**This schedule applies to: Public Schools (K-12) and Educational Service Districts**

**Scope of records retention schedule**

This records retention schedule authorizes the destruction/transfer of the public records of public schools (such as those operated by school districts, charter schools, state government agencies, etc.) as well as educational service districts. This schedule is to be used in conjunction with the *Local Government Common Records Retention Schedule (CORE) / State Government General Records Retention Schedule (SGGRRS),* which authorizes the destruction/transfer of public records common to all government agencies.

**Disposition of public records**

Public records covered by records series within this records retention schedule (regardless of format) must be retained for the minimum retention period as specified in this schedule. Washington State Archives strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of agency resources.

Public records designated as “Archival (Permanent Retention)” must not be destroyed. Records designated as “Archival (Appraisal Required)” must be appraised by the Washington State Archives before disposition. Public records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such public records must be managed in accordance with the agency’s policies and procedures for legal holds. Public records must not be destroyed if they are subject to an existing public records request in accordance with chapter 42.56 RCW. Such public records must be managed in accordance with the agency’s policies and procedures for public records requests.

**Authority**

This records retention schedule was approved for the use by local governments by the Local Records Committee in accordance with RCW 40.14.070 on April 7, 2021.

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| *Signature on File****\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*****For the State Auditor: Al Rose** | *Signature on File****\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*****For the Attorney General: Matt Kernutt** | *Signature* *on File****\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*****The State Archivist: Steve Excell** |

This records retention schedule was approved for use by state agencies by the State Records Committee in accordance with RCW 40.14.050 on April 7, 2021.

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| *Signature on File**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***For the State Auditor:****Al Rose** | *Signature on File**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***For the Attorney General:****Suzanne Becker** | *Signature on File**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***For the Office of Financial Management:****Gwen Stamey** | *Signature on File**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_***The State Archivist:** **Steve Excell** |

**Revocation of previously issued records retention schedules**

All previously issued records retention schedules to school districts, educational service districts, Washington State School for the Blind, and Washington School for the Deaf are revoked. Agencies should take measures to ensure that the retention and disposition of public records is in accordance with current approved records retention schedules.

**Revision History**

|  |  |  |
| --- | --- | --- |
| Version | Date Approved | Extent of Revision |
| 1.0 | 1976 | Initial version. |
| 2.0 | 1980 |  |
| 2.1 | 1982-1983 |  |
| 3.0 | January 1986 | Major revision. Major revision and multiple updates. |
| 4.0 | March 31, 1994 |  |
| 5.0 | March 1999 |  |
| 5.1 | July 2001 |  |
| 5.2 | December 2001 |  |
| 6.0 | March 27, 2003 |  |
| 6.1 | May 2007 | Online version; updated electronic records information.  |
| 7.0 | July 29, 2008 | Major revision. Records series common to all local government agencies now appear in the new *Local Government Common Records* *Retention Schedule (CORE)* and have been removed from this schedule*.* All Disposition Authority Numbers (DANs) in the now begin with the prefix “SD”. |
| 7.1 | July 30, 2009 | Changes to structure/format only; no changes to records series. Indexes added.  |
| 7.2 | September 29, 2011 | Attendance/Absence section completely revised. Records series covering field trips and parental permissions updated. Two new records series added, 14 revised, and 18 discontinued. (Please see Revision Guide for details.) Revision numbers added and previous revision notes removed. Secondary record column deleted. (Secondary records are covered by CORE DAN GS50-02-04.) |
| 8.0 | November 29, 2012 | Major revision. Health Services section updated. Reformatted entire schedule. 13 new series added; 15 modified for state audit requirements. Archival designations changed. Removed series covered by *CORE*. (All changes are detailed in the Revision Guide.) |
| 8.1 | September 25, 2014 | **Student** **Assessment** updated, including mandatory state and optional school/district testing. **Student** **Assignment** updated, including special programs as defined by statute (highly capable, transitional bilingual, etc.). New series added to cover **certificated years of experience**, investigations of **employee sexual misconduct,** investigations of **employee physical/verbal abuse,** and **bus light/sign failure to stop violation** records. Total of 9 new series added; 20 modified for accuracy, clarity and end-user ease. Removed 1 series covered by *CORE*. (All changes are detailed in the Summary of Changes.) |
| 8.2 | December 18, 2014 | Retention and disposition action modified in SD2014-020 (**employee sexual misconduct)** and **SD2014-021 (employee physical/verbal abuse)** to specify that in the event the accused dies before reaching age 80, the associated records need to be retained for a total of 30 years or 10 years (respectively) after date of the *most recent accusation and completion of investigation* (if any). (All changes are detailed in the Summary of Changes.) |
| 8.3 | June 3, 2020 | Scope of schedule broadened to include all public (K-12) schools (including charter schools and those operated by state agencies such as the Military Department’s Youth Academy, Washington State School for the Blind, and Washington School for the Deaf). Minor revisions throughout the schedule, especially with student discipline and transportation. |
| 8.4 | April 7, 2021 | Minor revisions to the “Student Learning – Student Achievement Testing (Standardized)” and “Student Learning – Teaching Records” sections.  |

For assistance and advice in applying this records retention schedule,

please contact your agency’s Records Officer

or Washington State Archives at:

recordsmanagement@sos.wa.gov

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1. AGENCY MANAGEMENT

This section covers records relating to agency management that are not covered by the *Local Government Common Records Retention Schedule (CORE) / State Government General Records Retention Schedule (SGGRRS).*

| * 1. COMMUNITY RELATIONS

The activity of the agency’s interaction with its community. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-01-52Rev. 2 | ***Historical Records, Materials and Artifacts from Commemorative Events and Displays***Records documenting significant events or milestones of individual schools, school districts, and educational service districts, where these events are not documented in other records (such as board minutes, student transcripts, etc.) Includes, but is not limited to:* Award lists;
* Baccalaureate and commencement programs;
* Cumulative class rankings;
* Diploma order lists;
* Exhibits;
* Final grade point summaries;
* Honor Roll lists;
* Graduating class history files;
* Student newspapers, yearbooks/annuals.

Excludes records covered by:* *Graduate List (DAN SD51-20-10)*;
* *Interscholastic Activities – Achievements (DAN SD51-20-02)*.

*Note: Other historical materials and artifacts (non-records) should also be retained by the school for commemorative events and displays (school reunions, centennials, etc.) or made available to local heritage organizations. Items may include banners, posters, trophies, uniforms, etc.* | **Retain** until no longer needed for agency business *then***Transfer** to Washington State Archives for appraisal and selective retention. | **ARCHIVAL****(Appraisal Required)** NON-ESSENTIALOPR |
| SD51-20-08Rev. 1 | ***Photo/Media Release – External Usage***Records documenting permission for non-school/district entities (such as television/radio stations, newspapers, school photographers, etc.) to use student images. Student images include, but are not limited to, photos, video, and audio recordings.  | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-20-09Rev. 1 | ***Photo/Media Release – School/District Usage***Records documenting permission for the school/district to use student images recorded during official school activities/events, by staff or students in an official capacity (e.g., school newspaper, annual staff, etc.). Includes annual student identification/class pictures taken by school-contracted photographer. Student images include, but are not limited to, photos, video, and audio recordings. | **Retain** for 6 years after image/ recording no longer being used *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2012-062Rev. 0 | ***Photo/Media Release – Denial of Permission***Records documenting parent/legal guardian denial of permission for the school/district to use student images recorded during official school activities/events. Includes opting-out. | **Retain** until end of school year or until superseded, *whichever is later* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-01-35Rev. 2 | ***Public Research Access Requests***Records relating to requests for access to school/district records for research purposes.Includes, but is not limited to:* Research activity records/logs;
* Correspondence/communications with the requester;
* Other internal and external correspondence/communications related to the query.

Excludes records covered by:* *Authorization For/Release of Student Records – Prior Consent Not Required (DAN SD51-05F-02);*
* *Authorization For/Release of Student Records – Prior Consent or Documentation Required (DAN SD2012-068);*
* *Public Disclosure/Records Requests (DAN GS2010-014 / GS 05001).*
 | **Retain** for 3 years after resolution of request  *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2020-007Rev. 0 | ***Video Consent Form for Teacher Candidate Exam Video Submission*** Records documenting the affirmation or denial of consent for students to be filmed as part of the requirements for an Educative Teacher Performance Assessment (edTPA) Teacher Candidate’s certification.*Note: The Professional Educator Standards Board and the Office of Superintendent of Public Instruction require these records to be retained by the school/district or the Teacher Candidate’s certification program.* | **Retain** for6years after destruction of video *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. PLANNING, MISSION, AND CHARTER

The activity of documenting and determining the agency’s objectives, and the means for obtaining them. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-07-08Rev. 1 | ***Demographic and Enrollment Projections*** | **Retain** for 3 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2011-153Rev. 1 | ***School Safety Plans***Records relating to the agency’s plans for ensuring student and staff safety at school.Includes, but is not limited to:* Safe school plans prepared in accordance with RCW 28A.320.125;
* Harassment, intimidation and bullying prevention plans prepared and maintained in accordance with RCW 28A.600.477.
 | **Retain** for 6 years after obsolete or superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. REPORTING

The activity of providing information as required by regulating authorities. Also includes voluntary reporting. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-12-05Rev. 2 | ***Healthy Youth Survey Results***School/district results of the (voluntary) Healthy Child Student Survey sponsored by the Office of Superintendent of Public Instruction, the Departments of Health, Social and Health Services, and Commerce, and the Family Policy Council.*Note: Statewide survey results are designated as Archival in accordance with the Office of Superintendent of Public Instruction’s records retention schedule.* | **Retain** for 6 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-03C-17Rev. 2 | ***Impact Aid Programs – Child Not Eligible***Federal impact aid surveys completed by parents/legal guardians in accordance with 34 CFR §222.35, where the children are determined to be not eligible.Excludes surveys documenting children who are eligible for federal impact aid, covered by:* *Financial Transactions – Bond, Grant and Levy Projects (DAN GS2011-183)*;
* *Grants Received by Agency (DAN GS 23004)*.
 | **Retain** until submittal of the application for federal impact aid *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-01-37Rev. 3 | ***Reporting – Office of Superintendent of Public Instruction (OSPI) – General***Records relating to reports required to be submitted to the Office of Superintendent of Public Instruction (OSPI) in accordance with Title 28A RCW and Title 392 WAC, where not covered by a more specific records series. Includes reports, supporting documentation, confirmation of submission, correspondence, inquiries, revisions, corrections, etc.Includes, but is not limited to:* Alternative Learning Experience (ALE) enrollment (WAC 392-121-182);
* Apportionment, enrollment count, P-223, attendance/absence report, etc.;
* Essential Academic Learning Requirements (EALR) implementation verification reports (RCW 28A.230.095);
* Ethnicity and race data (RCW 28A.300.505);
* Graduation and dropout data;
* School safety plan summary (RCW 28A.600.477);
* Truancy report;
* Weapons and student behavior data.

Excludes records covered by: * *School Safety Plans (DAN SD2011-153)*;
* *Student Transportation Report Records (DAN SD51-05G-07)*;
* *Reporting/Filing (Mandatory) – Agency Management (DAN GS2012-028)*;
* *Reporting to External Agencies (Mandatory) (DAN GS 19004)*.
 | **Retain** for 4 years after submission of report *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2012-063Rev. 1 | ***Reporting – Student Health and Safety***Records relating to student health and safety submitted to the regulatory agencies as required by federal, state, or local law, or by school/district policy, where not covered by a more specific records series. Includes, but is not limited to: * Reports of suspected cases, outbreaks, and suspected outbreaks of communicable diseases to the local health department in accordance with WAC 246-101-420;
* Annual immunization status report submitted to the Department of Health in accordance with RCW 28A.210.110(3);
* Data collected from schools and summary reports that detect, prevent and control communicable diseases;
* Correspondence, such as confirmation of submission, inquiries, etc.;
* Records documenting revisions/corrections.

*Note: Health Departments/Districts and Department of Health retain the reports in accordance with their retention schedules.* | **Retain** for 4 years after submission of report *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-09-03Rev. 2 | ***Reporting – Suspected Child Abuse***Records relating to suspected child abuse as reported to the Department of Children, Youth, and Families (DCYF) Child Protective Services (CPS), or to the proper law enforcement agency in accordance with RCW 26.44.030. Reports are compiled by agency personnel regarding students who indicate they may be victims of abuse, and are reported within 24 hours to CPS for investigating. Includes, but is not limited to:* Communications regarding abuse;
* Records documenting conversations with students;
* Reports to CPS;
* Correspondence, such as confirmation of submission, inquiries, etc.;
* Records documenting revisions/corrections.
 | **Retain** for 6 years after submission of report *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. SUPERINTENDENT

See CORE – Agency Management for additional executive records relating to the management and day-to-day operations of the district. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2020-001Rev. 0 | ***Accreditation (Applications/Maintenance)***Records related to the compiling and submission of statistical, descriptive, and evaluative materials in applying for or subsequent maintenance of accreditation for a school by a professional association that sets the standards for that particular discipline (Northwest Accreditation Commission (NWAC), Educational Service Districts (ESDs), or other accrediting bodies recognized by the United States Department of Education). Includes, but is not limited to:* Self-evaluation of the School Improvement Plan (SIP) and/or SIP planning process;
* Evaluation conducted by accrediting body.

Excludes records covered by: * *Basic Education Act Compliance (DAN SD51-05-10)*;
* *Accreditation (Outcome) (DAN SD51-05-11)*.
 | **Retain** for 6 years after end of accreditation/denial *or* until superseded by new accreditation *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05-11Rev. 2 | ***Accreditation (Outcome)***Records documenting the granting/loss of accreditation for a school by a professional association that sets the standards for that particular discipline (e.g., Northwest Accreditation Commission (NWAC), Educational Service Districts (ESDs), or other accrediting bodies recognized by the United States Department of Education). Accreditation is a voluntary process for granting public recognition to institutions that meet external standards of quality.Includes, but is not limited to:* Certificate of accreditation.

Excludes records covered by: * *Basic Education Act Compliance (DAN SD51-05-10)*;
* *Accreditation (Applications/Maintenance) (DAN SD2020-001)*.
 | **Retain** for 6 years after end of accreditation *or* until superseded by new accreditation *then***Transfer** to Washington State Archives for permanent retention. | **ARCHIVAL****(Permanent Retention)**NON-ESSENTIALOPR |
| SD51-05-10Rev. 1 | ***Basic Education Act Compliance***Records relating to annual review of the district’s K-12 programs – and reporting to the Washington State Board of Education – to confirm compliance (or non-compliance) with the minimum requirements of the Basic Education Act in accordance with WAC 180-16-195. Includes waiver requests and results. *Note: This record is retained by the Office of Superintendent of Public Instruction for 25 years in accordance with its records retention schedule.* | **Retain** for 6 years after end of calendar year *then***Transfer** to Washington State Archives for permanent retention. | **ARCHIVAL****(Permanent Retention)** NON-ESSENTIALOPR |
| SD51-05-06Rev. 1 | ***Official District Negotiated School Calendars*** | **Retain** for 6 years after end of calendar year *then***Transfer** to Washington State Archives for permanent retention. | **ARCHIVAL****(Permanent Retention)**NON-ESSENTIALOPR |
| SD51-05-13Rev. 3 | ***Superintendent of Schools (General)***Records documenting the official duties and actions of the school/district’s Superintendent of Schools pursuant to RCW 28A.400.030, where not covered by a more specific records series.Includes, but is not limited to:* Official statement of graduating class.

Excludes records covered by:* *Meetings – Governing/Executive (DAN GS50-05A-13)*;
* *Governing/Executive/Policy-Setting Body Records (DAN GS 10004)*.
 | **Retain** for 6 years after end of calendar year *then***Transfer** to Washington State Archives for appraisal and selective retention. | **ARCHIVAL****(Appraisal Required)**NON-ESSENTIALOPR |

| * 1. TRAINING

The activity of the agency providing training to agency employees, contractors, customers, or the public. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-04G-01Rev. 2 | ***Agency-Provided Training – In-Service Education Programs***Records documenting approved in-service education programs provided by the local government agency to the public, customers, contractors, or agency employees, where continuing education credits/clock hours are awarded in accordance with WAC 181-85-205. Includes, but is not limited to:* Curricula, materials presented, tests administered, etc.;
* Attendee lists and sign-in sheets, test results, evaluations, etc.;
* Certification/hours/credits/points awarded;
* All other records required by WAC 181-85-205.

*Note: Retention based on 7-year requirement for in-service education records (WAC 181-85-205).* | **Retain** for 7 years after in-service program completed *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

1. EDUCATIONAL SERVICE DISTRICTS

| * 1. LEARNING RESOURCE CENTER

Reference chapter 28A.310 RCW. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-13-03Rev. 0 | ***Learning Resource Center (LRC) Selection Advisory Committee Purchase Recommendations (Voting Tabulation)***  | **Retain** for 3 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-13-04Rev. 0 | ***Teacher Evaluation Forms of Learning Resource Center (LRC) Collections***Includes files, etc. | **Retain** for 3 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. TEACHER CERTIFICATION

Reference chapter 28A.410 RCW. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-14-02Rev. 0 | ***Certificate Information Summary***Computed data. | **Retain** for 6 years after end of fiscal year *then*Destroy. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-14-04Rev. 0 | ***Professional Education Permits – Temporary*** | **Retain** for 6 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

1. FINANCIAL MANAGEMENT

This section covers records relating to financial management which are not covered by the *Local Government Common Records Retention Schedule (CORE) / State Government General Records Retention Schedule.*

| * 1. BUDGET

The activity of determining estimates of the agency’s future revenue and expenditures. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-02-03Rev. 1 | ***Apportionment Report from OSPI***Apportionment report received from the Office of Superintendent of Public Instruction (OSPI) informing the district of its funding allocation. *Note: OSPI’s copies of these reports are designated Archival in accordance with its records retention schedule.* | **Retain** for 4 years after date of report *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-02A-04Rev. 1 | ***Budget Revision Requests***Formal requests to revise a budget that has already been adopted. | **Retain** for 6 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

1. HUMAN RESOURCE MANAGEMENT

This section covers records relating to human resource management ***where not covered by*** the *Local Government Common Records Retention Schedule (CORE) / State Government General Records Retention Schedule.*

| * 1. MISCONDUCT/DISCIPLINE/GRIEVANCE

The activity of investigating and responding to employee misconduct, grievances, and disciplinary matters. |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2014-020Rev. 1 | ***Employee Sexual Misconduct Accusations/Investigations – Sustained and Unfounded***Records relating to investigations of sexual misconduct as defined by WAC 181-88-060 (allegedly) committed by an employee as defined by WAC 181-88-020. Also includes investigations of sexual misconduct accusations where the employee retains employment with the district, and/or investigations of sexual misconduct where there is not sufficient information to conclude that the misconduct occurred, and/or accusations of sexual misconduct where the school/district decides not to proceed with an investigation.Includes, but is not limited to:* Accusation(s) and decision(s) not to investigate;
* Complaint initiating the investigation; investigative reports, statements, taped information, corrective action, correspondence and notes;
* Investigative summary report;
* Rebuttal documents (RCW 28A.400.301(12));
* Correspondence and reports to/from OSPI.

*Reference: Limitation of actions RCW 9A.04.080(1)(c).**Note: (Some of) these records may be exempt from public disclosure. RCW 42.56.230(3). For guidance on the disclosure of these records, please consult your agency attorney.* | **Retain** until subject of allegation(s) reaches age 80 *or*If subject of allegation(s) dies prior to reaching age 80, retain for 30 years after date of most recent accusation & completion of investigation/decision not to investigate  *or* 30 years after date of separation from employment, *whichever is earlier* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2014-021Rev. 1 | ***Employee Verbal Abuse/Physical Abuse Accusations/Investigations – Sustained and Unfounded***Records relating to investigation of verbal abuse or physical abuse as defined by chapter 181-88 WAC, (allegedly) committed by an employee as defined by WAC 181-88-020. Also includes investigations of verbal or physical abuse accusations where the employee retains employment with the district and/or investigations of verbal or physical abuse accusations where there is not sufficient information to conclude that the abuse occurred, and/or accusations of verbal or physical abuse where the school/district decides not to proceed with an investigation.Includes, but is not limited to:* Accusation(s) and decision(s) not to investigate;
* Complaint initiating the investigation, investigative reports, statements, taped information, corrective action, correspondence and notes;
* Investigative summary report;
* Rebuttal documents (RCW 28A.400.301(12));
* Correspondence and reports to/from OSPI.

*Reference: Limitation of actions RCW 9A.04.080(1)(b).**Note: (Some of) these records may be exempt from public disclosure. RCW 42.56.230(3). For guidance on the disclosure of these records, please consult your agency attorney.* | **Retain** until subject of allegation(s) reaches age 80 *or*If subject of allegation(s) dies prior to reaching age 80, retain for 10 years after date of most recent accusation & completion of investigation/decision not to investigate  *or* 10 years after date of separation from employment, *whichever is earlier* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. PERSONNEL

The activity of documenting an individual’s employment with the agency. Includes volunteers. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2014-022Rev. 1 | ***Certificated Years of Experience***Records documenting certificated employee work experience as defined by WAC 392-121-264, which is used for future salary computation verification purposes pursuant to WAC 392-121-280.Excludes records covered by:* *Employee Retirement/Pension Verification (DAN GS2017-009)*;
* *Retirement Verification (DAN GS 03032)*.

*Note: Retention based on consistency with OSPI’s retention requirements.* | **Retain** for 60 years after expiration or renewal of certification   *then***Destroy**. | NON-ARCHIVAL**ESSENTIAL****(for Disaster Recovery)**OPR |
| SD51-01-46Rev. 1 | ***Signature of Receipt Record***Receipts or lists signed by employees to verify receipt of instructions, or documents such as paychecks, leave/ benefit reports, retirement system accounting statements, etc. | **Retain** for 1 year after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |

| * 1. STAFF DEVELOPMENT

The activity of enhancing employees’ competencies and skills through programs and training. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-04G-03Rev. 2 | ***List of HIV/AIDS and Hepatitis B Virus (HBV) Trained Employees***List of public school employees who have been educated about the transmission, prevention, and treatment of HIV/AIDS pursuant to RCW 70.24.290 & chapter 392-198 WAC, and other blood-borne pathogens pursuant to Washington Industrial Safety and Health Act (WISHA) standards pursuant to chapter 49.17 RCW and chapter 296-823 WAC. Excludes individual employee training records covered by:* *Employee Work History (DAN GS50-04B-06)*;
* *Personnel – Employment Work History Files (DAN GS03042)*.

*Note: Retention based on 30-year requirement for employee exposure records (WAC 296-802-20010).* | **Retain** for 30 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

1. STUDENT LEARNING

| * 1. CURRICULUM

The activity of the school/district defining, describing, and providing to students instructional programs, content, materials, and resources. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-06A-02Rev. 3 | ***Administration of Federal and State Categorical Grant Programs***Records relating to the administration of federal and state categorical grant-funded programs. Records may include, but are not limited to:* District- or school-wide notifications/information distributed to parents/legal guardians/students about educational opportunities and services;
* Student information (names/eligibility lists, copies of test scores, etc.);
* Staff information (copies of employment applications, payroll/stubs, etc.);
* Budget, inventory of equipment, legal reports, pre- and post-test data, comparability reports, evaluations;
* Promotion of parent/family involvement (Title I parent advisory councils, coordination with other school-based programs and services, etc.).

*Note: Some records covered by this series (e.g., individual student records, employment applications and payroll, etc.) are also covered more specifically elsewhere. Records that serve multiple purposes must be retained for the longest of the applicable minimum retention periods.* | **Retain** until completion of State Auditor’s examination report *and*retain for period required by grant or program *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-06A-04Rev. 1 | ***Course Additions, Deletions, and Changes*** | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06A-19Rev. 1 | ***Course Description Catalog***A publication for parents/guardians and students containing a comprehensive list and description of grade level courses offered annually. May include prerequisites, electives, and other curriculum based information.  | **Retain** until superseded *then***Transfer** to Washington State Archives for permanent retention. | **ARCHIVAL****(Permanent Retention)**NON-ESSENTIALOPR |
| SD51-06A-11Rev. 3 | ***Curriculum Requests/Waivers/Substitutions***Records relating to student requests for classes or waivers/substitutions, where authorizing signature/initials from school district staff is required (principal, teacher, counselor, etc.). Includes, but is not limited to:* Requests for curriculum requirement waivers;
* Requests to take classes outside of the school/district;
* Denial/approval of request;
* Communications to and from parent/legal guardian.

Examples of waivers include, but are not limited to:* Physical education waivers for health reasons;
* HIV/AIDS or sex education waivers (RCW 28A.230.070(4) or RCW 28A.300.475(6));
* Washington state history or math waivers (chapter 180-51 WAC).

Excludes:* Student “surveys” used to plan staffing and course offering, that do NOT require authorizing signature, covered by *Organizing/Monitoring Work in Progress (DAN GS2016-008 / GS 50011)*;
* State assessment waivers covered by *Standardized Achievement Tests – Communications and Requests (DAN SD2014-025)*.
 | **Retain** for 5 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-06A-05Rev. 2 | ***Curriculum Summaries and Guides***Records relating to publications created by the school or district which support the information provided in the Course Description Catalog. Records reflect statewide curriculum requirements and guidelines, showing what is to be taught, how it will be taught, and how students’ performance will be evaluated. Includes records that reflect the following:* Concepts to be taught;
* Methods of instruction used;
* Student performance objectives and evaluation criteria used;
* Activities that will enable students to accomplish objectives.

Excludes records covered by *Course Description Catalog (DAN SD51-06A-19)*. | **Retain** until superseded  *then***Destroy.**  | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06A-06Rev. 2 | ***Essential Academic Learning Requirements (EALR) – Program Files***1. A complete set of student learning objectives for each core subject.2. Community input data for development of EALR student learning objectives.3. Evaluation data for each EALR. Excludes information verification reports covered by *Reporting – Office of Superintendent of Public Instruction (OSPI) – General (DAN SD51-01-37)*.  | **Retain** until superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06A-07Rev. 1 | ***Essential Academic Learning Requirements (EALR) – Program Results*** | **Retain** until test data compiled and issued *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06A-09Rev. 1 | ***Essential Academic Learning Requirements (EALR) – Individual Reports*** | **Retain** until test data compiled and issued *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06A-08Rev. 2 | ***Graduation Requirements***Statement of courses and credits required for graduation that is approved by the school/ district’s governing body. Includes locally adopted high school graduation requirements (and procedures for equivalencies) for career and technical high school courses offered in high schools and skills centers in accordance with RCW 28A.230.097, and alternative high school graduation requirements adopted in accordance with WAC 180-18-055. | **Retain** until no longer needed for agency business *then***Transfer** to Washington State Archives for permanent retention. | **ARCHIVAL****(Permanent Retention)**NON-ESSENTIALOPR |
| SD51-06A-10Rev. 3 | ***Instructional Materials Subject File***Evaluation data and recommendations on instructional materials that are accrued prior to Board adoption, where not included in advisory board agenda packets. Excludes records covered by:* *Meetings – Advisory (DAN GS2012-027)*;
* *Advisory Body Records (DAN GS 10015)*.
 | **Retain** for 4 years after end of fiscal year  *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Transfer** to Washington State Archives for appraisal and selective retention. | **ARCHIVAL****(Appraisal Required)**NON-ESSENTIALOFM |
| SD51-06A-12Rev. 0 | ***Parent/Legal Guardian Permission Slips for Internet Access and Film Viewing*** | **Retain** until end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-20-03Rev. 1 | ***School Master Schedule***Class schedule unique to each school. | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-01-49Rev. 0 | ***Statement of Requirements and Expectations Signed and Returned by Parent/Legal Guardian*** | **Retain** until end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |

| * 1. HOME-BASED INSTRUCTION

Reference chapter 28A.200 RCW. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-09A-01Rev. 1 | ***List of Services Provided by the School District*** | **Retain** until no longer needed for agency purposes *then***Transfer** to Washington State Archives for appraisal and selective retention. | **ARCHIVAL****(Appraisal Required)**NON-ESSENTIALOPR |
| SD51-09A-02Rev. 1 | ***List of Students Participating in Home-Based Instruction***  | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-09A-05Rev. 1 | ***Parent/Legal Guardian Declaration of Intent***Annual statement of intent by parent/ legal guardian to provide full-time or part-time home-schooling for an individual student. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-09A-03Rev. 2 | ***Transfer of Home-Based Student to School/District***Records relating to the transfer of home-based student to school/district, including placement/evaluation test results, notice of transfer, etc. | **Retain** for 3 years after student graduates or withdraws from district *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |

| * 1. SKILLS CENTER
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-10-02Rev. 2 | ***Skills Center Patient Case Files***Records of health care/treatment given to patients provided as part of an instruction program through a skills center.*Note: Retention based on 8-year statute of limitations for the commencement of actions for injuries resulting from health care or related services (RCW 4.16.350).* | **Retain** for 8 years after last provision of health-related services *then***Destroy**. | NON-ARCHIVAL**ESSENTIAL****(for Disaster Recovery)**OPR |
| SD51-10-03Rev. 2 | ***Skills Center Student Time Log/Sheet***Log/sheet recording a student’s presence/absence in a skills center course. | **Retain** for 5 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. SPECIAL EDUCATION PROGRAM

The activity of providing a free and appropriate education to children with disabling conditions pursuant to chapter 28A.155 RCW & chapter 392-172A WAC. Excludes records relating to Rehabilitation Act of 1973 Section 504 accommodations, which are covered in CORE – Legal Affairs. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-05I-02Rev. 3 | ***Special Education Program – Student History File***Records relating to an individual student’s eligibility and enrollment in a Special Education program.Includes, but is not limited to:* Psychological and IQ test results;
* Eligibility decision documentation, evaluation and other reports;
* Individualized Education Programs (IEPs);
* Related correspondence/communication.

Excludes records covered by:* *Official Student Record (DAN SD51-05F-10)*;
* *Special Education Program – Student History File Retention/Disposition Notification (DAN SD51-05I-03)*.

*Note: “Each school district shall inform parents and adult students when personally identifiable information collected, maintained, or used in compliance with this chapter is no longer needed to provide educational services to the student, or is no longer required to be retained under state or federal law.” (WAC 392-172A-05235)* | **Inform** parent/adult student pursuant to WAC 392-172A-05235 *and***Retain** for 6 years after separation from program  *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05I-03Rev. 3 | ***Special Education Program – Student History File Retention/Disposition Notification***Records relating to informing parents/adult student that personally identifiable information contained in the Special Education Student History File is no longer needed to provide educational services to the child in accordance with WAC 392-172A-05235.  | **Retain** for 6 years after parent/adult student informed in accordance with WAC 392-172A-05235 *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05I-04Rev. 2 | ***Special Education Program – Student Not Eligible***Referrals, evaluations, evaluation reports, and notices for students determined not to be eligible for the special education program*.* | **Retain** for 5 years after student determined to be ineligible *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |

| * 1. STUDENT ACHIEVEMENT TESTING (STANDARDIZED)

The activity of measuring student knowledge/achievement through mandatory, standardized student assessments/tests as required by federal or state statute and/or the Office of the Superintendent of Public Instruction (OSPI). Excludes optional school/district assessments, optional 3rd party/vendor testing results, and tests included in classroom grade documentation. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2014-025Rev. 1 | ***Standardized Achievement Tests – Communications and Requests***Records relating to informing parents/legal guardians about mandatory state assessments, and processing requests for waiver/substitution made on behalf of individual students. Includes, but is not limited to:* District- or school-wide notifications/information distributed to parents/legal guardians/students about mandatory state testing;
* Communications to and from individual parents/legal guardians regarding testing waivers, substitutions, etc.;
* Records relating to approval/denial of request, etc.

Excludes individual student test results covered by *Standardized Achievement Test Results – Individual Student (DAN SD51-06A-17)*. | **Retain** for 5 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-06A-16Rev. 2 | ***Standardized Achievement Test Results – Group Reports***Summary of standardized achievement tests required by federal or state statute and/or the Office of Superintendent of Public Instruction (OSPI). May include scores by class, grade, program, sex, ethnic group, building, district, etc. *Note: OSPI’s record of standardized test results is designated Archival for OSPI and must be retained by OSPI until transferred to Washington State Archives for permanent retention.* | **Retain** for 5 years after date of report *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06A-17Rev. 3 | ***Standardized Achievement Test Results – Individual Student***Individual student results of standardized achievement tests required by federal or state statute and/or the Office of Superintendent of Public Instruction (OSPI).Excludes optional school/district assessments covered by *Student Assessments (School/District Optional) – Testing and Results (DAN SD2014-024)*.*Note: OSPI’s record of standardized test results is designated Archival for OSPI and must be retained by OSPI until transferred to Washington State Archives for permanent retention.* | **Retain** for 3 years after student graduates or withdraws from district *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06A-18Rev. 4 | ***Standardized Achievement Testing (Mandatory)***Records documenting standardized achievement testing required by federal or state statute and/or the Office of Superintendent of Public Instruction (OSPI), where OSPI is the custodian of the student responses and test results. Includes contractors.Records include, but are not limited to:* Test booklet assignment lists, sign-in sheets/rosters, proctoring records, etc.;
* All test questions and all answers regardless of format (paper or electronic), including test booklets, answer/bubble sheets, etc.;
* Correspondence with OSPI (testing irregularities, modified testing schedules, medical exemptions, damaged/missing numbered booklets, proof of return of test materials, etc.).

Tests/testing materials may include, but are not limited to:* Measurements of Student Progress (MSP); Smarter Balanced Tests (English Language Arts, Math, etc.);
* High School Proficiency Exam (HSPE), HSPE-Basic, Developmentally Appropriate Proficiency Exam (DAPE);
* End of Course Exams (EOC Algebra, EOC Geometry, EOC Biology, etc.).

Excludes English language proficiency assessments conducted pursuant to chapter 28A.180 RCW and covered by *Student Assignment – Special Service Programs (Transitional Bilingual Instruction) (DAN SD2014-027)*.*Reference Washington State Assessment Coordinators Manual on OSPI’s website.* | **Retain** until completion of testing *then***Return** secure test materials *and* **Destroy** non-secure test materials as directed by OSPI in the current Washington State Assessment Coordinators Manual. | NON-ARCHIVALNON-ESSENTIALOFM |

| * 1. TEACHING RECORDS

The activity of teachers documenting their teaching plans and the performance of their students.  |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2012-074Rev. 2 | ***Alternative Learning Experience (ALE)***Records documenting student participation in an alternative learning experience program pursuant to WAC 392-121-182. Includes, but is not limited to:* Letter of attestation/statement of understanding;
* District release form and/or shared agreement (if sharing student);
* Written student learning plan (start/stop dates; approval date when district/teacher approves plan; estimated hours per week of student participation in ALE; instructional materials needed; timelines and methods for evaluating student progress; specific learning goals/objectives/requirements; HQT (highly qualified teacher) for each course; whether ALE meets the state’s learning requirements, etc.);
* Student/teacher instructional two-way interactions/contacts;
* Monthly progress evaluations and weekly communications with student (and parent/legal guardian for student grades K-8), including dates when occurred.

Excludes attendance records covered by *Attendance (DAN SD51-04-05)*.*Note: Please consult WAC 392-121-182 for additional ALE recordkeeping requirements.* | **Retain** for 5 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-06E-01Rev. 1 | ***Grade Documentation – Elementary***To provide documentation for grades. | **Retain** for 1 year after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-06E-02Rev. 2 | ***Grade Documentation – Secondary***To provide documentation for grade and credit record challenges. Includes records that document state graduation requirements, such as culminating projects, senior projects, etc. | **Retain** for 5 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-09-01Rev. 1 | ***Home/Hospital Tutoring***Records relating to the provision of home/hospital instruction to students who are temporarily unable to attend school for four weeks or more because of a physical and/or mental disability or illness, in accordance with WAC 392-172A-02100. | **Retain** for 6 years after application received or services provided, *whichever is later* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-06E-03Rev. 2 | ***Lesson Plans and Other Teaching Materials***Records relating to the planning of lessons and teaching materials created/used to facilitate learning (including online learning).Includes, but is not limited to:* Lesson plans;
* Recorded lessons;
* Website records created to facilitate learning.
 | **Retain** for 1 year after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2020-003Rev. 0 | ***Papers, Projects, and Other Assignments Submitted by Students – Not Retrieved***Materials submitted by students in fulfillment of requirements, where the student has not retrieved the materials. Includes, but is not limited to: * Papers, projects, and other assignments (regardless of format);
* Student responses to exams/tests.
 | **Retain** until end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2014-023Rev. 1 | ***Student Assessments (School/District Optional) – Test Selection***Records relating to the selection of optional student assessments/tests administered by the school/district (including contractors) to evaluate student or classroom needs, instructional strategies, etc., where the test: * Is not required by federal or state statute and/or the Office of Superintendent of Public Instruction (OSPI) and is not tied to funding;
* Is not required for high school graduation and is not tied to grade progression;
* Results are not required to be submitted to OSPI.

Excludes testing administration and results covered by *Student Assessments (School/District Optional) – Testing and Results (DAN SD2014-024).* | **Retain** for 3 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2014-024Rev. 2 | ***Student Assessments (School/District Optional) – Testing and Results***Records relating to optional student assessments/tests administered by the school/district (including contractors) to evaluate student or classroom needs, instructional strategies, etc., where the test: * Is not required by federal or state statute and/or OSPI and is not tied to funding;
* Is not required for high school graduation and is not tied to grade progression;
* Results are not required to be submitted to OSPI.

Includes, but is not limited to:* Test assignment lists, sign-in sheets/rosters, scoring booklets/worksheets;
* Test data, results and reports;
* Measures of Academic Progress (MAP), Dynamic Indicators of Basic Early Literacy Skills (DIBELS), etc.;
* Records documenting online or in-person proctoring (monitoring).

Excludes:* Mandatory testing covered in the Student Achievement Testing (Standardized) section;
* Test results included in classroom grade documentation covered by *Grade Documentation – Elementary (DAN SD51-06E-01)* and *Grade Documentation – Secondary (DAN SD51-06E-02)*;
* Vendor/3rd party testing results (SAT, ACT, AP, IB) retained in *Student Cumulative Folder (Student File Folder) (DAN SD51-05F-07)*;
* Test selection records covered by *Student Assessments (School/District Optional) – Test Selection (DAN SD2014-023)*.
 | **Retain** for 1 year after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

1. STUDENT ADMINISTRATION

| * 1. STUDENT ASSIGNMENT

The activity of determining student eligibility to attend school within the district’s boundaries, assigning individual students to the appropriate school and grade level, and ensuring that legalities have been met (age, immunizations, etc.). Includes placement of qualifying students into specialized/alternative schools, programs, classes, and activities. Excludes Special Education records. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2012-064Rev. 1 | ***Homeless Child and Youth Identification/Eligibility Determination***Records relating to identifying students who lack fixed, regular and adequate nighttime residences, and determining services necessary to ensure their educational success in grades PreK-12, pursuant to the McKinney-Vento Homeless Education Assistance Improvements Act of 2001. Includes, but is not limited to:* Screening/interview/intake forms and checklists (eligible and ineligible);
* Information provided to parents/legal guardians about educational and related opportunities available to their children;
* Outreach efforts conducted by the district homeless liaison and other district staff (notices posted at shelters, etc.);
* Coordination with other entities and agencies.

Excludes records covered by: * *Official Agency Policy and Procedure Directives, Regulations and Rules (DAN GS50-01-24)*;
* *Policies and Procedures – Agency Core Mission (DAN GS 10002)*.
 | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-09-02Rev. 2 | ***Immunization Status***Records documenting a student’s immunization status, including proof of immunization pursuant to RCW 28A.210.080, or certification of exemption pursuant to RCW 28A.210.090. Includes Department of Health Certificate of Immunization Status form #348-013. | **Retain** until student graduates or withdraws *then***Return** to parent/legal guardian or emancipated student *or***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2012-065Rev. 1 | ***Immunization/Exemption Reporting Compliance***Records documenting the school/district’s efforts to achieve student compliance with immunization requirements pursuant to RCW 28A.210.080 and chapter 246-105 WAC. Includes, but is not limited to:* Steps taken to bring students into compliance;
* Correspondence to and from parent/legal guardian(s).

Excludes immunization status reports covered by *Immunization Status (DAN SD51-09-02).* | **Retain** until compliance is achieved or student withdraws/graduates, *whichever is sooner* then**Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2012-066Rev. 2 | ***Immunization-Related Exclusions***Records relating to the exclusion of students from school due to failure to provide proof of immunization or certification of exemption pursuant to RCW 28A.210.120, WAC 246-105-080, and/or chapter 392-380 WAC. Includes exclusions due to communicable disease outbreaks pursuant to chapter 246-110 WAC.Excludes immunization status reports covered by *Immunization Status (DAN SD51-09-02).* | **Retain** for 3 years after date student excluded from school *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05J-06Rev. 3 | ***Student Assignment – General***Records relating to the assignment of a specific student to a district, school or program where a placement process exists (such as lottery, teacher nomination, etc.). Programs may include, but are not limited to:* Alternative education/learning programs (online programs, math/art/science/music academies, etc.);
* Early entrance (WAC 392-335-025) , full-day kindergarten, Montessori, etc.;
* International Baccalaureate (IB), Advanced Placement (AP);
* “College in school” classes (where not associated with Running Start).

Records include, but are not limited to:* Nominations, observations, recommendations;
* Screening/interview/intake forms and checklists (eligible and ineligible);
* Testing results;
* Communications with parents/legal guardians;
* Appeals.

Excludes:* Special education programs regulated by chapter 28A.155 RCW;
* Categorical/special service programs covered by SD51-06A-13, SD2014-027, and/or SD2014-026;
* Alternative Learning Experience (ALE) programs covered by SD20122-074;
* Home-based instruction covered by SD51-09A-01, -02, -03, and -05;
* Student transfers covered by SD51-05J-02, SD2012-067 and SD51-09A-03.
 | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-06A-13Rev. 2 | ***Student Assignment – Special Service Programs (Student Not Placed)***Records relating to student qualification for or placement in special service schools, programs, classes and activities offered by the district (including contractors) that are regulated by specific statute and where the student is denied placement or where the student/parent/legal guardian declines placement. See exclusions, below. Programs/classes may include, but are not limited to:* Highly capable/gifted/talented (chapter 392-170 WAC);
* Learning Assistance Program (LAP) (chapter 392-162 WAC);
* Indian Education Programs (Title VII);
* Running Start Program (chapter 392-169 WAC);
* Dropout Reengagement Program (chapter 392-700 WAC).

Records include, but are not limited to:* Nominations, observations, recommendations;
* Screening/interview/intake forms and checklists;
* Testing results;
* Communications with parents/legal guardians;
* Appeals.

Excludes records covered by: * Special education programs regulated by chapter 28A.155 RCW;
* Transitional bilingual instruction programs regulated by chapter 28A.180 RCW;
* *Homeless Child and Youth Identification/Eligibility Determination (DAN SD2012-064)*;
* *Alternative Learning Experience (ALE) (DAN SD2012-074)*.
 | **Retain** for 1 year after placement denied or declined *and*expiration of appeal period, *whichever is later* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2014-026Rev. 0 | ***Student Assignment – Special Service Programs (Student Placed)***Records relating to student participation in special service schools, programs, classes and activities offered by the district (including contractors) that are regulated by specific statute. See exclusions, below. Programs/classes include, but are not limited to:* Highly capable/gifted/talented (chapter 392-170 WAC);
* Learning Assistance Program (LAP) (chapter 392-162 WAC);
* Indian Education (Title VII {20 U.S.C. 7401 et seq.});
* Running Start Program (chapter 392-169 WAC);
* Dropout Reengagement (chapter 392-700 WAC).

Records may include, but are not limited to:* Nominations, observations, recommendations;
* Screening/interview/intake forms and checklists;
* Testing results;
* Communications with parents/legal guardians.

Excludes:* Special education programs regulated by chapter 28A.155 RCW;
* Transitional bilingual instruction programs regulated by chapter 28A.180 RCW;
* Homeless child and youth programs covered by SD2012-064;
* Alternative Learning Experience (ALE) records covered by SD2012-074;
* Grade documentation covered by SD51-06E-02.
 | **Retain** for 3 years after student graduates or withdraws from district *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2014-027Rev. 1 | ***Student Assignment – Special Service Programs (Transitional Bilingual Instruction)***Records relating to determining student eligibility for and student participation in Transitional Bilingual Instruction Programs (TBIP) pursuant to chapter 28A.180 RCW, such as English Language Learners (ELL) or English as a Second Language (ESL). Includes ineligible and eligible students. Records include, but are not limited to:* Home Language Survey (HLS) verified by parent/legal guardian or emancipated student;
* Communications with parents/legal guardians, notifications, etc.;
* English language proficiency assessment results (placement and annual tests);
* Documentation pertaining to student’s exit from program.
 | **Retain** for 3 years after student graduates or withdraws from district *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05J-02Rev. 3 | ***Student Assignment – Transfer Requests (Granted)***Records relating to parent/guardian requests for their student to be released to attend a nonresident school district, or to transfer in from the student’s resident school district (commonly referred to as boundary exceptions) in accordance with RCW 28A.225.220, or for an intra-district school transfer in accordance with RCW 28A.225.270, where the request is granted.  | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2012-067Rev. 2 | ***Student Assignment – Transfer Requests (Not Granted)***Records relating to parent/guardian requests for their student to be released to attend a nonresident school district, or to transfer in from the student’s resident school district (commonly referred to as boundary exceptions) in accordance with RCW 28A.225.220, or for an intra-district school transfer in accordance with RCW 28A.225.270, where the request is not granted. *Note: School district decisions may be appealed to the Office of Superintendent of Public Instruction (OSPI) in accordance with RCW 28A.225.230.* | **Retain** for 3 years after denial of request  *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05J-04Rev. 3 | ***Student Registration***Records documenting student entry into and/or withdrawal from the school/district, including students who register but do not attend.Includes, but is not limited to:* Applications and registration forms or cards;
* Annual printouts verified and signed by parent/legal guardian.

Excludes records relating to student transfers, which are covered by *Student Assignment – Transfer Requests (Granted) (DAN SD51-05J-02)*. | **Retain** for 3 years after superseded *or*3 years after student graduates or withdraws from school/ district, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. STUDENT ATTENDANCE/ABSENCE
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-04-01Rev. 2 | ***Absence (Student) – Grades K-8***Records relating to student absence (excused and unexcused), where a truancy petition has not been filed. Includes, but is not limited to:* Phone logs and correspondence (including email) to and from parent/legal guardian verifying student absence;
* Absence notifications and excuse notes from parent/legal guardian, medical provider, etc.;
* Meeting and conference notes;
* Records documenting steps taken to eliminate or reduce student absence.

*Note: If a truancy petition is filed, these records become part of the truancy case file and are covered by Truancy Case Files (DAN**SD51-04-10)*. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2011-154Rev. 1 | ***Absence (Student) – Grades 9-12***Records relating to student absence (excused and unexcused), where a truancy petition has not been filed. Includes, but is not limited to:* Phone logs and correspondence (including email) to and from parent/legal guardian verifying student absence;
* Absence notifications and excuse notes from parent/legal guardian, medical provider, etc.;
* Meeting and conference notes;
* Records documenting steps taken to eliminate or reduce student absence.

*Note: If a truancy petition is filed, these records become part of the truancy case file and are covered by Truancy Case Files (DAN**SD51-04-10)*. | **Retain** for 1 year after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-04-05Rev. 2 | ***Attendance***Records documenting student presence or absence, each day and/or period, in all grade levels.Includes, but is not limited to:* Attendance in all learning environments (classroom, alternative learning experience, pre-kindergarten programs administered by the agency, etc.);
* Attendance in institutional education programs (notification from state- or county-operated juvenile detention centers/groups homes, adult jails and state correctional facilities, community schools, etc.);
* Attendance cards, bubble sheets (including student identifiers), and all other source and supporting documentation;
* Paper and/or electronic input;
* All grade levels (Pre-K, K-12, etc.).

Excludes grant-funded programs (Head Start, etc.) which are covered by records series in the Financial Management section of the *Local Government Common Records Retention Schedule (CORE) / State Government General Records Retention Schedule*. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-06C-31Rev. 2 | ***Attendance – School-Sponsored Activities, Events and Programs***Records relating to attendance at school or district-sponsored events and extracurricular activities, such as field trips, music, science and athletic activities or competitions, traffic safety programs, safety patrol, etc., whether taking place at school/district facilities or elsewhere. Includes, but is not limited to:* Notices and announcements;
* Sign-up sheets, rosters, registration forms;
* Parent/legal guardian permissions (approval for use of private vehicles, waiver of liability, emergency information, etc.);
* Chaperone/driver lists and information;
* Transportation arrangements (including bus trip requests/authorizations, ticket logs, private vehicle checklists, etc.).

Excludes recordscovered by:* *Accidents/Incidents – No Claim Filed (Under Age 18) (DAN GS50-06C-03 / GS* *18007)*;
* *Accidents/Incidents – No Claim Filed (Age 18 and Older) (DAN* *GS2010-081 / GS* *18008)*;
* *Claims for Damages (DAN* *GS50-01-10)*;
* *Litigation Case Files (DAN* *GS53-02-04)*;
* *Litigation Case Files – Routine (DAN GS 18004)*;
* *Litigation Case Files – Significant (DAN GS 18009)*.
 | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-04-14Rev. 2 | ***Student Tracking***Recordings documenting student whereabouts while at school.Includes, but is not limited to:* Student sign in/sign out sheets, late arrival/early departure logs, etc.;
* Temporary authorizations for bus and pick-up changes.

Excludes admit slips and hall passes, covered by *Informational Notifications/ Communications (DAN GS50-02-05 / GS 50001)*. | **Retain** until end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-04-10Rev. 1 | ***Truancy Case Files***Records relating to student absence where a truancy petition has been filed against the parent/legal guardian in accordance RCW 28A.225.035. Includes, but is not limited to: * Absence reports/profiles;
* Phone logs and correspondence (including email) to and from parent/legal guardian;
* Meeting and conference notes;
* Records documenting steps taken to eliminate or reduce student absence.
* Petitions to compel school attendance;
* Compulsory school attendance filing forms;
* Intervention plans;
* Truancy conference counseling forms.
 | **Retain** for 6 years after case closed *or*6 years after student leaves/withdraws from school district, *whichever is later* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-04-07Rev. 1 | ***Truancy Petition/Disposition Log***Summary listing/log which tracks the filing and disposition of truancy petitions to compel school attendance. | **Retain** for 6 years after last entry *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |

| * 1. STUDENT DISCIPLINE
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2020-004Rev. 0 | ***Student Behavioral Support***Behavioral Support records cover routine/minor behavior issues for students associated with missed instruction. Behaviors include but are not limited to: property misuse, misuse of technology, disturbing the learning of others, excessive talking, unintentional physical contact, etc. *Note: Behavioral Support records are not state reportable.* | **Retain** until end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05F-08Rev. 3 | ***Student Discipline – Founded (Code of Conduct Violations)***Records related to documenting and reprimanding the disruptive behavior of individual students. Code of Conduct Violations can include willfully disobeying a teacher, using abusive or foul language at a school district employee, school volunteer, or another student, or violating school rules, and interfering with an orderly education process. Includes, but is not limited to:* Written reprimands and/or written notifications to parents;
* Harassment, Intimidation, and Bullying (HIB) form.

Excludes records covered by: * *Civil Rights – Violation Complaints (1986 and later) (DAN GS2017-002)*;
* *Student Behavioral Support (DAN SD2020-004)*;
* *Student Discipline – Founded (State Reportable Misconduct) (DAN SD2017-003)*.

*Note: Code of Conduct Violations are not state reportable.* | **Retain** for 3 years after matter resolved *or*3 years after student graduates or withdraws, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2020-005Rev. 0 | ***Student Discipline – Founded (State Reportable Misconduct)***Records documenting a student’s exceptional misconduct (weapons, sexual violence, drugs as per RCW 28A.600.460) resulting in long term suspension and/or expulsion. Includes, but is not limited to:* Written notifications to parents;
* Harassment, Intimidation, and Bullying form (HIB);
* Student disciplinary action reports per RCW 28A.600.460.

Excludes records covered by: * *Civil Rights – Violation Complaints (1986 and later) (DAN GS2017-002)*;
* *Student Behavioral Support (DAN SD2020-004)*;
* *Student Discipline – Founded (Code of Conduct Violations) (DAN SD51-05F-08)*.
 | **Retain** for 6 years after matter resolved *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2020-006Rev. 0 | ***Student Discipline – Unfounded***Records relating to misconduct complaints in which the complaint proved to be unsubstantiated upon appeal or additional information received.  | **Retain** until no longer needed for agency business *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. STUDENT RECORDS

Reference chapter 392-185 WAC and chapter 392-415 WAC. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-05F-05Rev. 1 | ***General Educational Development (GED) Test – Eligibility***Records relating to student requests for approval to take the General Educational Development (GED) test in accordance with chapter 180-96 WAC in order to receive a Certificate of Educational Competence pursuant to chapter 131-48 WAC. Includes, but is not limited to:* Agency copy of application/request for approval to test and determination of eligibility signed by a designated district employee stating that there is a substantial and warranted reason for the student to leave the regular high school education program;
* Notarized statement/letter for home school students pursuant to RCW 28A.225.010(4);
* Agency copies of student GED test scores and Certificates of Educational Competence.

*Note: The State Board of Community and Technical Colleges (SBCTC) administers GED testing and retains a record of all certificates of educational competence issued until the recipient reaches age 90 in accordance with its records retention schedule.* | **Retain** until no longer needed for agency business *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-05F-02Rev. 2 | ***Authorization For/Release of Student Records – Prior Consent Not Required***Records relating to each request for access to – and each disclosure of – personally identifiable information from the education records of each student where prior consent is not required in accordance with 34 CFR § 99.31, 34 CFR §99.32(d), and WAC 392-172A-05195, and where disclosure records are not required to be retained longer than 3 years in accordance with federal or state statute.Includes, but is not limited to, requests from and release of records to:* The parent or eligible student;
* A school official under 34 CFR §99.31(a)(1);
* Certain parties seeking directory information under 34 CFR § 99.37;
* A judicial order or subpoena under 34 CFR §99.31(a)(9)(ii)(A), (B) & (C).

Excludes records covered by *Authorization For/Release of Student Records – Prior Consent or Documentation Required (DAN SD2012-068).**Reference: Family Educational Rights and Privacy Act (FERPA).* | **Retain** for 3 years after request received and records released *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2012-068Rev. 1 | ***Authorization For/Release of Student Records – Prior Consent or Documentation Required***Records relating to each request for access to – and each disclosure of – personally identifiable information from the education records of each student where prior consent is required in accordance with 34 CFR § 99.30, and/or where disclosure records are required to be retained in accordance with 34 CFR § 99.32. Includes, but is not limited to, requests from and release of records to:* Any party with written consent from the parent or eligible student;
* State and local educational authorities and federal officials and agencies listed in 34 CFR § 99.31(a)(3) pursuant to 34 CFR § 99.32;
* Private schools where the student is enrolled or plans to enroll pursuant to WAC 392-172A-05225(3);
* Officials of participating agencies providing or paying for transition services pursuant to WAC 392-172A-05225(2)(b).

Excludes records covered by *Authorization For/Release of Student Records – Prior Consent Not Required (DAN SD51-05F-02)*.*Reference: Family Educational Rights and Privacy Act (FERPA).* | **Retain** until the education records of the student are no longer retained *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05F-03Rev. 1 | ***Confidential Reports (a.k.a. Guidance Reports or Supplementary Reports)***Includes subjective reports and anecdotal information from district, outside agencies and individuals.*Remarks: These records should be separated from the cumulative folder with access limited in accordance with the Family Educational Rights and Privacy Act (FERPA).* | **Retain** for 3 years after student graduates or withdraws *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-20-10Rev. 1 | ***Graduate List***Annual list of graduates.Excludes records covered by *Official Student Record (DAN SD51-05F-10).* | **Retain** for 6 years after current school year *then***Transfer** to Washington State Archives for permanent retention. | **ARCHIVAL****(Permanent Retention)**NON-ESSENTIALOFM |
| SD51-05F-10Rev. 3 | ***Official Student Record***Documentation of student enrollment history/grade progression for all grades and all schools (K-12). Record must contain student name, academic year, and school attended. Record may also contain additional personally identifiable information including address, phone number, classes attended, grades earned, attendance record, grade level completed, year completed, etc. Includes, but not limited to:* High school transcripts prepared in accordance with WAC 392-415-070 (including “met/not met” graduation requirements);
* Middle/junior high school transcript or other academic history showing courses taken and grades earned;
* Elementary enrollment history and grade progression;
* Legacy records such as permanent record cards & teacher registers (prior to 1940’s);
* Records documenting all successful requests for changes and changes made to the official student record, including modifications such as grade adjustments, graduation status, error corrections, etc.

*Note: All other records pertaining to each student belong in the cumulative folder, or are covered by other series.* | **Retain** for 100 years after student graduates or withdraws *then***Destroy**. | NON-ARCHIVAL**ESSENTIAL****(for Disaster Recovery)**OPR |
| SD2012-069Rev. 1 | ***Official Student Record – Change Request Denied***Records relating to requests for changes to official student records by a student/legal guardian, where the change is not allowed/made.  | **Retain** for 6 years after request denied *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-05F-11Rev. 1 | ***School Registers****Remarks: If there is no official student record that supersedes the school registers, these must be retained for 100 years.* | **Retain** until no longer needed for agency business  *then***Transfer** to Washington State Archives for appraisal and selective retention. | **ARCHIVAL****(Appraisal Required)**NON-ESSENTIALOFM |
| SD51-05F-07Rev. 4 | ***Student Cumulative Folder (Student File Folder)***Information (regardless of format) collected on each student, ***where not covered by a more specific records series***.Includes, but is not limited to: * Date of entry and withdrawal;
* Identifying information (name, birth date, sex, year in school, address, telephone number, parent/legal guardian name, ethnic classification, contact information (parent/legal guardian place of employment, family doctor, babysitter, siblings), etc.);
* Student identification photos;
* Grade progression and other student progress reports;
* Results of standardized tests and assessments (MSP, HSPE, WELPA, SAT, AP/IB, etc.);
* Records of student accomplishments and participation in school activities;
* Such other information as shall enable staff to counsel with students and plan appropriate activities.

Excludes records covered by *Official Student Records (DAN SD51-05F-10)*.*Note: When a student transfers to another school district, only copies of these records are to be forwarded. Original records are to remain with the district for the minimum retention period.*  | **Retain** for 3 years after student graduates or withdraws from school/district *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2020-002Rev. 0 | ***Court Orders Regarding Students***Court orders provided to the agency. These include non-contact orders, parenting plans, restraining orders and other court records. Excludes records covered by *Compulsory Process Served on the Agency (Not Party to Litigation) (DAN GS2011-172 / GS 18006)*. | **Retain** until superseded  *or*3 years from the expiration date of the instrument, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05F-09Rev. 1 | ***Student Locator Cards/Class Schedules*** | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |

1. STUDENT SERVICES

| * 1. FOOD SERVICES

The activity of providing nutritionally balanced meals to students. Reference chapter 28A.235 RCW and chapter 392-157 WAC. |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-08-01Rev. 1 | ***Catering Requests***Requests for use of kitchen and the supplying of food and labor. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-02Rev. 1 | ***Food Handler’s Permit/Food Worker Card***Documentation that all agency employees (includes volunteers) who handle unwrapped or unpackaged food have been issued a food worker card pursuant to chapter 69.06 RCW and chapter 246-217 WAC. | **Retain** until obsolete or superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-03Rev. 1 | ***Food Service Orders***For supplies needed to operate school lunch program. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-04Rev. 1 | ***Free or Reduced-Price Meal Applications***Applications for reduced-price or free meals in compliance with the National School Lunch Program.*Reference: National School Lunch Act Provisions 1, 2, & 3 - Fact Sheet and National School Lunch Program 7 CFR § 210.* | **Retain** for 6 years after final reimbursement based on the application *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-08-15Rev. 1 | ***Free or Reduced-Price Meal Application Verifications***Records relating to verification of eligibility for free and reduced price meals and free milk pursuant to 7 CFR § 245.6a. | **Retain** for 3 years after end of federal fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-20-04Rev. 1 | ***HACCP (Hazard Analysis & Critical Control Points) Food Safety Plan***Food safety hazard analysis plans and reports prepared in accordance with the Hazard Analysis & Critical Control Point (HACCP) system pursuant to 9 CFR § 417 and 21 CFR § 123.6. Includes annual validations and any modifications or changes. | **Retain** for 6 years after obsolete or superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-08-14Rev. 1 | ***Health Inspections***Inspection of facility to ensure it meets federal and state standards. | **Retain** until superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-05Rev. 1 | ***Meal and Milk Count Reports and Documentation***Record of daily meals and milk served. *Remarks: Reference 7 CFR § 210.* | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-13Rev. 1 | ***Meal Production Records***Records of amount of food prepared and served to meet meal patterns. | **Retain** for 3 years after end of federal fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-06Rev. 1 | ***Meal Ticket/Credit Log***Listing of meal tickets/credits issued, including number, date, name of purchaser, and/or recipient and amount paid. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-07Rev. 1 | ***Meal Tickets***Prepaid meal tickets. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-16Rev. 1 | ***Menus*** | **Retain** until obsolete or superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-08Rev. 1 | ***Monthly Meal Count Reimbursement Report***Includes monthly meal count and edit checks as supporting documentation. | **Retain** for 6 years after end of fiscal year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-08-09Rev. 1 | ***School Breakfast Program Plan***Includes plan and backup documentation submitted to OSPI for program approval. | **Retain** for 6 years after plan obsolete or superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-08-10Rev. 1 | ***Site Health Permit*** | **Retain** until obsolete or superseded *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-11Rev. 1 | ***Stock Control Records***Listing of food items, supplies, and commodities used for manual count of inventory on hand. May be used to complete the F-196 report.  | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-08-12Rev. 1 | ***Stock Inventory Report Summary***Prepared from stock control records and food service orders. Lists quantities on hand, received, used and unit prices. May be used to complete the F-196 report. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |

| * 1. HEALTH SERVICES

The activity of providing health care/services to students. Reference chapter 28A.210 RCW, chapter 246.760 WAC and RCW 4.16.350.  |
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD2012-071Rev. 2 | ***Health Care/Services Provided to Students***Records documenting the administration of health care and services provided to students by the school/district (includes staff, contractors, and volunteers), such as: * First aid; minor illness/injury; emergencies (diabetes, anaphylaxis, injuries, concussion/ head injury, etc.);
* Health screenings (visual, auditory, etc.) pursuant to chapter 28A.210 RCW;
* Speech-language pathology, mental health care, physical therapy, catheterization, etc.;
* Administration of medication pursuant to RCW 28A.210.260 – 270 & chapter 18.79 RCW.

Records may include, but are not limited to:* Parent/legal guardian authorization/permission for administration of medication and/or health care/services and procedures, etc.; requests for student to be exempted from health-related care/services (such as health screenings, etc.);
* Medication/treatment order for students with life-threatening health conditions (RCW 28A.210.320) or chronic health conditions;
* Individual health plans (IHP);
* Health screening results and notification of regulatory agencies, parents/legal guardians, and other bodies in accordance with chapter 28A.210 RCW;
* Communications sent or received that relate to student health care/services (to or from parent/legal guardian, medical professionals, regulatory agencies, etc.);
* Student medical records received from outside health care/service providers which are used for planning and execution of health care/services by the school/district.

*Note: Retention is based on 8-year statute of limitations for the commencement of actions for injuries resulting from health care or related services (RCW 4.16.350).* | **Retain** for 8 years after last provision of health-related services *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-09-05Rev. 2 | ***Health/Nurse Room Registry***Registry, log, or list of students appearing in the health room or nurse’s office due to health-related issues. May include sign-in/sign-out sheet, date, time, etc. Excludes records covered by *Health Care/Services Provided to Students (DAN SD2012-071)*.*Note: Retention is based on 8-year statute of limitations for the commencement of actions for injuries resulting from health care or related services (RCW 4.16.350).* | **Retain** for 8 years after last entry *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2012-072Rev. 1 | ***Medication Errors***Records relating to documenting and reporting instances of medication errors, including suspected theft.*Note: Retention is based on 8-year statute of limitations for the commencement of actions for injuries resulting from health care or related services (RCW 4.16.350).* | **Retain** for 8 years after end of school year *or*8 years after investigation completed/matter resolved, *whichever is later* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD2012-073Rev. 1 | ***Medication Inventory***Records relating to the inventory and/or final disposition of unused student medication in the school’s custody. Includes, but is not limited to:* Controlled substance counting;
* Return of medication to parent/legal guardian, delivery to law enforcement agency, or destruction.

Excludes:* Administration of medication covered *by Health Care/Services Provided to Students (DAN SD2012-071)*;
* Instances of suspected theft covered by *Medication Errors (DAN SD2012-072)*.
 | **Retain** for 1 year after medications returned/ destroyed/delivered to law enforcement agency *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. INTERSCHOLASTIC ACTIVITIES
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| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-20-02Rev. 1 | ***Interscholastic Activities – Achievements***Records documenting individual, team, and group achievements in interscholastic activities and contests, where students from more than one school district compete with each other for possible advancement to regional, district, state, and/or national levels of competition. Interscholastic activities and contests include, but are not limited to, those overseen by:* Office of the Superintendent of Public Instruction: Distributive Education Clubs of America (DECA), Future Farmers of America (FFA), Future Business Leaders of America (FBLA), etc.;
* Association of Washington School Principals: Student Council, National Honor Society, Senate Youth Program, etc.;
* Washington Interscholastic Activities Association (WIAA): Drama, forensics, music, spirit, athletics;
* Independent sponsors: Chess, History Day, Knowledge Bowl, Math Olympiad, Science Bowl, Spelling Bee, YMCA Youth & Government Mock Trial Program, etc.

Records include, but are not limited to:* Schedules (dates and locations of competitions, events, games, meets & matches);
* Rosters;
* Event/tournament programs, photos, posters, etc.;
* School protests of events/games;
* Awards/recognition and rankings.

*Note: Other historical materials and artifacts (non-records) should also be retained by the school for commemorative events and displays (school reunions, centennials, etc.) or made available to local heritage organizations. Items may include banners, trophies, uniforms, etc.* | **Retain** for 6 years after end of school year *then***Transfer** to Washington State Archives for appraisal and selective retention. | **ARCHIVAL****(Appraisal Required)**NON-ESSENTIALOPR |
| SD51-03-04Rev. 3 | ***Interscholastic Activities – Eligibility***Records relating to student and school eligibility and registration for interscholastic activities.Includes, but is not limited to:* Physicals, insurance, emergency contact/medical information, etc.;
* Grade point, appeals, etc.;
* Registration (student, league, etc.).

Excludes records covered by:* *Health Care/Services Provided to Students (DAN**SD2012-071)*;
* Parent/legal guardian consent forms covered by *Attendance – School-Sponsored Activities, Events and Programs* *(DAN SD51-06C-31)*.
 | **Retain** for 3 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-03-15Rev. 1 | ***Interscholastic Activities – Self-Evaluation Surveys***Records relating to the school/district’s compliance with Title IX of the Educational Amendments Act of 1972 and 34 CFR §106.41.Includes, but is not limited to, self-evaluation surveys on activities students would like to participate in and limitations of students, completed in accordance with 34 CFR 106.3(c). | **Retain** for 6 years after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

| * 1. TRANSPORTATION SERVICES

The activity of transporting students to and from school and school related activities.  |
| --- |
| **DISPOSITION AUTHORITY NUMBER (DAN)** | **DESCRIPTION OF RECORDS** | **RETENTION AND** **DISPOSITION ACTION** | **DESIGNATION** |
| SD51-05G-02Rev. 1 | ***Application for Special Transportation – Accepted***For students with medical problems or physical disabilities to receive district transportation services. | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD51-05G-14Rev. 1 | ***Application for Special Transportation – Denied***  | **Retain** for 1 calendar year after application denied *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOFM |
| SD2014-028Rev. 0 | ***Bus Sign/Light Violation – Failure to Stop***Records relating to driver/vehicle failure to stop for a school bus in accordance with RCW 46.61.370.Includes, but is not limited to:* Form SPI 1514 completed pursuant to RCW 46.61.372, whether filed with law enforcement or not;
* Form SPI 1514 returned by law enforcement agency indicating disposition completion.
 | **Retain** for 1 year after end of school year *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |
| SD51-05G-07Rev. 2 | ***Student Transportation Report Records***Records relating to student transportation reports as described in WAC 392-141-420.Includes, but is not limited to:* Final reports;
* School bus route log and school bus driver daily logs, including those required in WAC 392-141-330;
* Verification of number of students boarding at each bus stop;
* Location of school bus stops;
* School bus mileage and district car mileage;
* Fuel documentation;
* Transportation documentation related to McKinney-Vento Homeless Act;
* Correspondence, publications, and other materials distributed to parents describing the transportation funding process;
* Other operational data and descriptions.
 | **Retain** for 4 years after end of fiscal year *or*until completion of State Auditor’s examination report, *whichever is sooner* *then***Destroy**. | NON-ARCHIVALNON-ESSENTIALOPR |

GLOSSARY

|  |
| --- |
| ***Appraisal***  |
| The process of determining the value and disposition of records based on their administrative, legal, and fiscal use; their evidential and informational or research value; and their relationship to other records. |
| ***Archival (Appraisal Required)***  |
| Designation for public records that may possess enduring legal and/or historical value and must be appraised by the Archives. Such records are to be evaluated, sampled, and weeded according to archival principles by Archives staff. Records appraised as non-archival may be destroyed after their retention has been met. |
| ***Archival (Permanent Retention)***  |
| Designation for public records that possess enduring legal and/or historical value and must not be destroyed. State government agencies must transfer these records to the Archives at the end of their minimum retention period. Local government agencies must either transfer these records to the Archives or retain and preserve them according to archival best practice until transferred to the Archives. Other than removing and disposing of duplicates, the Archives will not sample, weed, or otherwise dispose of records with this designation. |
| ***Disposition*** |
| Actions taken with records when they are no longer required to be retained by an agency. Possible disposition actions include transfer to the Archives and destruction. |
| ***Disposition Authority Number (DAN)***  |
| Control number for a specific records series in a retention schedule that authorizes a retention period and disposition action for records belonging to that series. |
| ***Essential Records*** |
| Public records that agencies must have in order to maintain or resume business continuity or to document the legal standing and rights of individuals and organizations. While the retention requirements for essential records may range from very short-term to archival, these records are necessary for an agency to resume its core functions following a disaster. Security backups of these public records should be created and may be deposited with the Archives in accordance with chapter 40.10 RCW. Copies of master indexes, lists, registers, tracking systems, databases, and other finding aids should also be transferred with the records. |
| ***Local Records Committee*** |
| Committee established by RCW 40.14.070 to review and approve disposition of local government records through records retention schedules. The Committee’s three members include the State Archivist and one representative each from the Office of the Attorney General and the State Auditor. |
| ***Non-Archival*** |
| Designation given to public records that do not possess sufficient historical value to be designated as “Archival.” Agencies must retain these records for the minimum retention period specified by the appropriate current records retention schedule. Agencies should destroy these records after their minimum retention period expires, provided the records are not required for litigation, public records requests, or other purposes required by law. |
| ***Non-Essential Records*** |
| Public records which are not required in order for an agency to resume its core functions following a disaster, as described in chapter 40.10 RCW. |
| ***OFM (Office Files and Memoranda)***  |
| Public records not defined and classified as official public records in RCW 40.14.010 and other documents or records as determined by the records committee to be office files and memoranda. |
| ***OPR (Official Public Records)*** |
| Public records necessary to document transactions relating to public property, public finances, and other agency business, or records determined by the records committee to be official public records. |
| ***Public Records*** |
| Records that have been created or received by any government agency in Washington State in connection with the transaction of public business regardless of physical form or characteristics. |
| ***Records Series*** |
| A group of records performing a specific function, which is used as a unit, filed as a unit, and may be transferred or destroyed as a unit. A records series may consist of a single type or a number of different types of documents that are filed together to document a specific function. |
| ***State Records Committee*** |
| Committee established by RCW 40.14.050 to review and approve disposition of state government records. Its four members include the State Archivist and one representative each from the Office of the Attorney General, Office of the State Auditor, and the Office of Financial Management. |

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