



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

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

Behavioral Health Organizations need to use the following records retention schedules:

1. *Local Government Common Records Retention Schedule (CORE)*

This schedule covers records that are commonly created/received by most government agencies (including behavioral health organizations), such as records relating to:

- Board meetings
- Contracts and agreements
- Facilities management
- Financial transactions and accounting
- Grants/bonds
- Human resources
- Information systems/technology
- Legal affairs
- Media coverage
- Payroll
- Policies and procedures
- Public records requests

Records with minimal retention value (transitory records) are also covered in the *Local Government Common Records Retention Schedule (CORE)*.

2. *Public Health Records Retention Schedule*

This schedule covers records relating to health care services, such as:

- Background checks for firearms
- Client medical records (including release)
- Counseling
- Screenings and referrals

3. *Social Services Records Retention Schedule*

This schedule covers records relating to providing social services to adults and juveniles, such as:

- Client case files (support services)

**Additional advice regarding the management of public records is available from
Washington State Archives:**