS50-02-05 Ver. 2.2 p 124 Ver. 3.0 p 149	Transitory Records	Retain until no longer needed for agency business then Destroy.	No change.	No change.	Added “abandoned, voided or defective architectural drawings” from discontinued <i>LGRRS</i> Public Works series GS50-18-01. (Previous minimum retention was “Destroy”.)



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GS2011-170 p. 14	Agency Mgmt: Contracts & Agreements	Contracts and Agreements – Capital Assets (Real Property)	Retain for 10 years after disposition of asset <i>and</i> 10 years after completion of transaction or termination/expiration of instrument <i>then</i> Transfer to WSA for appraisal and selective retention.	Agency Mgmt: Acquisition/Ownership	GS55-05A-06 p. 52	Capital Assets (Real Property)	Retain for 10 years after disposition of asset <i>and</i> 10 years after completion of transaction or termination/expiration of instrument <i>then</i> Transfer to WSA for appraisal and selective retention.	Consolidation.
GS55-05A-04 p. 18	Agency Mgmt: Legal Affairs	Encroachments	Retain for 10 years after matter resolved then Transfer to WSA for appraisal and selective retention.					
GS50-06B-17 p. 20	Agency Mgmt: Legal Affairs	Restitution Statement	6 years.	Financial Mgmt: Accounting	GS2011-184 p. 91	Financial Transactions - General	Retain for 6 years after end of fiscal year then destroy.	Consolidation. Depending on the type of restitution statement, may be covered by one of these three series.
				Agency Mgmt: Legal Affairs	GS55-05A-09 p. 31	Evictions, Liens, Foreclosures, Condemnations	Retain for 10 years after matter resolved <i>then</i> Destroy.	
				Financial Mgmt: Accounting	GS50-03B-14 p. 89	Financial Disputes and Collections – General	Retain for 6 years after matter resolved then Destroy.	
GS50-05A-11 p. 27	Agency Mgmt: Planning, Mission and Charter	Goals & Objectives Working Files	3 years.	Agency Mgmt: Planning, Mission and Charter	GS2010-079 p. 40	Strategic Plans - Development	Retain until no longer needed for agency business then Destroy.	These records are covered by existing series, depending on whether they have to do with <i>strategic plans</i> or <i>work plans</i> .
					GS50-01-38 p. 40	Work Plans	Retain until no longer needed for agency business then Destroy.	



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GS50-01-41 p. 29	Agency Mgmt: Reporting	Public Disclosure Lobbyist Reporting	Retain for 6 years after end of fiscal year then Destroy.	Agency Mgmt: Reporting	GS2012-028 p. 42	Reporting/ Filing (Mandatory) – Agency Mgmt	Retain for 6 years after report or document submitted then Transfer to WSA for appraisal and selective retention.	Consolidation of all general agency reporting. Aligns with series in other functions (financial, asset, etc.)
GS50-05A-25 p. 29		Special Purpose District Information Statement - Annual	6 years.					
GS50-14-02 p. 31	Agency Mgmt: Risk Mgmt/ Insurance	Disaster Damage Declaration Statements	3 years Potential archival value.	Agency Mgmt: Emergency Planning, response, Recovery	GS50-18-29 p. 26	Emergency/ Disaster Response/ Recovery – Uncommon or Major	Retain for 6 years after matter resolved/ recovery complete <i>then</i> Transfer to WSA for appraisal and selective retention.	Consolidation.
GS50-06C-32 p. 32		Federal Emergency Mgmt Agency (FEMA) Claims	Claim closed plus 6 years.					
GS50-06C-09 p. 32	Agency Mgmt: Risk Mgmt/ Insurance	Fidelity and Surety Coverage Bonds	Termination of policy plus 6 years.	Agency Mgmt: Contracts & Agreements	GS50-01-11 p. 19	Contracts and Agreements - General	Retain for 6 years after completion of trans-action or termination/ expiration of instrument <i>then</i> Destroy.	Consolidation.
GS50-06C-11 p. 37	Asset Mgmt: Authorization	Fire Alarm Application	Termination plus 6 years.	Asset Mgmt: Authorizations	GS2012-033 p. 55	Authorizations/ Certifications – Assets	Retain for 6 years after authorization superseded or termination <u>and</u> conditions of authorization satisfied <u>and</u> violations (if any) corrected <i>then</i> Destroy.	Consolidation of safety inspection records and alignment with other CORE Authorizations/ Certifications series.
GS50-06B-01 p. 54	Asset Mgmt: Maintenance	Boiler Vessel Reports	DWOS					
GS50-06B-03 p. 55	Asset Mgmt: Maintenance	Fire Extinguisher Inspection Tags	DWOS					
GS50-06C-18 p. 55	Asset Mgmt: Maintenance	Insurance, Safety & Fire Insp. Rpts.	Violation corrected plus 6 years.					
GS50-06B-10 p. 56	Asset Mgmt: Maintenance	Operating Permit	DWOS					



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GS51-07-07 p. 38	Asset Mgmt: Design and Construction	Construction Log	Completion and acceptance of project plus 6 years.	Asset Mgmt: Construction	GS50-18-10 p. 58	Construction Project Files	Retain for 6 years after completion of project or terms of grant agreement, whichever is longer then Transfer to WSA for appraisal and selective retention.	Consolidation of all records relating to construction projects.
GS51-07-04 p. 38	Asset Mgmt: Design and Construction	Capital Improvement and/or Levy Planning Project Files	Completion of project. Potential archival value.					
GS50-18-07 p. 38	Asset Mgmt: Design and Construction	As-Designed Drawings	Completion of project plus 6 years.	Asset Mgmt: Construction	GS50-18-06 p. 57	As-Built Drawings – Appraised and Selected for Archival Preservation	Retain until completion of project then Transfer original to WSA for permanent retention.	ALL as-builts <u>MUST</u> be appraised by WSA. If a final set of as-built drawings <u>is</u> produced, then the as-designed drawings are retained under GS50-18-10.
				Asset Mgmt: Construction	GS2012-035 p. 57	As-Built Drawings – Appraised and <u>Not</u> Selected for Archival Preservation	Retain until structure no longer owned by agency then Transfer to new owner or destroy.	
GS50-06B-02 p. 39	Asset Mgmt: Design and Construction	Engineering and Architectural Drawings and Specifications	Disposal or sale or property plus 10 years. Potential archival value.	Asset Mgmt: Construction	GS50-18-10 p. 58	Construction Project Files	Retain for 6 years after completion of project or terms of grant agreement, whichever is later then Transfer to WSA for appraisal and selective retention.	
				Asset Mgmt: Planning	GS2012-041 p. 77	Capital Construction Projects – Preliminary Plans (Project Not Completed)	Retain for 6 years after decision not to proceed then Transfer to WSA for appraisal and selective retention.	



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GS50-08C-01 p. 40	Asset Mgmt: Disposal	Advance Notifications of Auction	3 years or completion of SAO examination report.	Agency Mgmt: Community Relations	GS2012-016 p. 16	Public Notice (Official)	Retain for 6 years after notice published or 6 years after published event completed, whichever is later, then Destroy.	Consolidation.
GS50-08C-02 p. 40	Asset Mgmt: Disposal	Auction Authorization Files	Clerk of governing council, commission or board – PERMANENT. Attach to resolution or ordinance.	Asset Mgmt: Acquisition/ Ownership	GS55-05A-06 p. 52 OR	Capital Assets (Real Property)	Retain for 10 years after disposition of real property and 10 years after completion of transaction or termination /expiration of instrument then Transfer to WSA for appraisal and selective retention.	Records relating to disposal of assets are covered by one of these two series. Note: May include copy of ordinance/resolution; originals are covered by GS50-05A-16.
GS50-08C-07 p. 40		Surplus Property Inventory Transfer Sheet	3 years.				Retain for 6 years after date of disposal of asset then Destroy.	
GS2010-010 p. 45	Asset Mgmt: Electronic Info. Systems	System Health Monitoring	Retain until no longer needed for agency business <i>then</i> Destroy.	Asset Mgmt: Inspection/ Monitoring	GS2012-037 p. 69	Inspections/ Monitoring – Non-Regulated	Retain until no longer needed for agency business <i>then</i> Destroy.	Consolidation.
GS50-11-10 p. 46	Asset Mgmt: Environmental Mgmt	Critical Matls List	Life of activity. (N/A, ESS)	Asset Mgmt: Hazardous Materials Mgmt	GS50-19-02 p. 67	Hazardous Materials/ Dangerous Waste – Control/ Inventory/ Tracking/ Disposal	Retain for 50 years after end of calendar year then Destroy.	Covers “normal” handling of hazardous materials. Excludes: Incidents (GS2011-177 & GS50-19-03); Abatement (GS55-19-15); Plans (GS50-19-08); and Pesticide Application (GS50-18-43).
GS50-19-12 p. 47		Hazardous Matls Disposal Records & Cert of Destruction	50 years. (N/A, ESS)					
GS50-19-06 p. 48		Hazardous Matls Inspection & Test Report	50 years. (N/A, ESS)					
GS 50-19-07 p. 48		Hazardous Matls Inventory Sheet	50 years. (N/A, ESS)					
GS50-19-11 p. 48		Matls Safety Data Sheet (MSDS)	30 years. (N/A, ESS)					



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GS50-19-10 p. 47	Asset Mgmt: Environmental Mgmt	Hazardous Materials Abatement Project File	50 years.	Asset Mgmt: Hazardous Materials Mgmt	GS55-19-15 p. 66	Hazardous Materials/ Dangerous Waste – Abatement and Remediation	Retain for 10 yrs after completion of project or 10 yrs after terms of grant agreement, <i>whichever is later then</i> Transfer to WSA for appraisal and selective retention <i>and</i> Retain records <u>not</u> selected for permanent preservation for 50 yrs pursuant to 42 USC § 9603 (d)(2)	Consolidation of hazardous materials abatement records. Those not selected for transfer to WSA must be retained by agency for 50 years after cut-off.
GS50-19-14 p. 49		Remedial Site Files – Superfund Site-Specific	Submission of final financial status report plus 10 yrs Potential archival value.					
GS50-19-16 p. 47	Asset Mgmt: Environmental Mgmt	Hazardous Matls Emergency Response Plan	Completion of report plus 6 years. Potential archival value.	Asset Mgmt: Hazardous Materials Mgmt	GS50-19-08 p. 68	Hazardous Materials/ Dangerous Waste - Plans	Retain for 6 years after obsolete or superseded then Transfer to WSA for appraisal and selective retention.	Consolidation.
GS50-19-05 p. 47	Asset Mgmt: Environmental Mgmt	Hazardous Matls Employee Right to Know Implement Plan	PERMANENT					
GS55-05H-01 p. 49	Asset Mgmt: Enviro Mgmt	Pollution and Pollution Control Studies	5 yrs – Potential Archival Value	Asset Mgmt: Inspection/ Monitoring	GS51-07-10 p. 10	Inspections/Monitoring – Regulated (Environmental)	Retain for 30 yrs after end of calendar yr then Transfer to WSA for appraisal and selective retention.	Consolidation. Excludes records covered in the <i>Air Pollution Control Authorities</i> and/or <i>Utility Services</i> sector schedules.
				Agency Mgmt: Administration (General)	GS50-01-32 p. 8	Research/Program Reports, Studies, Surveys, Models, and Analyses	Retain until no longer needed for agency business <i>then</i> Transfer to WSA for appraisal and selective retention.	
GS50-19-13 p. 49	Asset Mgmt: Enviro Mgmt	Notification of Dangerous Waste Activity-Hazardous Matls	Destroy when superseded or when item is no longer on hand	Asset Mgmt: Hazardous Matls Mgmt	GS50-19-02 p. 67	Hazardous Materials/ Dangerous Waste – Control/Inventory/ Tracking/Disposal	Retain for 50 years after end of calendar year then Destroy.	Consolidation.



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GS51-07-26 p. 49	Asset Mgmt: Environmental Mgmt	SEPA Environmental Impact Work Files	Issuance of permit	Asset Mgmt: Acquisition	GS55-05A-06 p. 52	Capital Assets (Real Property)	Retain for 10 years after disposition of real property <i>then Transfer</i> to WSA for appraisal and selective retention.	Consolidation. This series covers SEPA records for agency-owned properties. (Lead Agency SEPA records are covered in the <i>Land Use Planning</i> sector schedule.)
GS55-05H-02 p. 50		SEPA Determination of Significance or Non-Significance	Disposal or sale of property plus 10 years.					
GS55-05H-04 p. 50		SEPA Environmental Impact Statements	Disposal or sale of property plus 10 years - Potential archival value.					
GS55-05H-03 p. 50		SEPA Environmental Checklists	Disposal or sale of property plus 10 years.					
GS50-19-18 p. 51	Asset Mgmt: Environmental Mgmt	Underground Storage Tanks – Routine Operation and Maintenance Records	End of Calendar Year plus 10 years.	Asset Mgmt: Inspections/Monitoring	GS2012-038 p. 71	Inspection/ Monitoring – Regulations (Non-Environmental)	Retain for 6 yrs after end of calendar year <i>or</i> until completion of SAO report, <i>whichever is sooner then</i> Destroy.	Consolidation.
				Asset Mgmt: Maintenance	GS2012-039 p. 75	Maintenance –Major and/or Regulated	Retain for 6 yrs after disposal of asset <i>then</i> Destroy.	
					GS2012-040 p. 76	Maintenance –Minor Non-Regulated	Retain for 3 yrs after end of fiscal year <i>then</i> Destroy.	
				Asset Mgmt: Usage and Operations	GS2012-045 p. 86	Usage and Dispersal (Assets)	Retain for 4 yrs after end of fiscal year <i>or</i> until completion of SAO report, <i>whichever is sooner then</i> Destroy.	



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GS50-06B-04 p.52	Asset Mgmt: Inventory	Fixed Asset Inventories	Destroy when obsolete or superseded + 3 years.	Asset Mgmt: Inventory	GS50-03A-18 p. 73	Inventory – Capital, Expandable and Consumable Assets	Retain for 4 fiscal years after date of inventory <i>or</i> until disposition of asset <i>and</i> completion of SAO examination report, <i>whichever is sooner then</i> Destroy.	Title and description expanded to include all capital, expendable and consumable asset inventories <i>except for</i> trees, surplus property and hazardous materials. Minimum retention increased to 4 years per SAO request.
GS50-08B-02 p.52		Inventory of Materials Equipment Changes & Transfers	3 years.					
GS50-08B-03 p.52		Inventory/ Year-End Report	3 years.					
GS50-06E-12 p.52		Parts Control File	3 years.					
GS50-06E-17 p.52		Parts Inventory	3 years after obsolete or superseded.					
GS50-06E-18 p.52		Parts Master Listing Reports	3 years after obsolete or superseded.					
GS51-05F-01 p.54	Asset Mgmt: Maintenance	Accident/Traffic Collision Reports	Washington State Patrol retains for 6 years.	Asset Mgmt: Inspection/ Monitoring	GS50-18-33 p. 72	Monitoring (Traffic) – Raw Data	Retain until no longer needed for agency business then Destroy.	WSP retains accident/collision reports for 6 years.
GS50-06E-14 p. 54	Asset Mgmt: Maintenance	Equipment and Vehicle Safety Analysis and Investigation Files	Destroy when obsolete or superseded.	Asset Mgmt: Inspection/ Monitoring	GS2012-037 p. 69	Inspections/ Monitoring – Non-Regulated	Retain until no longer needed for agency business <i>then</i> Destroy.	Consolidation.
Note: Your agency's "safety analysis and investigation" records may be more accurately covered in records series found in the Risk Management or Purchasing sections.								



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GS50-03A-22 p. 52	Asset Mgmt: Usage	Record of Supplies Drawn from Central Stores	3 years.	Asset Mgmt: Usage and Operations	GS2012-045 p. 86	Usage and Dispersal (Assets)	Retain for 4 years after end of fiscal year <i>or</i> until completion of State Auditor's report, whichever is sooner <i>then</i> Destroy.	Consolidation. One new series created to consolidate usage and dispersal records previously covered by multiple discontinued series.
GS51-07-09 p. 57		Energy Usage Measurement Reports & Data	5 years.					
GS50-06E-10 p. 57		Fuel/Oil Usage Reports	3 years.					
GS50-06E-15 p. 57		Fuel Pump/Tank Audit Reports	2 years.					
GS50-06E-03 p. 62		Equipment/Vehicle Checkout Log	6 years.					
GS50-06E-04 p. 62		Equipment/Vehicle Data & Statistical Reports	3 years.					
GS50-06E-09 p. 62		Equipment/Vehicle Use Request	3 years.					
GS51-07-11 p. 62		Facility Rental/Use Schedule	3 years.					
GS50-08B-04 p. 81		Materials Disburse. Tickets	3 years.					
GS50-08A-15 p. 83		Stores Reports & Backup Document.	End of calendar year plus 3 years.					



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GS50-06C-08 p. 54	Asset Mgmt: Maintenance	Facility Safety Inspection History Records	Disposition of Facility.	Agency Mgmt: Authorization/ Certification	GS2012-033 p. 55	Authorizations/ Certifications – Assets	Retain for 6 yrs after authorization superseded or terminated <u>and</u> conditions of authorization satisfied <u>and</u> violations (if any) corrected <i>then</i> Destroy.	<i>Regulated</i> safety inspections are covered by GS2012-033. (L&I retains conveyance inspections for 6 years & complete boiler/ vessel history (including inspections) for 6 years after life of vessel.) Non-regulated <i>vehicle repair records</i> are covered by GS2012-039 or GS2012-040.
GS50-06B-27 p. 55		Inspection Documentation	6 years.	Asset Mgmt: Maintenance	GS2012-039 p. 75	Maintenance –Major and/or Regulated	Retain for 6 years after disposal of asset then Destroy.	
				Asset Mgmt: Maintenance	GS2012-040 p. 76	Maintenance –Minor Non-Regulated	Retain for 3 years after superseded or 3 years after end of fiscal year, whichever is longer, <i>then</i> Destroy.	
GS50-06E-13 p.54	Asset Mgmt: Maintenance	Accident/Traffic Collision Logs	6 years after last entry.	Asset Mgmt: Maintenance	GS2012-039 p. 75	Maintenance –Major and/or Regulated	Retain for 6 years after disposal of asset then Destroy.	Two new series created to consolidate maintenance records previously covered by multiple discontinued series. Note: Records documenting accidents involving agency assets are covered in the Risk Management section. Records used solely for street/ traffic planning purposes, are covered by GS2012- 042.
GS50-06E-20 p. 54		Equipment/Vehicle Maintenance Rpts	3 years.		OR			
GS50-06B-06 p.55		Maintenance History Docs	Life or sale of the facility.		GS2012-040 p. 76	Maintenance –Minor Non-Regulated	Retain for 3 years after superseded or 3 years after end of fiscal year, whichever is longer, <i>then</i> Destroy.	
GS50-06B-07 p. 55		Maintenance Logs	Destroy when superseded plus 3 years.					
GS50-06B-08 p. 55		Maintenance Reports	1 year.					
GS50-06B-13 p. 56		Work Orders	3 years.					
GS50-06E-06 p. 54		Equipment/ Vehicle Maint History Files	Until disposal or sale of equipment or vehicle.					
GS50-06E-19 p. 56		Tire Maintenance Reports	5 years.					



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GS50-06E-16 p. 57	Asset Mgmt: Operations	Fuel Storage Facility Records	3 years- Selected documents kept for life of facility.	Asset Mgmt: Authorization	GS2012-033 p. 55	Authorizations/ Certifications – Assets	Retain for 6 years after authorization superseded or terminated & conditions of authorization satisfied & violations (if any) corrected/ resolved then Destroy.	Records previously covered by <i>Fuel Storage Facility Records</i> (GS50-06E-16) are now more specifically covered by one of these series, based on the purpose and function of the record.
				Asset Mgmt: Inventory	GS50-03A-18 p. 73	Inventory – Capital, Expendable and Consumable Assets	Retain for 4 fiscal years after date of inventory or until disposition of asset and completion of SAO examination report, <i>whichever is sooner</i> , then Destroy.	
				Asset Mgmt: Maintenance	GS2012-039 p. 75	Maintenance – Major and/or Regulated	Retain for 6 years after disposal of asset then Destroy.	
				Asset Mgmt: Maintenance	GS2012-040 p. 76	Maintenance – Minor Non-Regulated	Retain for 3 years after superseded or 3 years after end of fiscal year, <i>whichever is later</i> , then Destroy.	
				Asset Mgmt: Usage and Operations	GS2012-045 p. 86	Usage and Dispersal (Assets)	Retain for 4 fiscal years after date of inventory or until completion of SAO examination report, <i>whichever is sooner</i> , then Destroy.	
GS50-06E-02 p. 58	Asset Mgmt: Ownership	Certificates of Vehicle Title	Destroy after disposition of vehicle and completion of audit.	Asset Mgmt: Acquisition/ Ownership	GS2012-030 p. 51	Capital Assets (Other) and Non-Capital Tracked Assets	Retain for 4 years after disposition of asset or until disposition of asset and completion of SAO examination report, <i>whichever is sooner</i> , then Destroy.	Consolidation of all non-real property asset ownership documentation.



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GS55-05A-02 p. 58	Asset Mgmt: Ownership	Deeds/Titles	Sale or disposal of land plus 10 years.	Asset Mgmt: Acquisition/ Ownership	GS55-05A-06 p. 52	Capital Assets (Real Property)	Retain for 10 years after disposition of real property then Transfer to WSA for appraisal and selective retention.	Consolidation of all real property asset ownership documentation.
GS51-05A-22 p. 59	Asset Mgmt: Planning	Long-Range Facilities Plan Adopted	Clerk of the Government Council, Commission or Board PERMANENT 1 copy potentially archival.	Asset Mgmt: Planning	GS51-07-15 p. 79	Long-Range Asset Plans (Final Version)	Retain until superseded then Transfer to WSA for appraisal and selective retention.	Consolidation. Plans included in the agenda packet of the governing body are covered by GS50-05A-13.
GS50-06B-15 p. 60	Asset Mgmt: Security	Security Annual Report	1 year.	Agency Mgmt: Administration (General)	GS50-06F-03 p. 8	Informational Reports Compiled for Agency Use	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	Consolidation.
GS50-04B-21 p. 60	Asset Mgmt: Security	Identification Badge Records for Contract and Temporary Employees	1 year.	Asset Mgmt: Security	GS2010-002 p. 81	Authorization – Employee Access	Retain for 6 years after termination of user's access or 6 years after system or asset no longer in use, whichever is sooner, then Destroy.	Records relating to access to any/all of the agency's assets are now consolidated into this one series. ESSENTIAL.
GS50-06B-21 p. 60	Asset Mgmt: Security	Security ID Badge Application and Issuance Documentation	Termination or revocation plus 6 years.					
GS50-06B-11 p. 61	Asset Mgmt: Security	Vandalism Reports	3 years.	Asset Mgmt: Security	GS2010-008 p. 82	Security Incidents and Investigations	Retain for 6 years after investigation completed or matter resolved, whichever is later then Destroy.	All asset-related security incidents are now covered by this series.
GS50-06B-19 p.61	Asset Mgmt: Security	Weapons Confiscation Log	6 years.					
GS50-06B-14 p. 60	Asset Mgmt: Security	Intrusion Alarm Reports	1 year.	Asset Mgmt: Security	GS2010-009 p. 83	Security Monitoring – Routine	Retain until determined that no security incident has occurred then Destroy.	Records documenting security monitoring have been consolidated.
GS50-06B-16 p. 60		Security Patrol Log	1 year.					



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GS50-06B-12 p. 61	Asset Mgmt: Security	Visitor Logs	3 years.	Asset Mgmt: Security	GS50-06B-20 p. 83	Security Monitoring – Employee and Public Access	Retain for 3 years after date of report or last log entry then Destroy.	Consolidation
GS50-06E-01 p. 62	Asset Mgmt: Usage	Billing to Other Agencies for Use of Vehicles & Equip	6 years.	Financial Mgmt: Accounting	GS2011-184 p. 91	Financial Transactions – General	Retain for 6 years after end of fiscal year then Destroy.	Consolidation.
GS55-05A-01 p. 63	Asset Mgmt: Valuation	Appraisals	Disposition of land or facility plus 10 years – Potential archival value.	Asset Mgmt: Acquisition/ Ownership	GS55-05A-06 p. 52	Capital Assets (Real Property)	Retain for 10 years after disposition of real property then Transfer to WSA for appraisal and selective retention.	Consolidation.
					GS2012-030 p. 51	Capital Assets (Other) and Non-Capital Tracked Assets	Retain for 4 years after disposition of asset or until disposition of asset and completion of SAO examination report, whichever is sooner then Destroy.	
GS50-04B-15 p. 97	HR Mgmt: Performance Mgmt.	Employee Corrective Action and Probation Documents	6 years after completion of probation or disciplinary action or destroy according to the provision of collective bargaining contracts and agreements.	HR Mgmt: Misconduct/ Discipline/ Grievance	GS50-04B-46 p. 122	Employee Misconduct Investigation Files - Sustained	Retain for 3 years after case closed then Destroy.	Consolidation; removed conflicting language and retention requirements. Records relating to employee probation where corrective action is NOT involved are covered by GS50-04A-08.
					GS50-04B-47 p. 123	Employee Misconduct Investigation Files – Unfounded	Retain until case closed then Destroy.	
				HR Mgmt: Performance Mgmt.	GS50-04A-08 p. 128	Performance Evaluations	Retain for 3 years after completion of evaluation then Destroy.	