



REVISION GUIDE

SUMMARY OF CHANGES

- The name has been changed from “*Health Districts and Departments*” to “*Health Departments and Districts*”.
- Records common to all local government agencies have been removed from this schedule and now appear in the ***Local Government Common Records Retention Schedule (CORE)***.
- All records series in the *Health Departments and Districts Records Retention Schedule* begin with the prefix “HE”; there are no changes to titles, descriptions, retention periods, or archival designations.
- Series with duplicate Disposition Authority Numbers (DANs) have been assigned new DANs.
- Duplicated series have been removed. (“Office Reference Copies” are *usually* secondary record copies and should be retained/disposed of accordingly.)
- Discontinued series have been removed.
- Four detailed indexes have been added:
 - Archival/Potentially Archival/Permanent Records
 - Essential Records
 - DANs
 - Subjects

TABLE OF CONTENTS

SERIES REMOVED FROM <i>HEALTH DEPARTMENTS AND DISTRICTS RECORDS RETENTION SCHEDULE</i> - DIFFERENT RETENTION PERIODS	2
DUPLICATE DISPOSITION AUTHORITY NUMBER (DAN) CORRECTIONS	5
DISCONTINUED DISPOSITION AUTHORITY NUMBERS (DANS) - SERIES COVERED BY <i>CORE</i> DANs	7



SERIES REMOVED FROM HEALTH DEPARTMENTS AND DISTRICTS RECORDS RETENTION SCHEDULE - Different Retention Periods

All records series which are covered by the *Local Government Common Records Retention Schedule (CORE)* have been removed. From this point forward, Disposition Authority Numbers (DANs) will be unique identifiers and will appear in only one schedule.

This table contains only those records series whose retention periods have changed. The former titles and retention requirements are shaded in gray and listed on the left side of the table; the current *CORE* disposition authorities are shown on the right.

FORMER Category	FORMER Title and Retention P= Primary S=Secondary	DAN (unchanged)	CORE Function: CORE Activity	Title and Retention P= Primary S=Secondary
Accounting - Payroll	DAILY, WEEKLY, OR MONTHLY TIME ACCUMULATION REPORTS (TIME CARDS) <i>P: If used for retirement verification - 60 year. If NOT used for retirement verification - 3 years. See remarks</i> <i>S: Destroy when obsolete or superseded</i>	GS50-03E-04	Financial Management: Payroll	TIME CARDS/TIME SHEETS <i>P: If used for retirement verification - 60 years. If NOT used for retirement verification - 4 years - see Remarks. Time records subject to federal audit should be retained per federal requirements.</i> <i>(LRC increased from 3 yrs to 4 yrs 03/2006.)</i> <i>S: Destroy when obsolete or superseded</i>
Accounting - Payroll	SUPPORTING DOCUMENTS AND REPORTS - PAYROLL <i>P: 3 years</i> <i>S: Destroy when obsolete or superseded</i>	GS50-03E-25	Financial Management: Payroll	SUPPORTING DOCUMENTS AND REPORTS - PAYROLL <i>P: 3 years or until completion of audit</i> <i>S: Destroy when obsolete or superseded</i>
Administrative Records Common to All Agency Work Units	CITIZENS' COMPLAINTS/REQUESTS <i>P: 3 years</i> <i>S: Destroy when obsolete or superseded.</i>	GS50-01-09	Agency Management: Community Relations	CITIZENS' COMPLAINTS/REQUESTS <i>P: Matter Closed plus 3 years</i> <i>S: Destroy when obsolete or superseded</i>
Governing Councils, Commissions and Boards	OATHS OF OFFICE <i>P: PERMANENT</i> <i>S: Destroy when obsolete or superseded.</i>	GS50-05A-15	Agency Management: Boards, Councils and Committees	OATHS OF OFFICE <i>P: End of term plus 6 years (LRC reduced 09/2005.)</i> <i>S: Destroy when obsolete or superseded.</i>
Insurance/Risk Management	CERTIFICATION OF EMPLOYER AS SELF-INSURER <i>P: Department of Labor and Industries keeps primary copy - Termination plus 6 years</i> <i>S: Keep until certification withdrawn or surrendered</i>	GS50-06C-05	Human Resource Management: Industrial Insurance	SELF-INSURED EMPLOYER CERTIFICATION <i>P: Department of Labor and Industries keeps primary copy - Termination plus 6 years</i> <i>S: Retain 1 copy until certification withdrawn or surrendered plus 2 years. (LRC increased retention 03/2003.) For all other copies, destroy when obsolete or superseded.</i>



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Insurance/ Risk Management	INSURANCE AND SAFETY INSPECTION REPORTS <i>P: Termination of policy plus 6 years S: Destroy when obsolete or superseded</i>	GS50-06C-18	Asset Management: Maintenance	INSURANCE, SAFETY AND FIRE INSPECTION REPORTS <i>P: Violation corrected plus 6 years S: Destroy when obsolete or superseded</i>
Insurance/ Risk Management	WORKER'S COMPENSATION AND EMPLOYEE LIABILITY CLAIMS <i>P: Department of Labor and Industries keeps primary copy - PERMANENT - See remarks S: Last payment plus completion of State Auditor's examination report.</i>	GS50-06C-27	Human Resource Management: Industrial Insurance	SELF-INSURED AGENCY WORKER'S COMPENSATION CLAIMS COMPENSABLE <i>P: Self-Insured employer retains 75 years after close of claim (LRC changed primary retention 03/2003.) S: L&I retains all claims records in its possession for 75 years. However, L&I cannot certify completeness of file.</i>
Personnel - Affirmative Action	EQUAL EMPLOYMENT OPPORTUNITY REPORTS <i>P: 5 years S: Destroy when obsolete or superseded</i>	GS50-04C-05	Human Resource Management: Equity	EQUAL EMPLOYMENT OPPORTUNITY REPORTS <i>P: 3 years (LRC reduced primary retention 06/2003.) S: Destroy when obsolete or superseded</i>
Personnel - General	DRUG TEST RESULTS (AGENCY EMPLOYEES) <i>P: Termination of employment plus 6 years S: Destroy when obsolete or superseded</i>	GS50-04B-27	Human Resource Management: Personnel	DRUG/ALCOHOL TEST RESULTS - POSITIVE RESULTS OR REFUSAL TO TEST (AGENCY EMPLOYEES) <i>P: Date of result plus 5 years (Changes approved by LRC 05/2004.) S: Destroy when obsolete or superseded</i>
		and/or: GS50-04B-33	Human Resource Management: Personnel	DRUG/ALCOHOL TEST RESULTS - NEGATIVE RESULTS OR CANCELED TESTS (AGENCY EMPLOYEES) <i>P: Results posted or test canceled plus 1 year S: Destroy when obsolete or superseded. (New series: 05/2004.)</i>
Personnel - General	RECRUITMENT FILES <i>P: 2 years S: Destroy when obsolete or superseded</i>	GS50-04B-22	Human Resource Management: Recruitment/Hiring	RECRUITMENT FILES <i>P: 3 years (LRC increased retention 11/2005.) S: Destroy when obsolete or superseded</i>



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FORMER Category	FORMER Title and Retention P= Primary S=Secondary	DAN (unchanged)	CORE Function: CORE Activity	Title and Retention P= Primary S=Secondary
Personnel - General	VOLUNTEER APPLICATIONS	GS50-04B-24	Human Resource Management: Recruitment/Hiring	VOLUNTEER APPLICATIONS NOT ACCEPTED OR INELIGIBLE <i>P: Application denied plus 1 year</i> <i>S: Destroy when obsolete or superseded</i> <i>(Applications for volunteers who are accepted are covered by DAN GS50-04B-10, VOLUNTEER FILES. Approved by LRC 06/2003.)</i>
Purchasing - Procurement	UNSUCCESSFUL BIDS AND PROPOSALS <i>P: 2 years</i> <i>S: Destroy when obsolete or superseded</i>	GS50-08A-11	Agency Management: Contracts/ Agreements	UNSUCCESSFUL BIDS AND PROPOSALS <i>P: 3 years (LRC increased retention 07/2003.)</i> <i>S: Destroy when obsolete or superseded</i>
Records Management	PUBLIC DISCLOSURE REQUEST FILES <i>P: Current year plus 1 year - See remarks</i> <i>S: Destroy when obsolete or superseded</i>	GS50-09-04	Information Management: Public Disclosure	PUBLIC DISCLOSURE REQUEST FILES <i>P: Requests and responses received through July 23, 2005 are retained for 5 years. Requests received on or after July 24, 2005 are retained for 1 year. See Remarks.</i> <i>S: Destroy when obsolete or superseded</i> <i>(LRC increased retention 09/2005.)</i>
Safety	FACILITY SAFETY INSPECTION HISTORY RECORDS <i>P: Disposition or sale of facility plus 10 years</i> <i>S: Destroy when obsolete or superseded</i>	GS50-06C-08	Asset Management: Maintenance	FACILITY SAFETY INSPECTION HISTORY RECORDS <i>P: Disposition of facility (LRC reduced primary retention 03/2003.)</i> <i>S: Destroy when obsolete or superseded</i>



DUPLICATE DISPOSITION AUTHORITY NUMBER (DAN) CORRECTIONS

The series listed below were assigned Disposition Authority Numbers (DANs) which had already been assigned to other records series. The new/correct DANs (and records retention schedules where they are located) are listed. There are no changes to retention periods.

Series Title	Former DAN	NEW DAN	Records Retention Schedule Function:Activity
AFFIRMATIVE ACTION STUDIES AND REPORTS	GS50-01-32	GS50-01-54	CORE Human Resource Management:Equity
APPOINTMENT REGISTER	GS55-01F-01	HE55-01W-01	Health Departments/Districts Nursing Administration:Women, Infants and Children
BENEFITS STUDIES AND SURVEYS	GS50-01-32	GS50-04D-01	CORE Human Resource Management:Benefits
COLLECTIVE BARGAINING AGREEMENTS	GS50-01-11	GS50-01-50	CORE Human Resource Management:Labor Relations
CONTRACT ADMINISTRATION FILES	GS55-01F-02	HE55-01W-02	Health Departments/Districts Nursing Administration:Women, Infants and Children
CORRESPONDENCE ADVISORY COUNCILS, COMMISSIONS, COMMITTEES, AND BOARDS	GS50-01-12	GS50-01-53	CORE Agency Management:Boards, Councils and Committees
DEPOSIT REGISTER - UTILITIES ACCOUNTING	GS50-03B-02	GS50-03B-15	LGRRS (For use by public utility districts.)
EMPLOYEE ASSISTANCE PROGRAM SUPERVISOR'S REFERRAL DOCUMENTATION	GS50-04B-27	GS50-04B-28	CORE Human Resource Management:Benefits
ENDORSE CROSS REFERENCING REPORTS, BREASTFEEDING REPORTS, OUTSTANDING FOOD INSTRUMENT REPORTS, PARTICIPANT SUMMARY REPORTS	GS55-01F-03	HE55-01W-03	Health Departments/Districts Nursing Administration:Women, Infants and Children
INELIGIBLE PATIENT CLIENT FILES	GS55-01F-04	HE55-01W-04	Health Departments/Districts Nursing Administration:Women, Infants and Children
NOISE EXPOSURE REPORTS	GS50-06D-04	GS50-06C-29	CORE Human Resource Management:Occupational Health and Safety
PARAPROFESSIONAL COMPETENCY CERTIFICATION DOCUMENTS	GS55-01F-05	HE55-01W-05	Health Departments/Districts Nursing Administration:Women, Infants and Children



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Series Title	Former DAN	NEW DAN	Records Retention Schedule Function:Activity
QUESTIONABLE FOOD INSTRUMENT REPORTS	GS55-01F-06	HE55-01W-06	Health Departments/Districts Nursing Administration:Women, Infants and Children
RECEIPTS FOR CASH RECEIVED - OFFICE REFERENCE COPIES	GS50-03A-21	GS50-03A-34	CORE Financial Management:Accounting
STATISTICAL SUMMARIES	GS55-01F-07	HE55-01W-07	Health Departments/Districts Nursing Administration:Women, Infants and Children
SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILES (Administrative Records Common to All Agency Work Units)	GS50-04B-30	GS50-04B-50	CORE Human Resource Management:Performance Management
SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILES (Personnel - General)	GS50-04B-28	GS50-04B-50	CORE Human Resource Management:Performance Management
TRANSFER/VOC TRANSMITTALS AND REGISTER	GS55-01F-08	HE55-01W-08	Health Departments/Districts Nursing Administration:Women, Infants and Children
VOTER REGISTRATION STATUS FORMS	GS55-01F-09	HE55-01W-09	Health Departments/Districts Nursing Administration:Women, Infants and Children
WAITING LISTS	GS55-01F-10	HE55-01W-10	Health Departments/Districts Nursing Administration:Women, Infants and Children



DISCONTINUED DISPOSITION AUTHORITY NUMBERS (DANs) - Series covered by CORE DANs

The series listed below originated in the *LGRRS* and were discontinued; the date of Local Records Committee decision is listed beneath the discontinued DAN. The correct DANs are listed and the locations of the series in the new *CORE* schedule are noted.

Discontinued DAN	Former Category	Former Title	Former Retention	Effective DAN	CORE Function: CORE Activity	New Title	New Retention
GS50-03A-12 09/2006	Accounting - General	FIXED ASSESTS INVENTORY DOCUMENTATION	3 years	GS50-03A-12	Financial Management: Payroll	INVENTORY OF FIXED ASSETS	3 years or until completion of State Auditor's examination report
GS50-03A-16 05/2002	Accounting - General	INTERNAL REVENUE SERVICE (IRS) FORM W-9	4 years	GS50-03A-17	Financial Management: Payroll	INTERNAL REVENUE SERVICE (IRS) FORMS	4 years
GS50-03E-12 05/2002	Accounting - Payroll	EMPLOYEE EARNINGS QUARTERLY REPORTS	4 years	GS50-03A-17	Financial Management: Payroll	INTERNAL REVENUE SERVICE (IRS) FORMS	4 years
GS50-03E-13 05/2002	Accounting - Payroll	EMPLOYEE WITHHOLDING EXEMPTION CERTIFICATES (W-4)	4 years	GS50-03A-17	Financial Management: Payroll	INTERNAL REVENUE SERVICE (IRS) FORMS	4 years
GS50-03E-14 05/2002	Accounting - Payroll	EMPLOYER'S COPIES OF FEDERAL WITHHOLDING TAX STATEMENT (W-2)	4 years	GS50-03A-17	Financial Management: Payroll	INTERNAL REVENUE SERVICE (IRS) FORMS	4 years
GS50-04B-12 08/2004	Personnel - General	EMPLOYEE CONTRACTS - FINAL	6 years	GS50-01-11	Human Resource Management: Personnel	CONTRACTS, AGREEMENTS AND WARRANTIES	Termination plus 6 years
GS50-04B-26 05/2004	Personnel - General	EMPLOYEE HEALTH HISTORY FILES	Termination of employment plus 6 years	GS50-04B-30	Human Resource Management: Occupational Health and Safety	EMPLOYEE MEDICAL AND EXPOSURE RECORDS	Termination of employment plus 30 years
GS50-04B-03 06/2003	Personnel - General	EMPLOYEE HISTORY	Termination of employment plus 6 years	GS50-04B-06	Human Resource Management: Personnel	PERSONNEL FILE	Termination plus 6 years - see remarks



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Discontinued DAN	Former Category	Former Title	Former Retention	Effective DAN	CORE Function: CORE Activity	New Title	New Retention
GS51-05D-01 12/2008	Safety	FACILITY SAFETY HISTORY RECORDS	Life of facility	GS50-06C-08	Asset Management: Maintenance	FACILITY SAFETY INSPECTION HISTORY RECORDS	Disposition of facility
GS51-05D-05 03/2003	Safety	SAFETY INSPECTION, STATE NOTICE AND CITATION	6 years	GS50-06C-08	Asset Management: Maintenance	FACILITY SAFETY INSPECTION HISTORY RECORDS	Disposition of facility