



REVISION GUIDE

SUMMARY OF CHANGES

- 13 new records series.
 - Minimum retention changed from 3 years to *4 years or audit* for 14 records series at request of Office of the State Auditor.
 - 13 records series have had their archival designations modified by the State Archivist. (10 of the records series were previously designated “Non-Archival” with minimum retention requirements of “PERMANENT”.)
 - 48 additional records series have been revised to provide better clarity and make easier for the end-user to apply.
 - 43 records series covered elsewhere in this schedule or in the *Local Government Common Records Retention Schedule (CORE)* have been discontinued.
 - New standard formatting applied, including:
 - ✓ Archival and Essential designations provided.
 - ✓ Cut-off language refined and aligned with CORE standards.
- NOTE:** If the minimum retention period has increased or decreased, the change is listed in one of the “REVISED RECORDS SERIES” tables, below. If the improved language does NOT cause a change in the retention period, the series are not listed in the table(s).



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Abbreviations Used in this Guide:

WSA = Washington State Archives
SAO = Office of the State Auditor
OSPI = Office of the Superintendent of Public Instruction

All current, approved records retention schedule can be accessed on our website at:

<http://www.sos.wa.gov/archives/RecordsRetentionSchedules.aspx>

For assistance and advice in applying records retention schedules,
please contact Washington State Archives at: recordsmanagement@sos.wa.gov
or contact your Regional Archivist.



REVISED RECORDS SERIES – STATE AUDITOR (SAO) REQUEST

At the request of the SAO, the minimum retention period for the following records series has been increased to:

“Retain for 4 years after end of fiscal year or until completion of SAO examination report, whichever is sooner, then Destroy”.

DAN	Page # Ver 7.2 / Ver 8.0	Title	Version 7.2 Retention and Disposition Action
SD51-05G-07	p. 16/18	<i>Bus Schedule For All Schools</i>	3 years or until completion of SAO examination report.
SD51-05G-12	p. 16/18	<i>Fuel/Oil Records for Individual Buses and Other Vehicles</i>	3 years.
SD51-03E-28	p. 25/23	<i>Payroll Status Sheets For Districts Not Using Personnel Action Request Forms</i>	3 years after completion of grant.
SD51-06A-04	p. 29/26	<i>Course Additions, Deletions, And Changes</i>	3 years.
SD51-06A-10	p. 31/28	<i>Instructional Materials Subject File</i>	3 years.
SD51-09A-05	p. 33/30	<i>Parent/Legal Guardian Declaration Of Intent</i>	3 years or until completion of SAO examination report.
SD51-05F-09	p. 39/49	<i>Student Locator Cards/Class Schedules</i>	3 years or until completion of SAO examination report.
SD51-08-01	p. 48/50	<i>Catering Requests</i>	3 years or until completion of SAO examination report.
SD51-08-03	p. 48/50	<i>Food Service Orders</i>	3 years or until completion of SAO examination report.
SD51-08-05	p. 49/51	<i>Meal And Milk Count Reports And Documentation</i>	3 years or until completion of SAO examination report.
SD51-08-06	p. 49/52	<i>Meal Ticket/Credit Log</i>	3 years or until completion of SAO examination report.
SD51-08-07	p. 49/52	<i>Meal Tickets</i>	3 years or until completion of SAO examination report.
SD51-08-11	p. 50/53	<i>Stock Control Records</i>	3 years or until completion of SAO examination report.
SD51-08-12	p. 50/54	<i>Stock Inventory Report Summary</i>	3 years or until completion of SAO examination report.



REVISED RECORDS SERIES – STATE ARCHIVIST REQUEST
At the request of the State Archivist, the following records have been designated as
“Archival – Permanent Retention” or “Archival – Appraisal Required”

DAN & Page #	Title	Version 7.2 Retention & Designation	Version 8.0 Title (if different)	Version 8.0 Minimum Retention (if different)	Additional Changes
SD51-05-05 Ver. 7.2 p. 6 Ver. 8.0 p. 5	<i>Descriptive Guide to School District Administration and Buildings</i>	PERMANENT (Archival – Appraisal Required)	No change.	Retain for 6 years after superseded then transfer to WSA for permanent retention.	
SD51-01-52 Ver. 7.2 p. 7 Ver. 8.0 p. 6	<i>Historical Records, Materials & Artifacts that should be Retained for Commemorative Events and Displays.</i>	PERMANENT (Archival – Appraisal Required)	No change.	Retain until no longer needed for agency business then Transfer to WSA for permanent retention.	Now includes student newspapers; excludes interscholastic awards covered by SD51-20-02.
SD51-11-02 Ver. 7.2 p. 17 Ver. 8.0 p. 19	<i>Boundary Records</i>	PERMANENT (Archival – Appraisal Required)	<i>Educational Service District Boundary Records</i>	Retain for 6 years after superseded then Transfer to WSA for permanent retention.	
SD51-06A-05 Ver. 7.2 p. 30 Ver. 8.0 p. 27	<i>Curriculum Summaries and Guides</i>	PERMANENT (Archival – Appraisal Required)	No change.	Retain until no longer needed for agency business then Transfer to WSA for permanent retention.	
SD51-06A-08 Ver. 7.2 p. 30 Ver. 8.0 p. 28	<i>Graduation Requirements Statements</i>	PERMANENT (Archival – Appraisal Required)	<i>Graduation Requirements</i>	Retain until no longer needed for agency business then Transfer to WSA for permanent retention.	Description enhanced; title shortened.
SD51-06A-10 Ver 7.2 p. 31 Ver 8.0 p. 28	<i>Instructional Materials Subject File</i>	3 years	No change.	Retain for 4 years after end of fiscal year or until completion of SAO examination report, whichever is sooner then Transfer to WSA for appraisal and selective retention.	Updated DAN reference in description. Also changed retention to uniform SAO language and designation to Archival – Appraisal Required.
SD51-09A-01 Ver 7.2 p. 33 Ver 8.0 p. 30	<i>List of Services Provided by the School District</i>	6 years	No change.	Retain until no longer needed for agency purposes then Transfer to WSA for appraisal and selective retention.	



REVISED RECORDS SERIES – STATE ARCHIVIST REQUEST
At the request of the State Archivist, the following records have been designated as
“Archival – Permanent Retention” or “Archival – Appraisal Required”

DAN & Page #	Title	Version 7.2 Retention & Designation	Version 8.0 Title (if different)	Version 8.0 Minimum Retention (if different)	Additional Changes
SD51-20-10 Ver 7.2 p. 36 Ver 8.0 p. 46	Graduate List	PERMANENT – Potential Archival Value	No change.	Retain for 6 years after current school year then Transfer to WSA for permanent retention.	
SD51-20-02 Ver 7.2 p. 41 Ver 8.0 p. 58	Athlete/Team Achievement Records – WIAA	6 years	Interscholastic Activities - Achievements	Retain for 6 years after end of school year then Transfer to WSA for appraisal and selective retention.	Title and description enhanced to include all interscholastic activity achievements, including athletics, arts, science, debate, DECA, FFA, etc. (Previously uncovered records.)
SD51-05-02 Ver. 7.2 p. 56 Ver. 8.0 p. 14	Boundary Records	PERMANENT (Archival – Appraisal Required)	School Service Boundary Records	Retain for 6 years after end of calendar year then Transfer to WSA for permanent retention.	
SD51-05-10 Ver. 7.2 p. 56 Ver. 8.0 p. 13	Annual High School Report for Standards and Accreditation	PERMANENT 1 copy potential archival value	Basic Education Act Compliance	Retain for 6 years after end of calendar year then Transfer to WSA for permanent retention.	Title & description enhanced to clarify this covers school “approval”, which is mandatory. (Records relating to voluntary “accreditation” are covered by SD51-05-11.)
SD51-05-06 Ver. 7.2 p. 57 Ver. 8.0 p. 13	Official District Negotiated School Calendars	PERMANENT (Archival – Appraisal Required)	No change.	Retain for 6 years after end of calendar year then Transfer to WSA for permanent retention.	Changed designation to Archival – Permanent Retention to relieve school of burden of retaining permanently.
SD51-05-11 Ver. 7.2 p. 57 Ver. 8.0 p. 13	Report of Evaluation of Accreditation	PERMANENT – 1 copy potential archival value	Accreditation	Retain for 6 years after end of calendar year then Transfer to WSA for permanent retention.	Consolidation of all records relating to accreditation, which is voluntary (vs. “approval”, which is mandatory, and covered by SD51-05-10). Covers records from discontinued series SD51-06A-01 and SD51-05-01.



NEW RECORDS SERIES

Function: Activity	Title and Description	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Agency Mgmt: Community Relations	Photo/Medial Release – Denial of Permission	SD2012-062 p. 7	Retain until end of school year or until superseded, whichever is later, then destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Denial of permission does not have the legal value of granted permission. School year is a more appropriate retention.
Agency Mgmt: Reporting - Student Health and Safety	Reporting – Student Health and Safety	SD2012-063 p. 12	Retain for 4 years after submission of report then destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Previously uncovered records.
Student Learning: Teaching Records	Alternative Learning Experience (ALE) – Student Learning Plan	SD2012-074 p. 33	Retain for 4 years after end of calendar year or until completion of SAO examination report, whichever is sooner, then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Previously uncovered records.
Student Admin: Assignment	Homeless Child and Youth Identification/ Eligibility Determination	SD2012-064 p. 36	Retain for 6 years after end of school year then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Previously uncovered records.
Student Admin: Assignment	Immunization/ Exemption Reporting Compliance	SD2012-065 p. 37	Retain for 6 years after end of school year then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Previously uncovered records.
Student Admin: Assignment	Immunization-Related Exclusions	SD2012-066 p. 37	Retain for 3 years after date student excluded from school then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Previously uncovered records regulated by RCW 28A.210.120 .
Student Admin: Assignment	Student Transfer/ Assignment Requests – Not Granted	SD2012-067 p. 38	Retain for 3 years after denial of request then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Denied requests for inter-district transfers (to or from) may be appealed to the Superintendent of Public Instruction (OSPI) in accordance with RCW 28A.225.230 . OSPI retains appeals records for 10 years.
Student Admin: Student Records	Authorization For/Release of Student Records – Prior Consent or Documentation Required	SD2012-068 p. 45	Retain until the education records of the student are no longer retained then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Created new series to cover FERPA requirement to retain disclosure records where prior consent is required (and in some cases where prior consent is not required) as long as the education records are retained.



NEW RECORDS SERIES

Function: Activity	Title and Description	NEW DAN	Minimum Retention and Disposition	Designations	Rationale
Student Admin: Student Records	Official Student Record – Change Request Denied	SD2012-069 p. 46	Retain for 6 years after request denied then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OFM	Previously uncovered records. If change is approved, records are retained with Official Student Record, which is covered by SD51-05F-10.
Student Admin: Student Records	Student Identification Photos	SD2012-070 p. 49	Retain until no longer needed for agency business then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OFM	Previously uncovered records.
Student Mgmt: Health Services	Health Care/Services Provided to Students	SD2012-071 p. 55	Retain for 8 years after last provision of health-related services then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Created new series to consolidate and clarify several existing series, which are now discontinued (SD51-20-05, SD51-20-06, SD51-09-07 and SD51-09-09). Minimum retention reflects RCW 4.16.350 .
Student Mgmt: Health Services	Medication Errors	SD2012-072 p. 56	Retain for 8 years after end of school year or 8 years after investigation completed/matter resolved, whichever is later then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Previously uncovered records. Per RCW 4.16.350 , the statute of limitations for the commencement of actions for injuries resulting from health care or related services is 8 years.
Student Mgmt: Health Services	Medication Inventory	SD2012-073 p. 57	Retain for 1 year after medications returned/ destroyed/delivered to law enforcement agency then Destroy.	NON-ARCHIVAL NON-ESSENTIAL OPR	Previously uncovered records.



REVISED RECORDS SERIES - GENERAL

The records series listed below have been revised; changes and rationale are provided. (List is in *SCHOOLS Ver. 7.2* page order.)

Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-20-08 Ver 7.2 p.8 Ver 8.0 p. 7	Photo/Media Release Form – External	3 years	Photo/Media Release – External Usage	Retain for 6 years after end of school year <i>then</i> Destroy.	Clarified title and description. Removed “denial of permission” from description, which is covered by new series SD2012-062. Increased retention to substantiate district’s legal right to allow external parties to record student image(s). (Signed release should be retained for period of agency’s liability. Statute of limitations for written contract is 6 years. RCW 4.16.040.)
SD51-20-09 Ver 7.2 p.8 Ver 8.0 p. 7	Photo/Media Release Form – Internal	Retain for current school year.	Photo/Media Release – School/District Usage	Retain for 6 years after image/recording no longer being used <i>then</i> Destroy.	Clarified title and description. Removed “denial of permission” from description, which is covered by new series SD2012-062. Increased retention to substantiate district’s legal right to use student image(s). (Signed release should be retained for period of agency’s liability. Statute of limitations for written contract is 6 years. RCW 4.16.040.)
SD51-01-35 Ver 7.2 p.8 Ver 8.0 p. 7	Public Research Access Request	Resolution of request plus 3 years	No change.	Retain for 3 years after resolution of request <i>then</i> Destroy.	Exclusion added for student records research covered by SD2012-068 or SD51-05F-02.
SD51-01-39 Ver 7.2 p.8 Ver 8.0 p. 8	Public Research Access Request Log	Last entry in log plus 3 years		Retain for 3 years after last entry in log <i>then</i> Destroy.	
SD51-07-08 Ver 7.2 p. 11 Ver 8.0 p. 9	Demographic and Enrollment Projections	3 years	No change.	Retain for 3 years after end of fiscal year <i>then</i> Destroy.	Provided cutoff.
SD51-01-37 Ver 7.2 p. 12 Ver 8.0 p. 11	Reporting – Office of the Superintendent of Public Instruction (OSPI) – General	Retain for 4 years after submission of report or completion of SAO examination report, whichever is sooner <i>then</i> Destroy.	Reporting – Required by Regulatory Agencies	No change.	Added “supporting documentation” to the description. Revised bulleted item “Absence report” for clarity, as follows: <ul style="list-style-type: none"> • Apportionment, enrollment count, P-223, attendance/absence report, etc.;



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Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-05G-04 Ver 7.2 p. 15 Ver 8.0 p. 17	Bus Conditions Checklist	1 year	No change.	Retain for 1 year after end of school year <i>then</i> Destroy.	Provided cutoff.
SD51-05G-06 Ver 7.2 p. 16 Ver 8.0 p. 18	Bus Operations Daily Log	6 years	No change.	Retain for 6 years after end of school year <i>then</i> Destroy.	Provided cutoff.
SD51-12-05 Ver 7.2 p. 18 Ver 8.0 p. 10	Regional Drug and Alcohol Surveys	6 years after close of fiscal year – Potential Archival Value	Healthy Youth Survey Results	Retain for 6 years after end of fiscal year then Transfer to WSA for appraisal and selective retention.	Updated title (to match current program), provided description, and updated retention language.
SD51-02A-04 Ver 7.2 p. 22 Ver 8.0 p. 22	Budget Revision Requests	6 years	No change.	Retain for 6 years after end of fiscal year <i>then</i> Destroy.	Provided cutoff.
SD51-03C-17 Ver 7.2 p. 24 Ver 8.0 p. 10	Survey of Parents or Legal Guardians Living or Working on Federal Property (Public Law 81-874 – Not Eligible	Retain until submittal of the application	Impact Aid Programs – Child Not Eligible	Retain until submittal of the application for federal impact aid then Destroy.	Refined title to match federal statute and provided description. Series excludes surveys where children <u>are</u> eligible, which are covered by GS2011-183, Financial Transactions – Bond, Grant and Levy Projects . (Grant applications...for grant funds ... received by the local government agency.)
SD51-01-46 Ver 7.2 p. 27 Ver 8.0 p. 24	Signature of Receipt Record	1 year	No change.	Retain for 1 year after end of school year <i>then</i> Destroy.	Provided cutoff.
SD51-04G-01 Ver 7.2 p. 28 Ver 8.0 p. 15	Approved In-Service Education	7 years	Agency-Provided Training – In-Service Education	Retain for 7 years after in-service program completed then Destroy.	Moved to “Training” section. Title and description enhanced to align with CORE series for other types of agency-provided training. Statute referenced; description and cut-off reflect WAC requirements.
SD51-04G-03 Ver 7.2 p. 28 Ver 8.0 p. 25	List of HIV and HBV Trained Employees	30 years	List of HIV/AIDS and HBV Trained Employees	Retain for 30 years after end of school year then Destroy.	Title, description and cut-off enhanced; references added.



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Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-06A-02 Ver 7.2 p. 29 Ver 8.0 p. 26	Categorical Program Files	3 years after completion of grant audit or for period required by grant or program	No change.	Retain until completion of SAO examination report and retain for period required by grant or program, whichever is later then Destroy.	Cut-off clarified. Note removed. (ALL records which become involved in an audit or litigation must be retained until audit or litigation is resolved, as stated on the front page of the records retention schedule.)
SD51-06A-03 Ver 7.2 p. 29 Ver 8.0 p. 5	Community Challenges of Instructional Materials	5 years	No change.	Retain for 5 years after end of school year then Destroy.	Moved to "Community Relations" section. Cut-off provided.
SD51-06A-11 Ver 7.2 p. 30 Ver 8.0 p. 27	Curriculum Waiver Requests	5 years	No change.	Retain for 5 years after end of school year then Destroy.	Description enhanced. Cut-off provided. (This record supports grade documentation.)
SD51-06A-06 Ver 7.2 p. 30 Ver 8.0 p. 27	Essential Academic Learning Requirements (EALR) Program Files	Destroy when superseded	Essential Academic Learning Requirements (EALR) – Program Files	Retain until superseded then Destroy.	Title slightly modified for conformity with companion series. SD51-06A-06 excludes EALR information verification reports submitted to OSPI, which are covered by SD51-01-37.
SD51-06A-07 Ver 7.2 p. 30 Ver 8.0 p. 28	Essential Academic Learning Requirements (EALR) Program Files Results	Destroy after compilation and issuance of test data.	Essential Academic Learning Requirements (EALR) – Program Results	Retain until test data compiled and issued then Destroy.	
SD51-06A-09 Ver 7.2 p. 30 Ver 8.0 p. 28	Individual Essential Academic Learning Reports	Destroy after compilation and issuance of test data	Essential Academic Learning Requirements (EALR) – Individual Reports	Retain until test data compiled and issued then Destroy.	
SD51-06A-13 Ver 7.2 p. 31 Ver 8.0 p. 35	Student Assessment and Placement Program Case Files	1 year after screening	No change.	Retain for 1 year after placement determined then Destroy.	Cut-off clarified.



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Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-06A-16 Ver 7.2 p. 32 Ver 8.0 p. 35	Student Testing – Group Reports	5 years	Standardized Tests – Group Reports	Retain for 5 years after date of report <i>then</i> Destroy.	Titles and descriptions modified for clarification. These series cover only <i>standardized tests</i> . Retention cut-offs and notes also provided/enhanced. Increased retention of individual student results from 2 to 3 years to align with cumulative folder. Clarified cut-off to specify graduation or withdrawal from district (not <i>school</i>).
SD51-06A-17 Ver 7.2 p. 32 Ver 8.0 p. 35	Student Testing – Individual Student Report	2 years	Standardized Tests – Individual Student Reports	Retain for 3 years after student graduates or withdraws from district <i>then</i> Destroy.	
SD51-06A-18 Ver 7.2 p. 32 Ver 8.0 p. 35	Student Testing – Primary Record	90 days	Standardized Tests – Student Records	Retain for 90 days after scores/results released to students or parents <i>then</i> Destroy.	
SD51-09A-02 Ver 7.2 p. 33 Ver 8.0 p. 30	List of Students Participating in Home-Based Instruction	6 years	No change.	Retain for 6 years after end of school year then Destroy.	Cut-off clarified.
SD51-09A-03 Ver 7.2 p. 33 Ver 8.0 p. 30	Notice of Transfer of Home-Based Student to School/District	Retain for 2 years after student graduates or withdraws then destroy.	Transfer of Home-Based Student to School/District	Retain for 3 years after student graduates or withdraws from district then Destroy.	Title modified to encompass all records documenting home-based student transfer to school/district. Now covers placement/evaluation test results from discontinued series SD51-09A-06. Increased retention from 2 to 3 to align with cumulative folder. Clarified cut-off language to “graduates or withdraws from district ” (not “school”).
SD51-10-02 Ver 7.2 p. 34 Ver 8.0 p. 31	Patient Case Files	10 years after last visit of patient; written confirmation received from a patient’s health care professional that “forwarded” records have been received; or patient reaches 21 years of age, whichever is longer.	Skills Center Patient Case Files	Retain for 8 years after last provision of health-related services then Destroy.	Modified title for clarity and changed cut-off to accommodate RCW 4.16.350 (statute of limitations for the commencement of actions for injuries resulting from health care or related services is 8 years).



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Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-10-03 Ver 7.2 p. 34 Ver 8.0 p. 31	Skills Center Student Time Log/Sheet	3 Years or until completion of SAO examination report.	No change.	Retain for 5 years after end of fiscal year then Destroy.	Minimum retention increased to 5 years because this record supports grade documentation pursuant to WAC 180-51-061 .
SD51-05I-04 Ver 7.2 p. 35 Ver 8.0 p. 32	Report for Student Not Assigned to the Special Education Program	Determined ineligible plus 5 years	Special Education Program – Student Not Eligible	Retain for 5 years after student determined to be ineligible then Destroy.	Modified titles to align with each other and updated retention language, notes and references.
SD51-05I-02 Ver 7.2 p. 35 Ver 8.0 p. 32	Special Education Student History File	Separation from program plus 6 years	Special Education Program – Student History File	Retain for 6 years after separation from program then Destroy.	
SD51-05I-03 Ver 7.2 p. 35 Ver 8.0 p. 32	Special Education Student History File Disposition Notice Record	6 years – see remarks	Special Education Program – Student History File Disposition Notice	Retain for 6 years after final notice sent then Destroy.	
SD51-05F-02 Ver 7.2 p. 36 Ver 8.0 p. 44	Authorization for Release of Student Records	3 years after records released	Authorization For/Release of Student Records – Prior Consent Not Required	Retain for 3 years after request received or records released, whichever is later, then Destroy.	Title modified; description provided; cut-off clarified. This is a companion series to new series SD2012-068, Authorization For/Release of Student Records – Prior Consent or Documentation Required , which covers disclosure of records where prior consent <u>is</u> required and/or where state or federal law requires retention of records documenting requests – <i>even when consent is not required</i> .
SD51-05F-03 Ver 7.2 p. 36 Ver 8.0 p. 45	Confidential Reports (A.K.A. Guidance Reports or Supplementary Reports)	2 years after student graduates or withdraws	No change.	Retain for 3 years after student graduates or withdraws from district then Destroy.	Increased retention of reports from 2 to 3 years to align with cumulative folder and to better enable schools to provide records until (most) students reach age 21. Provides (more) assurance that returning students’ records are still in-district. (Many students leave district between elementary and high school.) Clarified cut-off to specify graduation or withdrawal from district (not <i>school</i>).



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Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-05F-05 Ver 7.2 p. 37 Ver 8.0 p. 43	<i>Request for Approval to Test for Certificate of Educational Competence (GED)</i>	Destroy when obsolete or superseded	<i>General Educational Development (GED) Test – Eligibility</i>	Retain until no longer needed for agency business then Destroy.	Updated title and description to provide better guidance. Now includes records from discontinued series SD51-05F-01 and SD51-05F-04.
SD51-05F-11 Ver 7.2 p. 37 Ver 8.0 p. 47	<i>School Registers</i>	Obsolete record eligible for disposition unless there is no student transcript- Potential archival value	No change.	Retain until no longer needed for agency business then Transfer to WSA for appraisal and selective retention.	Clarified retention cut-off and added remark to description.
SD51-05F-10 Ver 7.2 p. 37 Ver 8.0 p. 46	<i>Official Student Record</i>	Retain for 100 years after student graduates or withdraws then Destroy.	No change.	No change.	Description enhanced to provide better guidance to agencies.
SD51-05F-07 Ver 7.2 p. 38 Ver 8.0 p. 48	<i>Student Cumulative Folder (A.K.A. Student File Folder)</i>	2 years after student graduates or withdraws	<i>Student Cumulative Folder (Student File Folder)</i>	Retain for 3 years after student graduates or withdraws from district then Destroy.	Retention increased to better enable schools to provide records until (most) students reach age 21 and to provide (more) assurance that returning students' cumulative folders are still in-district. (Many students leave district between elementary and high school.) Provides convenient place to retain test scores and other assessment data for placement of returning students – and for sending (copies) to other district(s). Enhanced description for clarity.
SD51-05F-08 Ver 7.2 p. 39 Ver 8.0 p. 49	<i>Student Discipline Files</i>	3 years after the incident	N/A	Retain for 3 years after matter resolved or student graduates or withdraws, whichever is sooner then Destroy.	Retention cut-off enhanced to provide better guidance to agencies.



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Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-06E-02 Ver 7.2 p. 40 Ver 8.0 p. 33	Grade Documentation – Secondary	5 years	No change.	Retain for 5 years after end of school year then Destroy.	Added “senior projects” to description.
SD51-03-15 Ver 7.2 p. 41 Ver 8.0 p. 59	Athletic and Activity Surveys	5 years	Interscholastic Activities – Self-Evaluation Surveys	Retain for 6 years after end of school year then Destroy.	Title and description enhances; retention increased to synchronize retention requirements.
SD51-03-04 Ver 7.2 p. 41 Ver 8.0 p. 59	Athletic Eligibility Records	3 years	Interscholastic Activities - Eligibility	Retain for 3 years after end of school year then Destroy.	Enhanced title to include eligibility records for any/all interscholastic activities. (Includes records from discontinued series SD51-03-10, League Registration Forms.)
SD51-20-04 Ver 7.2 p. 48 Ver 8.0 p. 51	HACCP Plan(Hazard Analysis of Critical Control Points Plan)	6 years	HACCP (Hazard Analysis & Critical Control Points) Plan	Retain for 6 years after obsolete or superseded then Destroy.	Modified title and description. Provided federal statute references.
SD51-09-01 Ver 7.2 p. 51 Ver 8.0 p. 34	Application for Home/Hospital Tutoring	6 years	Home/Hospital Tutoring	Retain for 6 years after application received or service provided, whichever is later then Destroy.	Title, description and cut-off enhanced. Series moved to Teaching activity.
SD51-09-02 Ver 7.2 p. 51 Ver 8.0 p. 36	Certificate of Immunization Status (CIS)	Destroy after termination of enrollment	Immunization Status	Retain until student graduates or withdraws then Destroy.	Title, definition and cut-off enhanced for clarity. Scope broadened to reflect updates to state statute.
SD51-09-03 Ver 7.2 p. 51 Ver 8.0 p. 12	Child Abuse Reports	6 years	Reporting – Suspected Child Abuse	Retain for 6 years after submission of report then Destroy.	Moved to “Reporting – Student Health and Safety” section. Title, description, and cut-off enhanced to better align with CORE series for other types of reporting.
SD51-09-05 Ver 7.2 p. 51 Ver 8.0 p. 56	Health Room Registry	8 years after last entry	Health/Nurse Room Registry	Retain for 8 years after last entry then Destroy.	Title and description enhanced to provide better guidance.
SD51-05J-02 Ver 7.2 p. 53 Ver 8.0 p. 38	Boundary Exceptions	Current school year plus 6 years	Student Assignment /Transfer Requests – Granted	Retain for 6 years after end of school year then Destroy.	Title and description updated and enhanced to reflect 1990’s Learning by Choice requirements pursuant to chapter 28A.225 RCW .



REVISED RECORDS SERIES - GENERAL

The records series listed below have been revised; changes and rationale are provided. (List is in *SCHOOLS Ver. 7.2* page order.)

Version 7.2 DAN	Version 7.2 Title	Version 7.2 Retention	Version 8.0 Title (if different)	Version 8.0 Retention (if different)	Change and/or rationale
SD51-05J-04 Ver 7.2 p. 53 Ver 8.0 p. 38	Enrollment	Retain for 2 years after student leaves/withdraws from school/district & completion of SAO report then Destroy.	Student Registration	Retain for 3 years after superseded or 3 years after student graduates or withdraws from school/district, whichever is sooner, then Destroy.	Enhanced title and description to provide more clarity, including reference to students who register but never actually attend. Modified retention to allow destruction of superseded registration forms, since they are updated annually, and increased to 3 years to align with new cumulative folder retention requirement.
SD51-05J-06 Ver 7.2 p. 54 Ver 8.0 p. 37	Student Assignment Case Files	3 years	Student Assignment	Retain for 6 years after end of school year then Destroy.	Modified title and increased retention. Per RCW 4.16.40 , the statute of limitations for the commencement of actions upon a contract in writing, or liability express or implied arising out of a written agreements is 6 years. (Claims relating to school or program assignment are not uncommon.) Exclusion for records relating to student transfers covered by SD51-05J-02 and SD2012-067.
SD51-05G-13 Ver 7.2 p. 55 Ver 8.0 p. 60	Improper Conduct on the Bus Notice	1 year	Improper Student Conduct on the Bus	Retain for 1 year after incident then Destroy.	Title and description enhanced; "student" added for clarity.
SD51-05-13 Ver. 7.2 p. 57 Ver. 8.0 p. 14	Statements of Graduation Requirements	PERMANENT (Archival – Appraisal Required)	Superintendent of Schools (General)	Retain for 6 years after end of calendar year then Transfer to WSA for appraisal and selective retention.	Statement of graduation requirements is covered by SD51-06A-08. This series has been revised to cover the Superintendent's official statement of/to the graduating class <i>as well as</i> any/all other records of the Superintendent that are not covered by other records series.



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Discontinued DAN Ver 7.2	Ver. 7.2 Function: Activity	Version 7.2 Title	Version 7.2 Retention	Schedule Function: Activity	Use:	Title	Retention	Rationale
SD51-20-01 p. 5	Agency Mgmt: Boards, Councils and Committees	Associated Student Body (ASB) – Minutes	PERMANENT	CORE Agency Mgmt. Meetings and Hearings	GS50-05A-13 p. 37	Meetings – Governing/ Executive	Retain for 6 years after end of calendar year then transfer to WSA for permanent retention.	Minutes covered in CORE. Reduction in duplication.
SD51-01-08 p. 5	Agency Mgmt: Boards, Councils and Committees	Associated Student Body (ASB) – Bylaws	PERMANENT (Archival – Appraisal Required)	CORE Agency Mgmt. Planning, Mission and Charter	GS50-05A-01 p. 10	Charter and Bylaws – Adopted	Retain until superseded then transfer to WSA for permanent retention.	
SD51-06F-03 p. 9	Agency Mgmt: Community Relations	School Bulletins and Newspapers	Retain until appraised by WSA	CORE Agency Mgmt.: Community Relations	GS50-06F-04 p. 137	Publications – Master Set	Retain until no longer needed for agency business then arrange for appraisal by WSA.	Bulletins, newspapers, handbooks, calendars are all publications – which are covered in CORE. Reduction in duplication.
SD51-06F-04 p. 9		Student Handbook/Calendar	Retain until appraised by WSA					
SD51-02-30 p. 10	Agency Mgmt: Contracts/ Agreements	Vendor Files	3 years or until completion of SAO examination report.	CORE Financial Mgmt.: Purchasing	GS50-08A-02 p. 104	Consultant and Contractor Rosters	Destroy when superseded plus 6 years	Vendor files are covered in CORE. Reduction in duplication.
					GS50-08A-01 p. 104	Bids and Proposals – Successful	Retain for 6 years after completion of purchase or fulfillment of contract then Destroy.	
					GS50-08A-11 p. 104	Bids and Proposals – Unsuccessful	Retain for 4 years after end of fiscal year then Destroy.	
SD51-01-51 p. 13	Agency Mgmt: Risk Mgmt. /Insurance	Emergency Information Form for Students and Staff	Retain for current school year.	CORE: Agency Mgmt: Emergency Planning, Response and Recovery	GS2012-024 p. 25	Emergency/Disaster Preparedness – Contact Information	Retain until obsolete or superseded then Destroy.	Record common to many local government agencies.



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Discontinued DAN Ver 7.2	Ver. 7.2 Function: Activity	Version 7.2 Title	Version 7.2 Retention	Schedule Function: Activity	Use:	Title	Retention	Rationale
SD51-05C-32 p. 13	Agency Mgmt: Risk Mgmt. /Insurance	Insurance Certificates	Expiration of certificate plus 3 years	CORE Agency Mgmt. Contracts/Agreements	GS50-01-11 p. 19	Contracts and Agreements – General	Retain for 6 years after completion of transaction or termination/expiration of instrument then Destroy.	Insurance certificates covered in CORE. Reduction in duplication.
SD51-11-01 p. 17	ESD: Administration	Board and Regional Committee Election Certificates	Retain for the life of the agency	CORE Agency Mgmt: Elections (Elected Officials, Initiatives and Referenda)	GS2012-018 p. 21	Certification of Election – By Regulatory Agency	Retain until no longer needed for agency business then Destroy.	Elections certified by regulatory agencies, such as OSPI.
					GS2012-019 p. 22	Elections – Held and Certified by the Local Gov’t Agency (Official Results)	Retain for 6 years after end of calendar year then Transfer to WSA for permanent retention.	Internal elections.
SD51-11-03 p. 17	ESD: Administration	County Superintendent of Schools Records	These records are archival and should be transferred to the nearest Regional Archives Branch.	CORE Agency Mgmt. Meetings and Hearings	GS50-05A-13 p. 37	Meetings – Governing/ Executive	Retain for 6 years after end of calendar year then transfer to WSA for permanent retention.	Minutes covered in CORE. Reduction in duplication.
					GS50-01-12 p. 6	Communications – Governing/ Executive	Retain for 2 years after communication received or provided, whichever is later then Transfer to WSA for appraisal and selective retention.	Executive communications covered in CORE. Reduction in duplication.
SD51-13-01 p. 18	ESD: Instructor/Teacher Curriculum and Instruction	Class/Workshop Records	6 years after close of fiscal year.	SCHOOLS Agency Mgmt: Training	SD51-04G-01 p. 15	Agency-Provided Training – In-Service Education Programs	Retain for 7 years after training provided then Destroy.	Consolidation of all “in-service education” training provided by the agency. WAC 181-85-205.
SD51-12-01 p. 18		Clock Hour Records	7 years					
SD51-12-02 p. 18		In-Service Attendance Reports	6 years after close of fiscal yr					
SD51-12-04 p. 18		Program Applications	6 years after close of fiscal yr					



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Discontinued DAN Ver 7.2	Ver. 7.2 Function: Activity	Version 7.2 Title	Version 7.2 Retention	Schedule Function: Activity	Use:	Title	Retention	Rationale
SD51-14-01 p. 20	ESD: Teacher Certification	Certificate Application Fees Receipt Book	6 years after close of fiscal year	CORE Financial Mgmt: Financial Transactions - General	GS2011-184 p. 91	Financial Transactions – General	Retain for 6 years after end of fiscal year then Destroy.	Consolidation of all financial transaction records into this CORE series. (Bond, grant and levy-funded transactions are covered by GS2011-183.)
SD51-14-03 p. 20		Certification Fee Report – Quarterly/ Annual	6 years after close of fiscal year					
SD51-02-27 p. 21		Student Fee and Fine Statements	3 years					
SD51-03C-16 p. 23	Financial Mgmt: Grants	Survey of Parents or Legal Guardians Living or Working on Federal Property (Public Law 81-874 – Eligible	Retain for 4 years after submission of report then Destroy.	CORE Financial Mgmt: Reporting	GS2011-183 p. 90	Financial Transactions – Bond, Grant and Levy Projects	Retain for 6 years after final bond payment or 6 years after completion of levy/ grant project or terms of grant, agreement whichever is later then Destroy.	Covered by CORE series. Consolidation.
SD51-03C-14 p. 23	Financial Mgmt: Grants	Non-Federal and/or Non-State Grants Issued – Successful Application Administration Files	3 years after completion of grant.	CORE Financial Mgmt: Accounting	GS2011-183 p. 90 OR	Financial Transactions – Bond, Grant and Levy Projects	Retain for 6 years after final bond payment or 6 years after completion of levy/ grant project or terms of grant, agreement whichever is later then Destroy.	All grant records have been consolidated in CORE to reduce duplication. (Note: Impact aid program surveys where the child is not eligible, are covered by SD51-03C-17.)
SD51-03C-15 p. 23		State Grants Issued – Successful Application Administration	6 years after completion of grant audit or retain for period required by grant program.	CORE Financial Mgmt: Reporting	GS50-03C-01 p. 107 OR GS50-03C-02 p. 107	Continuing Grants – Annual Financial Status Reports Bond, Grant and Levy Project Reports	Retain for 4 years after submission of report or for period required by grant/ program, whichever is later then Destroy. Retain for 4 years after submission of final report or for period required by grant/ program, whichever is later then Transfer to WSA for appraisal and selective retention.	



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Discontinued DAN Ver 7.2	Ver. 7.2 Function: Activity	Version 7.2 Title	Version 7.2 Retention	Schedule Function: Activity	Use:	Title	Retention	Rationale
SD51-04C-02 p. 26	HR Mgmt: Equity	Equal Employment Opportunity Inquiry (EEO)	3 years	CORE HR Mgmt: Recruitment/ Hiring	GS50-04B-01 p. 132 <i>OR</i>	Application for Employment When Applicant is Not Hired	3 years	May be obsolete record. These CORE series cover equal employment application surveys, reporting, violation complaints, and requests for information.
					GS50-04B-06 p. 130 <i>OR</i>	Personnel File	Retain for 6 years after termination of employment then Destroy.	
				CORE HR Mgmt: Reporting	GS50-04C-05 p. 134 <i>OR</i>	Reporting/Filing (Mandatory) – Human Resources	Retain for 4 years after submitted to regulatory agency then Destroy.	
				CORE Agency Mgmt: Legal Affairs	GS50-04C-04 p. 27 <i>OR</i>	Civil Rights Violation Complaints	Retain for 6 years after resolution, completion, closure, or decision not to proceed then Transfer to WSA for appraisal and selective retention.	
				CORE: Info. Mgmt: Public Disclosure	GS2010-014 p. 141	Public Disclosure/Records Requests	Retain for 2 years after public records request fulfilled then Destroy.	
SD51-01-22 p. 28	HR Mgmt: Staff Development	First Aid/CPR Training Documentation	Destroy when superseded plus 6 years	CORE Agency Mgmt: Training	GS2011-180 p. 48	Agency-Provided Training-Certificated, Hours/Credits Earned, or Mandatory	Retain for 6 years after training provided then Destroy.	Agency-provided training covered in CORE. (Except for In-service clock hours, SD 51-04G01). Reduction in duplication.
SD51-04G-05 p. 28	HR Mgmt: Staff Development	Staff Training, Assistance, and Review Program Case Files (Union Sponsored)	Retain for 5 years after exit from program then Destroy.	CORE: HR Mgmt: Misconduct/ Discipline/ Grievance	GS50-04B-46 p. 122 <i>OR</i>	Employee Misconduct Investigation Files – Sustained	Retain for 3 years after case closed then Destroy.	Agency intervention case files are covered by this CORE series. (Union-sponsored mentoring program records are not the records of the agency.)
					GS50-04B-47 p. 123	Employee Misconduct Investigation Files – Unfounded	Retain until case closed then Destroy.	



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Discontinued DAN Ver 7.2	Ver. 7.2 Function: Activity	Version 7.2 Title	Version 7.2 Retention	Schedule Function: Activity	Use:	Title	Retention	Rationale
SD51-06A-01 p. 29	Student Learning: Curriculum/ Instruction	Accreditation Reports and Evaluation Reports	Destroy when superseded plus 6 years – potential archival value	Agency Mgmt: Superintendent	SD51-05-11 p. 13	Accreditation	Retain for 6 years after end of calendar year then Transfer to WSA for permanent retention.	Consolidation of all records relating to accreditation, which is voluntary (vs. “approval”, which is mandatory/covered by SD51-05-10).
SD51-05F-01 p. 36	Student Learning: Student Records	Application for Certificate of Educational Competence	Retain until no longer needed for agency business then Destroy.	Student Administration: Student Records	SD51-05F-05 p. 43	General Educational Development (GED) Test – Eligibility	Retain until no longer needed for agency business then Destroy.	Consolidation of 3 records series. GED and Certificate of Educational Competence records are retained by SBCTC.
SD51-05F-04 p. 36		GED Permanent Transcript (GED Test Scores)						
SD51-06E-04 p. 40	Student Learning: Teaching Records	Statement of Requirements and Expectations, Signed and Returned by Parent/Guardian	Retain until end of school year then Destroy.	Student Learning: Curriculum	SD51-01-49 p. 29	Statement of Requirements and Expectations, Signed and Returned by Parent/Guardian	Retain until end of school year then Destroy.	Duplication of records series. Consolidation.
SD51-09A-06 p. 33	Home-Based Instruction	Placement/Evaluation on Test Results for Students Entering District from Home-Based Instruction	2 years after graduation or withdrawal	Home-Based Instruction	SD51-09A-03 p. 30	Transfer of Home-Based Student to School/District	Retain for 3 years after student graduates or withdraws from district then destroy.	Consolidation of related records/series.
SD51-03-10 p. 41	Student Mgmt and Services: Athletics	League Registration Forms	3 years	Student Mgmt and Services: Interscholastic Activities	SD51-03-04 p. 59	Interscholastic Eligibility	Retain for 3 years after end of school year then Destroy.	Consolidation.



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Discontinued DAN Ver 7.2	Ver. 7.2 Function: Activity	Version 7.2 Title	Version 7.2 Retention	Schedule Function: Activity	Use:	Title	Retention	Rationale
SD51-03-03 p. 41	Student Mgmt and Services: Athletics	Athlete/Team Achievement Records – Non-WIAA	PERMANENT	Student Mgmt and Services: Interscholastic Activities	SD51-20-02 p. 58	Interscholastic Activities - Achievements	Retain for 6 years after end of school year then transfer to WSA for appraisal and selective retention.	Consolidation of many records/series documenting interscholastic achievements.
SD51-03-11 p. 42		Schedules - Athletics	3 years					
SD51-03-12 p. 42		School Protests of Games	1 year					
SD51-03-13 p. 42		Scorebook/Score Sheets	1 year					
SD51-03-14 p. 42		Team Rosters	3 years					
SD51-20-05 p. 51	Student Mgmt and Services: Health Services	Health Room/Nurse Encounter Data (NED)	8 years after last interaction	Student Management and Services: Health Services	SD2012-071 p. 55	Health Care/Services Provided to Students	Retain for 8 years after last provision of health-related services then Destroy.	Clarify and consolidate all health care/services.
SD51-09-06 p. 51		Health Screening Results	Destroy after data is transferred to Student Health Card of Folder					
SD51-20-06 p. 52		Individual Health Plan (IHP)	8 years after last interaction					
SD51-09-07 p. 52		Medication/Health Procedures Administration Case Files	8 years after last dose/procedure administered					
SD51-09-09 p. 52		Student Health Card or Folder	2 years after graduation or withdrawal					



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SD51-09-04 p. 51	Student Mgmt and Services: Health Services	Communicable Disease Report	Destroy after summary report is submitted to local Health Department.	Student Mgmt & Services: Reporting – Student Health and Safety	SD2012-063 p. 12	Reporting – Student Health and Safety	Retain for 4 years after submission of report then Destroy.	Consolidation of reporting records; retention increased for accountability/ compliance.
SD51-05J-01 p. 53	Student Enrollment/ Assignment	Boundary Exception Appeals – Non-Resident Student	Retain for 10 years after final disposition of appeal then Destroy.	Student Assignment	SD51-05J-02 p. 38 OR	Student Assignment/ Transfer Requests – Granted	Retain for 6 years after end of school year then Destroy.	Denied requests for inter-district transfers must be appealed to OSPI in accordance with RCW 28A.225.230. (OSPI retains case files for 10 years.)
SD51-05J-07 p. 53		Boundary Exception Appeals – Resident Student	Retain for 3 years after final disposition of appeal then Destroy.		SD2012-067 p. 38	Student Assignment/ Transfer Requests – Not Granted	Retain for 3 years after denial of request then Destroy.	
SD51-05J-03 p. 53	Student Enrollment/ Assignment	Parent/Legal Guardian Assignment Request Forms	3 years	Student Assignment	SD51-05J-06 p. 37	Student Assignment	Retain for 4 years after end of fiscal year or until completion of SAO examination report, whichever is sooner, then Destroy.	Consolidation.
SD51-05-01 p. 56	Superintendent	Accreditation Certificates	PERMANENT	Agency Mgmt: Superintendent	SD51-05-11 p. 13	Accreditation	Retain for 6 years after end of calendar year then Transfer to WSA for permanent retention.	Consolidation.
SD51-05-04 p. 57	Superintendent	Certification of School District Elections	6 years Archival	CORE Boards, Councils and Committees	GS2012-018 p. 21	Certification of Elections – by Regulatory Agency	Retain until no longer needed for agency business then Destroy.	Elections certified by County Auditor, OSPI, or other regulatory agency.
SD51-05-03 p. 57	Superintendent	Certification of Election of School Board President	6 years Archival	CORE Boards, Councils and Committees	GS2012-019 p. 22	Elections (Official Results) – Held and Certified by the Local Government Agency	Retain for 6 years after end of calendar year then Transfer to WSA for appraisal and selective retention.	Internal elections.