

**Summary of Changes**  
***Public Schools (K-12) Records Retention Schedule v.9.0 (August 2025)***

**New Records Series Added**

- Eleven (11) new records series have been added to this records retention schedule:
  1. **Child and Adult Care Food Program (CACFP) Reimbursement Eligibility (DAN SDXXXX-XXX) p.45**  
*“6 years after end of fiscal year (Non-Archival)”*
  2. **HACCP (Hazard Analysis & Critical Control Points) – Monitoring (DAN SDXXXX-XXX) p.45**  
*“2 years after end of school year (Non-Archival)”*
  3. **Isolation and Restraint – Age 18 and Older (DAN SDXXXX-XXX) p.31**  
*“3 years after date of restraint/isolation incident (Non-Archival)”*
  4. **Isolation and Restraint – Under Age 18 (DAN SDXXXX-XXX) p.32**  
*“3 years after student attains age 18 (Non-Archival)”*
  5. **Proctoring (DAN SDXXXX-XXX) p.7**  
*“3 years after conclusion of test/assessment (Non-Archival)”*
  6. **Sexual Harassment/Sex Discrimination Complaints (Title IX) – Employees/Others (DAN SDXXXX-XXX) p.15**  
*“6 years after issuance of determination and completion of disciplinary action (if any) and expiration of appeal period (if any) (Non-Archival)”*
  7. **Sexual Harassment/Sex Discrimination Complaints (Title IX) – Students (DAN SDXXXX-XXX) p.33**  
*“6 years after issuance of determination and completion of disciplinary action (if any) and expiration of appeal period (if any) (Non-Archival)”*
  8. **Special Education Program – Student Testing Protocols (Completed) (DAN SDXXXX-XXX) p.59**  
*“Until superseded by subsequent reevaluation or for 3 years after conclusion of testing, whichever occurs first (Non-Archival)”*
  9. **Student Safety (DAN SDXXXX-XXX) p.10**  
*“3 years after student graduation or withdrawal (Non-Archival)”*
  10. **Student Threat Assessments (DAN SDXXXX-XXX) p.11**  
*“6 years after close of assessment (Non-Archival)”*
  11. **Traffic Safety Education (DAN SDXXXX-XXX) p.69**  
*“3 years after conclusion of instruction (Non-Archival)”*

## **Retention Changes**

- Two (2) records series have changes to their retention period/cutoff:
  1. **Certificated Years of Experience (DAN SD2014-022) p.16**  
Changed from “60 years after expiration or renewal of certification (Non-Archival)” to “60 years after issuance (Non-Archival)”  
*Rationale: Agencies report that these are not renewed and do not expire.*
  2. **Impact Aid Programs – Child Not Eligible (DAN SD51-03C-17) p.9**  
Changed retention from “Until submittal of the application for federal impact aid (Non-Archival)” to “Retain until 3 years after last payment for a fiscal year or until resolution of federal audit findings/adjustments, if any (Non-Archival)”  
*Rationale: New retention period required in 34 CFR 222.10.*

## **Other Minor Changes**

- Educational Service Districts (ESDs) function has been removed because all records series under that function have been discontinued.
- Superintendent section has been removed because all record series under that activity have been discontinued or moved to a different section.
- One (1) records series has moved from the “Superintendent” section to the “Community Relations” section:
  1. **Official District Negotiated School Calendars (DAN SD51-05-06) p.6**
- Twenty-five (25) records series have changes to their title and/or description:
  1. **Application for Special Transportation – Accepted (DAN SD51-05G-02) p.51**
  2. **Application for Special Transportation – Denied (DAN SD51-05G-14) p.51**
  3. **Apportionment Advance/Revision Requests (was Budget Revision Requests) (DAN SD51-02A-04) p.12**
  4. **Catering Requests (DAN SD51-08-01) p.44**
  5. **Course Additions, Deletions, and Changes (DAN SD51-06A-04) p.53**
  6. **Court Orders Regarding Students (DAN SD2020-002) p.43**
  7. **Curriculum Requests/Waivers/Substitutions (DAN SD51-06A-11) p.54**
  8. **Curriculum Summaries and Guides (DAN SD51-06A-05) p.55**
  9. **Employee Sexual Misconduct Accusations/Investigations – Sustained and Unfounded (DAN SD2014-020) p.13**
  10. **Employee Verbal Abuse/Physical Abuse Accusations/Investigations – Sustained and Unfounded (DAN SD2014-021) p.14**
  11. **Grade Documentation – Elementary (DAN SD51-06E-01) p.65**
  12. **Grade Documentation – Secondary (DAN SD51-06E-02) p.66**
  13. **Home/Hospital Tutoring (DAN SD51-09-01) p.66**
  14. **Instructional Materials Subject File (DAN SD51-06A-10) p.55**

15. **Lesson Plans and Other Teaching Materials (DAN SD51-06E-03) p.66**
  16. **Nutrition Program Plans (DAN SD51-08-09) p.46**
  17. **Parent/Legal Guardian Declaration of Intent (DAN SD51-09A-05) p.57**
  18. **Parent/Legal Guardian Permission Slips for Internet Access and Film Viewing (DAN SD51-06A-12) p.56**
  19. **School Master Schedule (DAN SD51-20-03) p.56**
  20. **School Registers (DAN SD51-05F-11) p.41**
  21. **Signature of Receipt Record (DAN SD51-01-46) p.16**
  22. **Special Education Program – Student History File (DAN SD51-05I-02) p.60**
  23. **Statement of Requirements and Expectations Signed and Returned by Parent/Legal Guardian (DAN SD51-01-49) p.56**
  24. **Student Locator Cards/Class Schedules (DAN SD51-05F-09) p.43**
  25. **Transfer of Home-Based Student to School/District (DAN SD51-09A-03) p.57**
- Two (2) sections have changed their heading and/or section descriptions:
    1. Added description to **Student Administration** section.
    2. **Student Learning** section renamed to **Teaching and Learning** and section description added.

### **Archival Series Being Revoked**

- A total of eight (8) “Archival” records series are being revoked.
- Six (6) “Archival” records series are being revoked as they are covered by another “Archival” records series:
  1. **Course Description Catalog (DAN SD51-06A-19)** covered by Publications – Master Set (DAN GS50-06F-04)/State Publications (DAN GS 15008)
  2. **Graduate List (DAN SD51-20-10)**
  3. **Graduation Requirements (DAN SD51-06A-08)** covered by Policies and Procedures – Agency Core Mission (DAN GS50-01-24/GS 10002)
  4. **Historical Records, Materials and Artifacts from Commemorative Events and Displays (DAN SD51-01-52)** covered by Celebrations/Ceremonies/Events - Significant (DAN GS 2011-166/GS 05009) and Celebrations/Ceremonies/Events – Routine (DAN GS2024-008/GS 05008)
  5. **List of Services Provided by the School District (DAN SD51-09A-01)** covered by Informational Notifications/Communications (DAN GS50-02-05/GS 50001)
  6. **Superintendent of Schools (General) (DAN SD51-05-13)** covered by Stakeholder Liaisons (Significant) – Elected Officials and Agency Heads (DAN GS50-01-12)/Stakeholder Group Relations (DAN GS 05010)
- Two (2) “Archival” records series are being revoked as they are covered by another “Non-Archival” records series:
  1. **Accreditation (Outcome) (DAN SD51-05-11)** covered by Authorizations/Certifications Received by Agency (DAN GS50-01-42/GS 21013)

2. **Basic Education Act Compliance (DAN SD51-05-10)** covered by Authorizations/Certifications Received by Agency (DAN GS50-01-42/GS 21013)

### **Non-Archival Series Being Revoked**

- A total of thirty-four (34) “Non-Archival” records series are being revoked.
- Thirty (30) “Non-Archival” records series are being revoked as they are covered by another “Non-Archival” records series:
  1. **Accreditation (Applications/Maintenance) (DAN SD2020-001)** covered by Authorizations/Certifications Received by Agency (DAN GS50-01-42/GS 21013)
  2. **Administration of Federal and State Categorical Grant Programs (DAN SD51-06A-02)** covered by Grants Received by Agency (DAN GS2024-014/GS 23004)
  3. **Agency-Provided Training – In-Service Education Program (DAN SD51-04G-01)** covered by Training – Mandatory or Certification/Hours/Credit Provided (DAN GS2011-180/GS 22008)
  4. **Certificate Information Summary (DAN SD51-14-02)** covered by Authorizations/Certifications – Employees (General) (DAN GS2011-190)/Authorizations/Certifications – Human Resources (General) (DAN GS 03046)
  5. **Demographic and Enrollment Projections (DAN SD51-07-08)** covered by Budget Development and Funding Allocation (DAN GS2024-004)/Allotment Management and Budget Development (DAN GS 01040)
  6. **Essential Academic Learning Requirements (EALR) – Individual Reports (DAN SD51-06A-09)** covered by Reporting to External Agencies (Mandatory) (DAN GS2012-028/GS 19004)
  7. **Essential Academic Learning Requirements (EALR) – Program Files (DAN SD51-06A-06)** covered by Business/Work Plans (DAN GS50-01-38/GS 09008)
  8. **Essential Academic Learning Requirements (EALR) – Program Results (DAN SD51-06A-07)** covered by Reporting to External Agencies (Mandatory) (DAN GS2012-028/GS 19004)
  9. **Food Handler’s Permit/Food Worker Card (DAN SD51-08-02)** covered by Authorizations/Certifications – Employees (General) (DAN GS2011-190)/Authorizations/Certifications – Human Resources (General) (DAN GS 03046)
  10. **Food Service Orders (DAN SD51-08-03)** covered by Financial Transactions – General (DAN GS2011-184/GS 01001)
  11. **Free or Reduced-Price Meal Application Verifications (DAN SD51-08-15)** covered by Child and Adult Care Food Program (CACFP) Reimbursement Eligibility (SDXXXX-XXX)
  12. **Free or Reduced-Price Meal Applications (DAN SD51-08-04)** covered by Child and Adult Care Food Program (CACFP) Reimbursement Eligibility (SDXXXX-XXX)
  13. **HACCP (Hazard Analysis & Critical Control Points) Food Safety Plan (DAN SD51-20-04)** covered by Nutrition Program Plan (DAN SD51-08-09)
  14. **Health Inspections (DAN SD51-08-14)** covered by Authorizations/Certifications Received by Agency (DAN GS50-01-42/GS 21013)

15. **List of HIV/AIDS and Hepatitis B Virus (HBV) Trained Employees (DAN SD51-04G-03)** covered by Records Documented as Part of More Formalized Records (DAN GS2016-009/GS 50012)
  16. **List of Students Participating in Home-Based Instruction (DAN SD51-09A-02)** covered by Records Documented as Part of More Formalized Records (DAN GS2016-009/GS 50012)
  17. **Meal Production Records (DAN SD51-08-13)** covered by Child and Adult Care Food Program (CACFP) Reimbursement Eligibility (DAN SDXXXX-XXX)
  18. **Meal Ticket/Credit Log (DAN SD51-08-06)** covered by Forms – Accountable (DAN GS2010-011/GS 12004)
  19. **Meal Tickets (DAN SD51-08-07)** covered by Forms – Accountable (DAN GS2010-011/GS 12004)
  20. **Medication Inventory (DAN SD2012-073)** covered by Inventory – Capital, Expendable and Consumable Assets (DAN GS50-03A-18)/Inventories – Supplies, Commodities, and Parts (DAN GS 16008)
  21. **Menus (DAN SD51-08-16)** covered by Child and Adult Care Food Program (CACFP) Reimbursement Eligibility (DAN SD51-08-05)
  22. **Monthly Meal Count Reimbursement Report (DAN SD51-08-08)** covered by Child and Adult Care Food Program (CACFP) Reimbursement Eligibility (DAN SD51-08-05)
  23. **Professional Education Permits (DAN SD51-14-04)** covered by Authorizations/Certifications – Employees (General) (DAN GS2011-190)/Authorizations/Certifications – Human Resources (General) (DAN GS 03046)
  24. **Public Research Access Requests (DAN SD51-01-35)** covered by Public Disclosure/Records Requests (DAN GS2010-014/GS 05001)
  25. **Reporting – Office of Superintendent of Public Instruction (OSPI) – General (DAN SD51-01-37)** covered by Reporting to External Agencies (Mandatory) (DAN GS2012-028/GS 19004)
  26. **Reporting – Student Health and Safety (DAN SD2012-063)** covered by Reporting to External Agencies (Mandatory) (DAN GS2012-028/GS 19004)
  27. **Reporting – Suspected Child Abuse (DAN SD51-09-03)** covered by Reporting to External Agencies (Mandatory) (DAN GS2012-028/GS 19004)
  28. **Site Health Permit (DAN SD51-08-10)** covered by Authorizations/Certifications Received by Agency (DAN GS50-01-42/GS 21013)
  29. **Stock Control Records (DAN SD51-08-11)** covered by Inventory – Capital, Expendable and Consumable Assets (DAN GS50-03A-18)/Inventories – Supplies, Commodities, and Parts (DAN GS 16008)
  30. **Stock Inventory Report Summary (DAN SD51-08-12)** covered by Inventory – Capital, Expendable and Consumable Assets (DAN GS50-03A-18)/Inventories – Supplies, Commodities, and Parts (DAN GS 16008)
- Four (4) “Non-Archival” records series are being revoked as they are no longer being created/received by the agency and all the records have met their retention and been destroyed:
    1. **Apportionment Report from OSPI (DAN SD51-02-03)**
    2. **Healthy Youth Survey Results (DAN SD51-12-05)**
    3. **Learning Resource Center (LRC) Selection Advisory Committee Purchase Recommendations (Voting Tabulation) (DAN SD51-13-03)**
    4. **Teacher Evaluation Forms of Learning Resource Center (LRC) Collections (DAN SD51-13-04)**

***Net Reduction in Records Series: 31 (from 125 series down to 94 series)***

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