

CORE/State General Schedule Updates

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WASHINGTON
Secretary of State

Washington State Archives

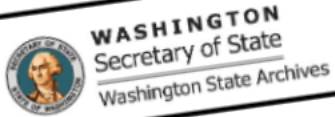
**The pace of data creation...
has, in most instances,
outpaced our ability to
ensure with confidence that
we can comply with rules,
regulations, controls, and
policies.**

Sue Trombley, Beyond the Box: The
Digital Impact on Retention Schedules
(June 2024)

Agenda

- 1) **What have we done?!**
- 2) New Records Series
- 3) Retention Updates
- 4) Minor Updates
- 5) Shifting Designations
- 6) Revocations
- 7) **What should *you* do?**

What Have We Done?!



This schedule applies to: All Local Government

Scope of records retention schedule

This records retention schedule authorizes the destruction/transfer of public records documenting common functions and activities of state government agencies, including Universities and Community and Technical Colleges. It is to be used in conjunction with the other approved schedules that relate to the unique functions of the agency.

Disposition of public records

Public records covered by records series within this schedule (regardless of format) must be retained for the minimum retention period as specified in this schedule. Washington State Archives strongly recommends the efficient and effective management of state resources.

Public records designated as "Archival (Permanent Retention)" must not be destroyed. Records designated as "Archival (Appraisal Required)" must be appraised by the Washington State Archives before disposition. Public records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such public records must be managed in accordance with the agency's policies and procedures for public records requests.

In addition to the minimum retention requirement of the applicable statute, grant agreement, and



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Disposition of public records

Public records covered by records series within this records retention schedule (regardless of format) must be retained for the minimum retention period as specified in this schedule. Washington State Archives strongly recommends the disposition of public records at the end of their minimum retention period for the efficient and effective management of state resources.

Public records designated as "Archival (Permanent Retention)" must not be destroyed. Records designated as "Archival (Appraisal Required)" must be appraised by the Washington State Archives before disposition. Public records must not be destroyed if they are subject to ongoing or reasonably anticipated litigation. Such public records must be managed in accordance with the agency's policies and procedures for legal holds. Public records must not be destroyed if they are subject to an existing public records request in accordance with chapter 42.56 RCW. Such public records must be managed in accordance with the agency's policies and procedures for public records requests.

Revocation of previously issued records retention schedules

All previous versions of the State Government General Records Retention Schedule are hereby revoked. The current version of the public records is in accordance with current, approved

Authority:

Retention Schedule (CORE)
August 2021

State Government General Records Retention Schedule
Version 6.2 (August 2021)

New Records Series

Digital Governance

***Applications/Systems –
Implementation Projects***
(CORE)

***Records
Reported/Submitted to
External
Databases/Systems*** (State
General Schedule/CORE)

Accountability

***Calendars – Elected
Officials and Agency Heads***
(CORE)

***Accommodation Requests
(ADA/Section 504)*** (State
General Schedule)

Risk Management

***Safety Data Sheets
(SDS)/Allowed Substitute
Records*** (CORE)

Notary Public Journals
(State General
Schedule/CORE)



Retention Updates

Legal/Regulatory

2-year requirement for testing collection process records (9 CFR § 382.401(b)(2))

Decreased from “14 days after date of deposit” to “Until deposit verified by bank”

Operational Realities

Decreased from “Life of the agency” to “50 years after end of calendar year”

“Contract/agreement” rather than “instrument”



Minor Updates

**Include/Exclude
Lists**

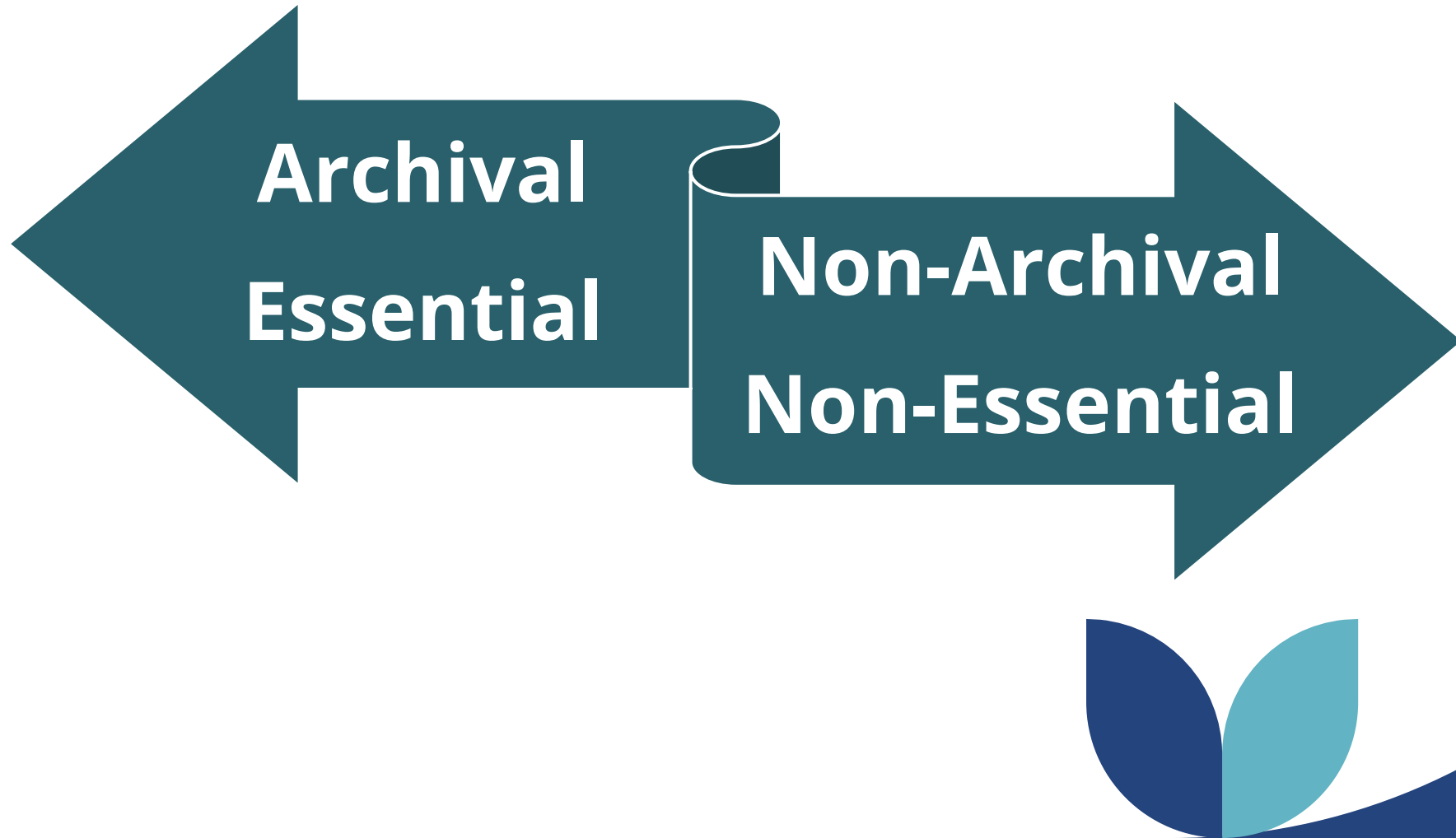
Descriptions

Titles

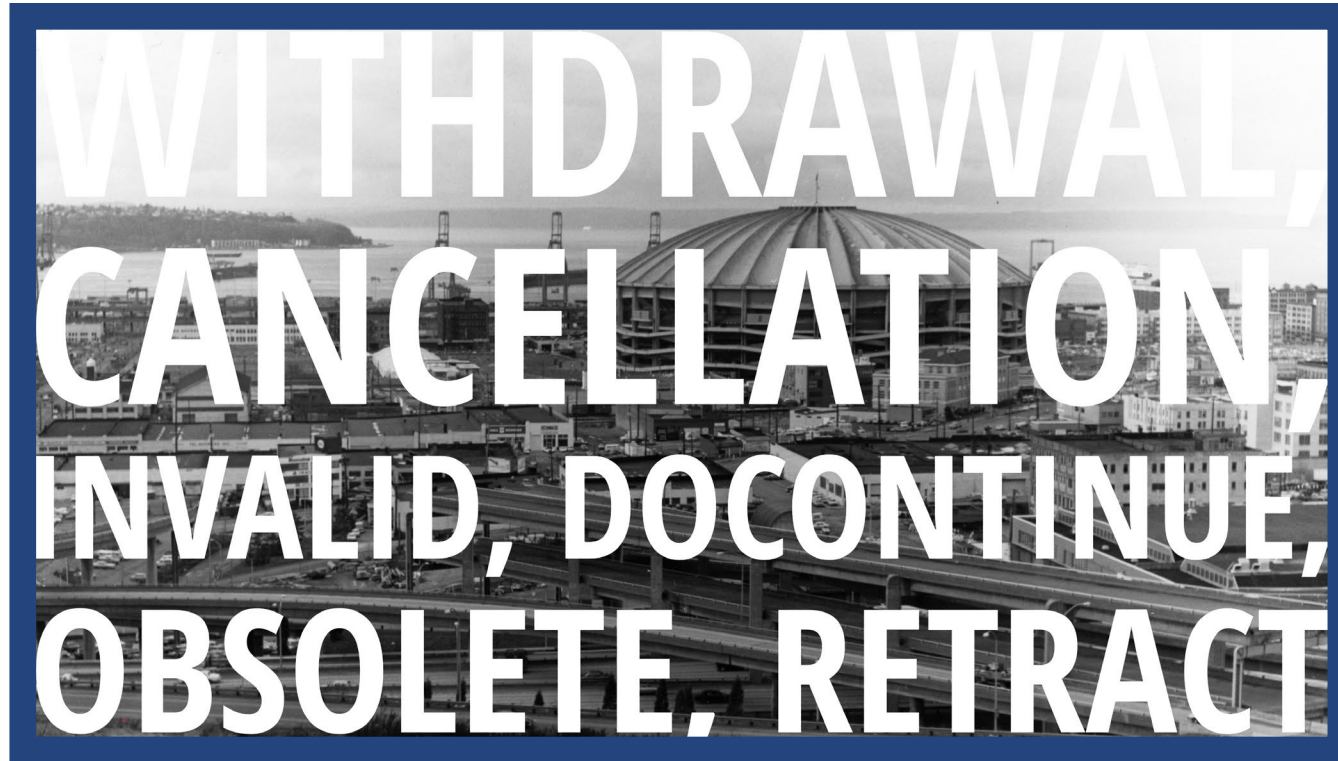
Categorization



Shifting Designations



Revocations



Kingdome, 1982, Washington Department of Transportation,
General Subjects Photograph Collection, Washington State Archives



What Should You Do?

- 1. Review the Summary of Changes**
- 2. Map Old DANs to New Ones**
- 3. Update Your Digital Systems**
- 4. Destroy Eligible Records**
- 5. Get Help if Needed**



Thank You ☺

**FREE consultation, training & advice
available at:**

**www.sos.wa.gov/archives
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(360) 586-4901**

