 <b>ASB PROCEDURES MANUAL</b>	<b>RECORDS RETENTION</b>	<b>REVISED 10/18</b>
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## INTRODUCTION

Public records, office files and memoranda must be retained for specific reasons and times. Below is a brief overview of some records that may be affected by the Retention Laws and Guidelines. Please refer to WAC 414-08-020, 030, 040, 050 for more detailed information on retention and destruction of records.

## PROCEDURES

The following schedule is a condensed version of the State Approved Retention Schedule. The entire schedule is in the *Records Management Manual for School Districts* published by the State of Washington, Division of Archives and Records Management.

<b>Records Manual Series Title &amp; Description</b>	<b>Secondary Description</b>	<b>Retention Primary Copy</b>
Athletics	Eligibility Records	3 Years
Banking Records	Canceled Checks	6 Years
	Check Registers	6 Years
	Deposit Slips	6 Years
	Bank Statements	6 Years
Budget		Permanent
Budget Work Papers		Current and Prior Year
Cash Receipts Transmittals - Internal		3 Years
Club Constitutions		Permanent
Constitution and Bylaws		Permanent
Contracts/Agreements		Termination Plus 6 Years
Election Results		6 Years
Employee Reimbursement Forms		Current Year and Prior Year
Expenditure/Balancing Reports		Current Year and Prior Year
General Ledger		6 Years
Historical Materials	Trophies, Banners etc	Permanent
Imprest Reconciliation Forms		3 Years
Inventory Reconciliations	Student Store	3 Years
	Fundraisers	3 Years
	Ticket Sales	3 Years
Invoice/Approval/PO/Contract Copies		6 Years
Meeting Minutes of Clubs & Student Council		Permanent
Petty Cash Records		6 Years
Receipt Books (hand-written)		6 Years
Requisitions (original signatures)		Current Year and Prior Year
Student Fee/Fine Statements		6 Years
Transmittals with Z-tapes		3 Years

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The State Retention Manual addressing general local government records may be downloaded at:

<https://www.sos.wa.gov/archives/recordsretentionschedules.aspx>

The State Retention Manual addressing school district specific records may be downloaded at:

<https://www.sos.wa.gov/archives/recordsmanagement/records-retention-schedules-for-school-districts-and-educational-service-districts.aspx>

### **STORAGE**

The District is transitioning to an electronic archiving system. Contact EdTech to obtain the procedures for archiving records through the OpenText system.


### **DISPOSITION**

1. Supervised destruction of physical records is required. Record of destruction with the signature of witnesses should be retained.
2. Electronic destruction of records: approval and audit trail in maintained electronically through current means of OpenText.

### **ELECTRONIC MAIL**

**E-mail messages which are usually public records and must meet records retention requirements before being destroyed:**

- Policy and Procedure Directives
- Correspondence or memoranda related to official public business
- Agendas and minutes of meetings
- Documents relating to legal or audit issues
- Messages which document agency actions, decisions, operations and responsibilities
- Documents that initiate authorize or complete a business transaction
- Drafts of documents that are circulated for comment or approval
- Final reports or recommendations
- Appointment calendars
- E-mail distribution lists

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- Routine information requests
- Other messages sent or received that relate to the transaction of local government business

**E-mail messages which are usually administrative materials with no retention value:**

- Information-only copies, or extracts of documents distributed for reference or convenience, such as announcements or bulletins
- Phone message slips that do not contain information that may constitute a public record
- Copies of published materials
- Informational copies
- Preliminary drafts
- Routing slips
- Transmittals (letters/memos)

See E-mail Guidelines on-line at Archives website:

[www.sos.wa.gov/archives/RecordsManagement/Managing-Emails.aspx](http://www.sos.wa.gov/archives/RecordsManagement/Managing-Emails.aspx)

**Transferring Archival Records** – Records Management Manual

There are two methods for transferring records to the Washington State Archives; one for electronic records and one for paper records.

If the records are digital, you can work with the digital archives to transfer your records. They have made it very easy to transfer Archival Email, School Board Minutes and other born electronic records. They will provide preservation of these valuable legal and historical records as per Chapter 434-663 WAC. If you have archival electronic records to transfer to the Digital Archives, please contact them at 360-586-4901.

If the Archival records are paper, they need to be indexed and boxed up in Acid-Free Storage Boxes (see Long-Term Records). You may contact your Archives Branch for assistance.