

PUBLIC HOSPITAL DISTRICTS GENERAL RECORDS RETENTION SCHEDULE

Records Category: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS

The following general records retention schedule sets minimum retention requirements and provides local government agencies with blanket authority for the disposition of commonly held records according to the provisions of RCW 40.14.070 and WAC 434-635-050. This section begins with the signatures of the Local Records Committee, which signify the Committee's approval and the foundation of the records disposition authority that the schedule conveys to agencies of local government. Each records series entry is assigned a Disposition Authority Number. These numbers should be cited in the documentation that an agency maintains for the records it actually destroys. An agency may retain individual records series longer than the retention period approved by the Local Records Committee, but such records are subject to public disclosure and legal discovery until they are disposed of. Any records that may be discoverable in an active or pending court case must be retained and made available for discovery until the case is settled, regardless of their approved retention periods.

In some cases, the primary copy of a records series may be held by another agency/office. In those cases, use the retention period for secondary copies.

General records retention schedule listings for some records series include special designations and disposition instructions, including:

Official Public Records (OPR) are those records identified and required by statute that document legal actions or transactions and/or fiscally or financially obligates the law office. All other records are Office Files and Memoranda (OFM) as defined in RCW 40.14.010.

Potential Archival Value – This designation identifies records that have potential historical research value. These records must be appraised for transfer to the Regional Archives system before being destroyed. Contact your Regional Archivist to make arrangements for appraisal and transfer of records with potential archival value.

Essential Record – This designation identifies records that are essential for the continuity and restoration of agency operations after a disaster, serve as primary documentation of an agency's legal authority and responsibilities, or protects the rights of clients, property owners, students or other individuals.

ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS - INCLUSIVE Approved by the Washington State Local Records Committee – Revised July 2001



For the Attorney General: Brian Buccholz



For the State Auditor: George Geyer



The State Archivist: Phillip Coombs

Schedule Applicable to: ALL LOCAL GOVERNMENT AGENCIES

Schedule Title: ADMINISTRATIVE RECORDS COMMON TO ALL AGENCY WORK UNITS

DISPOSITION AUTHORITY GS 50-01

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	ADMINISTRATIVE PROCEDURES AND INSTRUCTIONS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-01	
2	ADMINISTRATIVE WORKING FILES Subject files containing informational copies of various records organized by issue, person, subject, or other areas of interest.	OFM	Destroy when obsolete or superseded - elected official, executive and department head files are potentially archival - See remarks	Destroy when obsolete or superseded	GS50-01-02	Please contact your Regional Archivist before disposing of elected official, executive, or department head files. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
3	ANNUAL REPORTS – OFFICE REFERENCE COPIES Copies of reports of activities submitted yearly to the governing council, commission, or board.	OFM	Clerk of governing council, commission, or board keeps primary copy PERMANENT - 1 copy archival - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-05A-04	Please contact your Regional Archivist. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
4	APPLICATION FOR EMPLOYMENT WHEN APPLICANT IS NOT HIRED – OFFICE REFERENCE COPIES Copies of employment applications submitted by applicants who were not hired.	OFM	Personnel office keeps primary copy 3 years	Office references copies - Destroy when obsolete or superseded	GS50-04B-01	
5	APPOINTMENT CALENDARS	OFM	Destroy when obsolete or superseded – See remarks	Destroy when obsolete or superseded	GS50-01-36	Elected officials and department heads may want to retain appointment calendars to document activities and appointments for a longer period of time.
6	BIOGRAPHICAL FILES ON AGENCY OFFICIALS AND STAFF – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-01	Please contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
7	BUDGET AND BUDGET DEVELOPMENT FILES – OFFICE REFERENCE COPIES The final budgets are retained permanently as reference attachments to the ordinances or resolutions that adopt them.	OFM	Final budget is kept by clerk of governing council, commission, or board PERMANENT Budget development and request files are retained 2 years by the finance or budget office	Office references copies - Destroy when obsolete or superseded	GS50-03D-03	
8	CENSUS RECORDS FROM THE STATE OFFICE OF FINANCIAL MANAGEMENT	OFM	The State Office of Financial Management keeps primary copy PERMANENT	Destroy when obsolete or superseded - Potential archival value - See remarks	GS50-01-37	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

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			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
9	CHRONOLOGICAL REFERENCE FILE Also known as reading or day file. Used as a chronological reference source supplemental to correspondence and subject reference files.	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-08	
10	CITIZENS' COMPLAINTS/REQUESTS	OFM	3 years	Destroy when obsolete or superseded	GS50-01-09	
11	CLAIMS FOR DAMAGES	OPR	Settlement plus 6 years	Destroy when obsolete or superseded	GS50-01-10	
12	CONTRACTS, AGREEMENTS, AND WARRANTIES	OPR	Termination plus 6 years	Destroy when obsolete or superseded	GS50-01-11	
13	CORRESPONDENCE Letters and attached materials sent and received during the course of agency business.	OFM	2 years - elected official, executive, and department head files are potentially archival - See remarks	Destroy when obsolete or superseded	GS50-01-12	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
14	FINANCIAL REPORTS – OFFICE REFERENCE COPIES Copies of financial reports made to and/or by the department regarding its, expenditures and the status of its budget.	OFM	3 years or until completion of State Auditor's examination report	Office references copies - Destroy when obsolete or superseded	GS50-3D-06	
15	FISCAL, PURCHASE AND RECEIVING DOCUMENTS	OFM	Finance or Purchasing Office keeps primary copies 6 years	Destroy when obsolete or superseded	GS50-01-17	
16	GOVERNING COUNCIL, COMMISSION, AND BOARD MEETING AGENDAS/PACKETS – OFFICE REFERENCE COPIES	OFM	Clerk of governing council, commission or board keeps primary copy 3 years	Office references copies - Destroy when obsolete or superseded	GS50-05A-03	
17	GOVERNING COUNCIL, COMMISSION, COMMITTEE, AND BOARD MINUTES – OFFICE REFERENCE COPIES	OFM	Clerk of governing council, commission or board keeps primary copy PERMANENT	Office references copies - Destroy when obsolete or superseded	GS50-05A-13	
18	HISTORICAL FILES OF THE AGENCY – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-02	Please contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
19	LEGAL OPINIONS – OFFICE REFERENCE COPIES	OFM	Agency attorney keeps primary copy PERMANENT - See remarks	Office references copies - Destroy when obsolete or superseded	GS53-02-03	If the agency contracts for outside legal representation, the primary record copy will probably be held by agency's executive administration.

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			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
20	LITIGATION FILES – OFFICE REFERENCE COPIES	OFM	Legal office or executive administration keeps until case closed plus 10 years - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS53-02-04	Primary copies of official court documents are held permanently by the Clerk of Superior Court, or 10 years by the District or Municipal Court Administrator. Please contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
21	MAILING LISTS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-21	
22	MASTER FILE OF AGENCY PUBLICATIONS – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-04	Please contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
23	NEWSPAPER CLIPPINGS – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-05	Please contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
24	OFFICIAL AGENCY POLICY AND PROCEDURE DIRECTIVES, REGULATIONS, AND RULES ESSENTIAL RECORD - Needs security microfilm backup - See remarks. (See item #1 for administrative procedures and instructions).	OPR	PERMANENT as adopted - One copy archival - See remarks	Destroy when obsolete or superseded	GS50-01-24	Please contact your Regional Archivist before destroying the original record. The information in this records series should be protected from loss or damage by offsite storage of a security microfilm backup at State Archives. Security microfilm must meet Washington State Archives technical standards.
25	ORDINANCE AND RESOLUTION DEVELOPMENT FILES Documentation of the analysis and development of ordinances and/or resolutions submitted for the approval of the agency's governing council, commission, or board.	OFM	3 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-25	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
26	ORDINANCES AND RESOLUTIONS – OFFICE REFERENCE COPIES	OFM	Clerk of the governing council, commission, committee, or board keeps primary copy PERMANENT	Office references copies - Destroy when obsolete or superseded	GS50-05A-16	

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			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
27	PAYROLL REPORTS – OFFICE REFERENCE COPIES	OFM	Payroll office keeps primary copy- 3 years, OR 60 years if needed for retirement audit	Office references copies - Destroy when obsolete or superseded	GS50-03E-25	
28	PERSONNEL FILES – OFFICE REFERENCE COPIES	OFM	Personnel office keeps primary copy until termination of employment plus 6 years	Office references copies - Destroy when obsolete or superseded	GS50-04B-06	
29	PHOTOGRAPHS AND OTHER AUDIO VISUAL MATERIAL – <i>OFFICE REFERENCE COPIES</i> Photographic negatives may be held in the Regional Archives for permanent preservation and security backup - See remarks.	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-06	Please contact your Regional Archivist before disposing of this record or to discuss transfer of negatives for permanent preservation and security backup.
30	PRESS RELEASES – OFFICE REFERENCE COPIES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-07	Please contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
31	PUBLIC OPINION POLLS	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-30	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
32	RECEIPTS FOR CASH RECEIVED – <i>OFFICE REFERENCE COPIES</i>	OFM	Finance office keeps primary copy 6 years	Office references copies - Keep 3 years	GS50-03A-21	
33	REQUESTS FOR LEAVE/OVERTIME	OFM	3 years	Destroy when obsolete or superseded	GS50-04B-09	
34	RESEARCH/PROGRAM REPORTS, STUDIES, SURVEYS, MODELS, AND ANALYSES	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-32	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
35	SCRAPBOOKS AND ALBUMS	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-06F-08	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.

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36	SPEECHES BY OFFICIALS AND STAFF REPRESENTING THE AGENCY – <i>OFFICE REFERENCE COPIES</i>	OFM	Destroy when obsolete or superseded - Potential archival value - See remarks	Office references copies - Destroy when obsolete or superseded	GS50-06F-09	Please contact your Regional Archivist before disposing of the primary copy of this record. Records from this series may be selected for transfer to and preservation at a Regional Archives branch.
37	SUPERVISOR'S EMPLOYEE PERFORMANCE BACKGROUND FILES	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-04B-30	
38	TELEPHONE LOGS AND USAGE DETAIL REPORTS	OFM	3 years	Destroy when obsolete or superseded	GS50-01-35	