



CORE Version 2.0 REVISION GUIDE

SUMMARY OF CHANGES

- **Information Management:** Completely revised and records series consolidated.
- **Electronic Information Systems:** Moved to Asset Management function. Records series consolidated and descriptions added.
- **Correspondence** (GS50-01-12) has been updated and divided into two series: **Communications – Executive** (GS50-01-12) and **Communications – Non-Executive** (GS2010-001).
- **GS50-02** has been split into five separate series and moved to a new section entitled “Records with Minimal Retention Value”.
- **Library** records have been transferred from the *Local Government General Records Retention Schedule (LGRRS)*, updated, and placed in the Information Management function of *CORE 2.0*.
- **Formatting** of new sections has been changed as follows:
 - ✓ The column for “Secondary Record Copies” has been removed. These records are now covered by the new records series **Secondary (Duplicate) Copies** (GS50-02-04).
 - ✓ The “Remarks” column has been removed.
 - ✓ A new column entitled “Designation” classifies each records series using the following schemata:

1. ARCHIVAL (Permanent Retention); or,	1. Essential; or,	1. Official Public Record (OPR); or,
2. ARCHIVAL (Appraisal Required); or,	2. Non-Essential.	2. Office Files and Memoranda (OFM).
3. NON-ARCHIVAL.		
 - ✓ **Disposition Authority Number (DAN)** formatting has changed. Newly assigned numbers will adhere to the following format: “GS2010-001.” This format is comprised of three parts:
 1. Retention schedule prefix (GS stands for the “General Series” found in *CORE* and *LGRRS*, AU for *County Auditor* series, etc.).
 2. Year (2010).
 3. Sequential three-digit number (001, 002, 003, etc.).
 - ✓ **Revision numbers** have been added. All DANs for records series which did not change from *CORE Version 1.0* – and all new series – have been assigned a revision number of “0.” Records series which have been altered in any way (name, description, retention, etc.) have been assigned a revision number of “1.”



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Discontinued Records Series

This table contains records series that have been discontinued and shows the current Disposition Authority Number for the records.
Please read carefully; some minimum retention periods have increased or decreased.

CORE Version 1.0				CORE Version 2.0				
Function: Activity	Discontinued DAN	Title	Retention	Function: Activity	DAN	Title	Retention	Rationale
Agency Management: Administration (General)	GS50-01-35	Telephone Logs and Usage Detail Reports	3 years	Asset Management: Electronic information Systems	GS50-06A-05 Rev. 1	Usage Monitoring	Retain for 1 year after activity.	One year sufficient to identify misuse.
Agency Management: Administration (General)	GS50-02	The following types of materials are designated as having no public record retention value.	Retain until obsolete or superseded	Records with Minimal Retention Value	GS50-02-01 Rev. 0 OR:	Agency Information – Routine	Retain until no longer needed for agency business.	Clarification.
					GS50-02-02 Rev. 0 OR:	Agency-Generated Forms and Publications – Copies	Retain until no longer needed for agency business.	Clarification.
					GS50-02-03 Rev. 0 OR:	General Information – External	Retain until no longer needed for agency business.	Clarification.
					GS50-02-04 Rev. 0 OR:	Secondary (Duplicate) Copies	Retain until no longer needed for agency business.	Clarification.
					GS50-02-05 Rev. 0	Transitory Information	Retain until no longer needed for agency business.	Clarification.
Agency Management: Community Relations	GS50-01-21	Mailing Lists	Destroy when obsolete or superseded	Records with Minimal Retention Value	GS50-02-05 Rev. 0	Transitory Information	Retain until no longer needed for agency business.	Consolidation.



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CORE Version 1.0				CORE Version 2.0				
Function: Activity	Discontinued DAN	Title	Retention	Function: Activity	DAN	Title	Retention	Rationale
Information Management: Electronic Information Systems	GS50-06A-04	Electronic Information Maintenance Documentation	Fiscal/accounting systems - termination plus 3 years. All other systems: Until all record data produced by the system pass their approved retention periods.	Asset Management: Electronic Information Systems	GS50-06A-03 Rev. 1	Applications – Technical Design and Implementation	Retain until application or version is no longer needed for agency business and all records within the application have been migrated or dispositioned in accordance with an approved records retention schedule.	Consolidation.
Information Management: Electronic Information Systems	GS50-06A-06	Electronic Information System Post Implementation Reviews	Until termination of system or program use.	Asset Management: Electronic Information Systems	GS50-06A-01 Rev. 1	Applications – Planning and Review	Retain for 6 years after finalization of project.	Consolidation.
Information Management: Electronic Information Systems	GS50-06A-07	Electronic Information System Programming and Implementation Data	Fiscal/accounting systems - termination plus 3 years. All other systems: Until all record data produced by the system pass their approved retention periods.	Asset Management: Electronic Information Systems	GS50-06A-03 Rev. 1	Applications – Technical Design and Implementation	Retain until application or version is no longer needed for agency business <i>and</i> all records within the application have been migrated or dispositioned in accordance with an approved records retention schedule.	Consolidation.



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Function: Activity	Discontinued DAN	Title	Retention	Function: Activity	DAN	Title	Retention	Rationale
Information Management: Electronic Information Systems	GS50-06G-01	Year 2000 Compliance Projects Documentation	Termination of project and/or contract plus 6 years.	Asset Management: Electronic Information Systems	GS50-06A-01 Rev. 1	Applications – Planning and Review	Retain for 6 years after finalization of project.	Consolidation.
Information Management: Records Management	GS50-09-12	Files Classification Guidelines	Destroy when obsolete or superseded.	Information Management: Records Management	GS50-09-02 Rev. 1	Records Control	Retain until no longer needed for agency business.	Consolidation.
Information Management: Records Management	GS50-09-07	Public Records Retention Schedule and Destruction Authorization	Local Records Committee – Permanent.	Information Management: Records Management	GS50-09-01 Rev. 1	Retention and Disposition Authorization	Retain until no longer needed for agency business.	Consolidation.
Information Management: Records Management	GS50-09-05	Public Records Destruction Affidavits	6 years.	Information Management: Records Management	GS50-09-06 Rev. 1	Destruction of Public Records	Retain for the life of the agency.	State Archivist has determined that these records possess enduring public value.
Information Management: Records Management	GS50-09-08	Records Center Transmittals, Inventories, and Indexes	Destroy when obsolete or superseded.	Information Management: Records Management	GS50-09-02 Rev. 1	Records Control	Retain until no longer needed for agency business.	Consolidation.



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CORE Version 1.0				CORE Version 2.0				
Function: Activity	Discontinued DAN	Title	Retention	Function: Activity	DAN	Title	Retention	Rationale
Information Management: Records Management	GS50-09-10	Records Destruction Authorization (Office of Record)	6 years.	Information Management: Records Management	GS50-09-06 Rev. 1	Destruction of Public Records	Retain for the life of the agency.	State Archivist determined that these records possess enduring public value.
Information Management: Records Management	GS50-09-11	Records Retrieval Request and Circulation Documentation	Keep until materials returned to records center.	Information Management: Records Management	GS50-09-02 Rev. 1	Records Control	Retain until no longer needed for agency business.	Consolidation.
Information Management: Mail Services	GS50-06D-01	Bulk Mailing Permit	6 years.	Agency Management: Contracts/ Agreements	GS50-01-11	Contracts, Agreements, and Warranties	Termination plus 6 years.	More accurate, function-based records series.
Information Management: Mail Services	GS50-06D-03	Certified Mail Return Receipt	3 years.	Information Management: Mail Services	GS50-06D-02	Mail Delivery and Receipt	Retain for 3 years or until completion of State Auditor's report, whichever is sooner.	Consolidation.
Information Management: Mail Services	GS50-06D-04	Postage Expenditure Report	3 years.	Information Management: Mail Services	GS50-06D-02	Mail Delivery and Receipt	Retain for 3 years or until completion of State Auditor's report, whichever is sooner.	Consolidation.



Discontinued Records Series

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<i>CORE Version 1.0</i>				<i>CORE Version 2.0</i>				
Function: Activity	Discontinued DAN	Title	Retention	Function: Activity	DAN	Title	Retention	Rationale
Information Management: Mail Services	GS50-06D-05	Postage Meter License	Destroy when obsolete or superseded plus 6 years.	Information Management: Contracts/ Agreements	GS50-01-11	Contracts, Agreements, and Warranties	Termination plus 6 years.	More accurate, function-based records series.
Information Management: Mail Services	GS50-06D-06	Postage Meter Log	3 years.	Information Management: Mail Services	GS50-06D-02	Mail Delivery and Receipt	Retain for 3 years or until completion of State Auditor's report, whichever is sooner.	Consolidation.
Information Management: Mail Services	GS50-06D-08	Private Ground Delivery Register	3 years.	Information Management: Mail Services	GS50-06D-02	Mail Delivery and Receipt	Retain for 3 years or until completion of State Auditor's report, whichever is sooner.	Consolidation.
Information Management: Mail Services	GS50-06D-07	Senders Statement And Certification Of Bulk Mailing	3 years.	Information Management: Mail Services	GS50-06D-02	Mail Delivery and Receipt	Retain for 3 years or until completion of State Auditor's report, whichever is sooner.	Consolidation.



New Records Series

Function	Activity	Disposition Authority Number (DAN)	Title	Current Approved Minimum Retention
Agency Management	Administration (General)	GS2010-001	Communications – Non-Executive	Retain for 2 years after communication received or provided, whichever is later.
Asset Management	Electronic information Systems	GS2010-002	Access Authorization (Network/System/Data) – Employee	Retain for 6 years after termination of user’s access or system no longer in use.
Asset Management	Electronic information Systems	GS2010-003	Audit Trail – Infrastructure	Retain for 1 year after date of activity.
Asset Management	Electronic information Systems	GS2010-004	Automated/Scheduled Tasks	Retain until no longer needed for agency business.
Asset Management	Electronic information Systems	GS2010-005	Helpdesk Requests	Retain for 1 year after finalization of request.
Asset Management	Electronic information Systems	GS2010-006	Network – Design and Build	Retain until no longer needed for agency business.
Asset Management	Electronic information Systems	GS2010-007	Online Content Management	Retain for 1 year after online content removed.
Asset Management	Electronic information Systems	GS2010-008	Security Monitoring – Incident	Retain for 1 year after investigation finalized.
Asset Management	Electronic information Systems	GS2010-009	Security Monitoring – No Incident	Retain until determined that no security incident has occurred.
Asset Management	Electronic information Systems	GS2010-010	System Health Monitoring	Retain until no longer needed for agency business.
Information Management	Forms and Publications	GS2010-011	Forms – Accountable	Retain for 3 years or until completion of State Auditor’s report, whichever is sooner.
Information Management	Forms and Publications	GS2010-012	Forms – Master Set	Retain until use of form ceases.
Information Management	Forms and Publications	GS2010-013	Forms and Publications – Creation	Retain until no longer needed for agency business.



New Records Series

Function	Activity	Disposition Authority Number (DAN)	Title	Current Approved Minimum Retention
Information Management	Library Services	GS2010-023	<i>Collection Control – Special Collections</i>	Retain until special collection items no longer needed for agency business then arrange for appraisal by Washington State Archives.
Information Management	Library Services	GS2010-024	<i>Special Collections</i>	Retain until no longer needed for agency business then arrange for appraisal by Washington State Archives.
Information Management	Public Disclosure	GS2010-014	<i>Public Disclosure/Records Requests - After July 23, 2005</i>	Retain for 1 year after public records request fulfilled.
Information Management	Records Conversion	GS2010-015	<i>Conversion Process – Archival Records</i>	Retain until the converted Archival records are transferred to Washington State Archives then arrange for appraisal by Washington State Archives.
Information Management	Records Conversion	GS2010-016	<i>Conversion Process – Non-Archival Records</i>	Retain until the converted Non-Archival records have been destroyed in accordance with a current, approved records retention schedule.
Information Management	Records Conversion	GS2010-017	<i>Source Records – Imaged (Archival)</i>	Retain until verification of successful conversion then arrange for appraisal by Washington State Archives.
Information Management	Records Conversion	GS2010-018	<i>Source Records – Migrated</i>	Retain until verification of successful conversion.
Information Management	Records Management	GS2010-019	<i>Conservation (Archival)</i>	Retain until the Archival records are transferred to Washington State Archives then arrange for appraisal by Washington State Archives.
Information Management	Records Management	GS2010-020	<i>Conservation (Non-Archival)</i>	Retain until the Non-Archival records have been destroyed in accordance with a current, approved records retention schedule.
Information Management	Records Management	GS2010-021	<i>Transfer of Legal Custody</i>	Retain for the life of the agency.
Records With Minimal Retention Value	-	GS50-02-01	<i>Agency Information – Routine</i>	Retain until no longer needed for agency business.
Records with Minimal Retention Value	-	GS50-02-02	<i>Agency-Generated Forms and Publications – Copies</i>	Retain until no longer needed for agency business.



New Records Series

Function	Activity	Disposition Authority Number (DAN)	Title	Current Approved Minimum Retention
Records With Minimal Retention Value	-	GS50-02-03	<i>General Information – External</i>	Retain until no longer needed for agency business.
Records with Minimal Retention Value	-	GS50-02-04	<i>Secondary (Duplicate) Copies</i>	Retain until no longer needed for agency business.
Records With Minimal Retention Value	-	GS50-02-05	<i>Transitory Records</i>	Retain until no longer needed for agency business.



Records Series Added from *Local Government General Records Retention Schedule (LGRRS Version 5.0)*

This table contains records series transferred from LGRRS, AND whose titles, retention periods and/or descriptions may have been modified, as indicated.
The Disposition Authority Numbers (DANs) remain the same.

LGRRS Version 5.0		CORE Version 2.0			
LGRRS Activity	Title	DAN	Function: Activity	Title	Changes:
Library	<i>Catalog – Library</i>	GS50-12A-01	Information Management: Library Services	<i>Catalog</i>	Title, description, retention (wording only).
Library	<i>Circulation Documentation - Library</i>	GS50-12A-02	Information Management: Library Services	<i>Circulation</i>	Title, description, retention (wording only).
Library	<i>Circulation Statistical Reports – Library</i>	GS50-12A-03	Information Management: Library Services	<i>Annual Report of Trustees</i>	Title, description, retention (reduced).
Library	<i>Shelf List/Inventory of Holdings</i>	GS50-12A-08	Information Management: Library Services	<i>Collection Control - General</i>	Title, description, retention (wording only).
		OR: GS2010-023	Information Management: Library Services	<i>Collection Control – Special Collections</i>	NEW SERIES.



Revisions to Records Series

This table contains records series whose title, description, and/or retention period have been modified, and/or which have been divided into multiple series.

CORE Version 1.0		CORE Version 2.0			
Function: Activity	Title	DAN	Function: Activity	Title	Changes:
Agency Management: Administration (General)	Correspondence	GS50-01-12 Rev. 1 OR:	Agency Management: Administration (General)	Communications – Executive	Title, description, retention (wording only).
		GS2010-001 Rev. 0	Agency Management: Administration (General)	Communications – Non-Executive	NEW SERIES.
Information Management: Electronic information Systems	Data Processing Feasibility Studies	GS50-06A-01 Rev. 1	Asset Management: Electronic information Systems	Applications – Planning and Review	Title, description, retention (increased).
Information Management: Electronic information Systems	Electronic Information System Design Documentation	GS50-06A-03 Rev. 1	Asset Management: Electronic information Systems	Applications – Technical Design and Implementation	Title, description, retention (wording only).
Information Management: Electronic information Systems	Electronic Information System and Software Backup Data	GS50-06A-02 Rev. 1	Asset Management: Electronic information Systems	Backups for Disaster Preparedness/Recovery	Title, description, retention (wording only).
Information Management: Electronic information Systems	Electronic Information System Operational Data	GS50-06A-05 Rev. 1	Asset Management: Electronic information Systems	Usage – Monitoring	Title, description, retention (wording only).
Information Management: Mail Services	Certified and Registered Mail Log	GS50-06D-02 Rev. 1	Information Management: Mail Services	Mail Delivery and Receipt	Title, description, retention (cut-off).
Information Management:	Public Disclosure Request Logs	GS50-09-13 Rev. 1	Information Management:	Public Disclosure/Records Request Logs	Title, description, retention (increased).



Revisions to Records Series

This table contains records series whose title, description, and/or retention period have been modified, and/or which have been divided into multiple series.

CORE Version 1.0		CORE Version 2.0			
Function: Activity	Title	DAN	Function: Activity	Title	Changes:
Public Disclosure			Public Disclosure		
Information Management: Public Disclosure	Public Disclosure Request Files	GS50-09-04 Rev. 1 OR:	Information Management: Public Disclosure	Public Disclosure/Records Requests – Before July 24, 2005	Title, description, retention (wording only).
		GS2010-014 Rev. 0		Public Disclosure/Records Requests – After July 23, 2005	NEW SERIES.
Information Management: Publications	Master File of Agency Publications	GS50-06F-04 Rev. 1	Information Management: Forms and Publications	Publications – Master File	Title, description, retention (wording only).
Information Management: Records Management	Source Documents Digitized by Approved EIS Application	GS50-09-14 Rev. 1	Information Management: Records Conversion	Source Records – Imaged (Non-Archival)	Title, description, retention (wording only).
Information Management: Records Management	Public Records Destruction Log	GS50-09-06 Rev. 1	Information Management: Records Management	Destruction of Public Records	Title, description, retention (wording only).
Information Management: Records Management	Records Retention Schedules - Internal	GS50-09-02 Rev. 1	Information Management: Records Management	Records Control	Title, description, retention (wording only).
Information Management: Records Management	General Records Retention Schedule	GS50-09-01 Rev. 1	Information Management: Records Management	Retention and Disposition Authorization	Title, description, retention (wording only).



QUICK CHECK: Increased Retention Periods

This table contains records series whose minimum retention periods have increased – or may result in increases due to more well-defined cut-offs.

Previous Minimum Retention:			Current Approved Minimum Retention:			
Previous DAN	Title	Retention	Current DAN	Function: Activity	Title	Retention
GS50-06A-01	Data Processing Feasibility Studies	3 years	GS50-06A-01 Rev. 1	Asset Management: Electronic information Systems	Applications – Planning and Review	Retain for 6 years after finalization of project.
GS50-06A-03	Electronic Information System Design Documentation	Fiscal/accounting systems: terminations plus 3 years. All other systems: Until all record data produced by the system pass their approved retention periods.	GS50-06A-03 Rev. 1	Asset Management: Electronic information Systems	Applications – Technical Design and Implementation	Retain until application or version is no longer needed for agency business and all records within the application have been migrated or dispositioned in accordance with a current approved records retention schedule.
GS50-06A-04	Electronic Information Maintenance Documentation	Fiscal/accounting systems: terminations plus 3 years. All other systems: Until all record data produced by the system pass their approved retention periods.	GS50-06A-03 Rev. 1	Asset Management: Electronic Information Systems	Applications – Technical Design and Implementation	Retain until application or version is no longer needed for agency business and all records within the application have been migrated or dispositioned in accordance with a current approved records retention schedule.
GS50-06A-06	Electronic Information System Post Implementation Reviews	Until termination of system or program use.	GS50-06A-01 Rev. 1	Asset Management: Electronic Information Systems	Applications – Planning and Review	Retain for 6 years after finalization of project.
GS50-09-04	Public Disclosure Request Files	Requests and responses received through July 23, 2005 are retained for 5 years. Requests received on or after July 24, 2005 are retained for 1 year.	GS50-09-04 Rev. 1	Information Management: Public Disclosure	Public Disclosure/ Records Requests – Before July 24, 2005	Retain for 5 years after public records request fulfilled.
			NEW SERIES: GS2010-014	Information Management: Public Disclosure	Public Disclosure/ Records Requests – After July 23, 2005	Retain for 1 year after public records request fulfilled.



QUICK CHECK: Increased Retention Periods

This table contains records series whose minimum retention periods have increased – or may result in increases due to more well-defined cut-offs.

Previous Minimum Retention:			Current Approved Minimum Retention:			
Previous DAN	Title	Retention	Current DAN	Function: Activity	Title	Retention
GS50-09-13	Public Disclosure Request Logs	Destroy when obsolete or superseded.	GS50-09-13 Rev. 1	Information Management: Public Disclosure	Public Disclosure/ Records Request Logs	Retain for 3 years after date of last entry.
GS50-06D-01	Bulk Mailing Permit	6 years.	GS50-01-11 Rev. 0	Agency Management: Contracts/Agreements	Contracts, Agreements, and Warranties	Termination plus 6 years.
LGRRS Library GS50-12A-08	Shelf List/ Inventory of Holdings	Destroy when superseded plus completion of State Auditor's examination report	GS50-12A-08 Rev. 1	Information Management: Library Services	Collection Control - General	Retain for 3 fiscal years or until completion of State Auditor's report, whichever is sooner.
			GS2010-023 Rev. 0	Information Management: Library Services	Collection Control – Special Collections	Retain until special collection items no longer needed for agency business <i>then</i> arrange for appraisal by Washington State Archives.



QUICK CHECK: Decreased Retention Periods

This table contains records series whose minimum retention periods have decreased.

Previous Minimum Retention:			Current Approved Minimum Retention:			
DAN	Title	Retention	DAN	Function: Activity	Title	Retention
GS50-01-35 Discontinued	<i>Telephone Logs and Usage Detail Reports</i>	3 years	GS50-06A-05 Rev. 1	Asset Management: Electronic Info Systems	<i>Usage Monitoring</i>	Retain for 1 year after activity.
LGRRS Library	<i>Circulation Statistical Reports – Library</i>	5 years	GS50-12A-03 Rev. 1	Information Management: Library Services	<i>Annual Report of Trustees</i>	Retain for 3 years after report submitted.