

Summary of Changes

WSU University Records Retention Schedule

February 2025

See also [Legacy Record changes](#)

Accidents/Incidents—No Claim Filed (Age 18 and Older)

DAN GS 18008 (Safety Records)

- Adds this new state records series (see Accidents—Vehicles / Vessels below).

Accidents/Incidents—No Claim Filed (Under Age 18)

DAN GS 18007 (Safety Records)

- Adds this new state records series (see Accidents—Vehicles / Vessels below).

Accidents—Vehicles / Vessels

DAN GS 16010

Revoked because it is covered by:

- Accidents/Incidents—No Claim Filed (Age 18 and Older) (GS 16010)
- Accidents/Incidents—No Claim Filed (Under Age 18)
- Injury Claims (GS 03015) See HRS dept. schedule.
- Maintenance—Major and/or Regulated (GS 21008) See Property Mgmt. Records schedule.
- Maintenance—Minor Nonregulated (GS 21002) See Property Mgmt. Records schedule.
- Security Incidents and Data/Privacy Breaches (GS 25008) See Security Records schedule.
- Reporting to External Agencies (Mandatory) (GS 19004) See Admin.—Gen. Office Operations schedule.

Accommodation Requests (ADA/Section 504)

DAN GS 18010 (Public Affairs and Public Disclosure Records)

- Adds this new state records series to WSU schedule.

Advertising and Promotion

DAN GS 05006 Rev. 2 (Public Affairs and Public Disclosure Records)

- Updates first sentence in description from “Records relating to the planning . . .” to “Records documenting the planning . . .”
- Changes retention from “transfer to Archives for appraisal and selective retention” to “destroy.”
- Removes archival designation.

Advisory Body Records

DAN GS 10015 Rev. 1 (Administrative—General Office Operations Records)

- Updates the sixth bullet in the list of included records.

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Audit Trails and System Usage Monitoring

DAN GS 14020 Rev. 2 (Information Services Records)

- Adds Security Incidents and Data/Privacy Breaches (GS 25008) to excluded records series.
- Changes retention from “1 year after date of activity” to “Until no longer needed for administrative purposes”

Authorization—Building/Facility Access

DAN GS 25001 Rev. 2 (Security Records)

- Adds students and visitors as persons with authorization to access buildings/facilities.
- Adds Authorization—Systems/Telecommunications Access (GS 14012) to excluded records series.

Authorization—Systems/Telecommunications Access

DAN GS 14012 Rev. 2 (Information Services Records)

- Adds Authorization—Building/Facility Access (GS 25001) to excluded records series.

Authorizations/Certifications Received by University

DAN GS 21013 Rev. 1 (Property Management Records)

- Updates title from “Authorizations/Certifications—Assets”
- Updates description and adds list of excluded records series.

Automated/Scheduled Tasks and Work/ Intermediate/Test Files

DAN GS 14015 Rev. 2 (Information Services Records)

- Changes retention from “30 days after date of document” to “until no longer needed for University business.” (This change was omitted in previous revisions in error.)
- Removes “event logs” from list of included records.
- Adds Audit Trails and System Usage Monitoring (GS 14020) to excluded records series.

(Reason: Clarifies the relationship between this records series and GS 14020).

Backups for Disaster Preparedness/Recovery

DAN GS 14011 Rev. 2 (Information Services Records)

- Removes “cyclical” backups from description.

Banking—Deposited Items

DAN GS 01068 Rev. 1 (Accounting Fiscal Records)

- Changes retention from “14 days after deposit” to “until deposit verified by bank”

Bids and Proposals—Unsuccessful

DAN GS 06007 Rev. 2 (Purchasing Records)

- Changes retention from “3 years after bid award or cancellation date” to 3 years after bid award or decision not to proceed”
- Adds “includes records relating to contract/agreement negotiations which do not result in an executed contract/agreement.”

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Calendars—Elected Officials and University Heads

DAN GS 10008 Rev. 2 (Administrative Executive Level Records)

- Clarifies this records series only applies to all elected officials and the single head of the University.
- Changes retention from “permanent retention” to “appraisal and selective retention.”
- Changes archival designation from “permanent retention” to “appraisal required.”

Capital Construction Projects—Routine Buildings/Facilities

DAN GS 21010 Rev. 2 (Property Management Records)

- Clarifies that preliminary planning records relate to capital construction projects of routine structures that are not proceeded with/completed rather than routine projects.

Capital Construction Projects—Significant Buildings/Facilities

DAN GS 21011 Rev. 2 (Property Management Records)

- Clarifies that preliminary planning records relate to capital construction projects of significant structures that are not proceeded with/completed rather than significant projects.

Celebrations/Ceremonies/Events—Routine

DAN GS 05008 (Public Affairs and Public Disclosure Records)

- Adds Personnel—Employment History Files (11-12-63578) to excluded records series.

Civil Rights Compliance—General

DAN GS 18011 (Public Affairs and Public Disclosure Records)

- Adds this new state records series to the WSU schedule.

Client/Customer Feedback and Complaints

DAN GS 09016 Rev. 2 (Administrative—General Office Operations Records)

- Adds “mediation” to sentence in third bullet of included records.

Commute Trip Reduction (CTR) Program

DAN GS 03037 Rev. 2 (Payroll and Personnel Records)

- Replaces Reporting/Filing (Mandatory)—Employment Related (GS 03056) with Reporting to External Agencies (Mandatory) (GS 19004) and removes note about GS 03056 in excluded records series.

Complaints and Grievances—Exonerated

DAN GS 03006 Rev. 1 (Payroll and Personnel Records)

- Adds Title IX records as required by 34 CFR § 106.45(b)(10), or as covered by Student Disciplinary Records (92-10-51356) to excluded records series.

Complaints and Grievances—Upheld

DAN GS 03003 Rev. 2 (Payroll and Personnel Records)

- Adds Title IX records as required by 34 CFR § 106.45(b)(10), or as covered by Student Disciplinary Records (92-10-51356) to excluded records series.

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Contact Information

DAN GS 50007 Rev. 1 (Administrative—General Office Operations Records)

- Updates first sentence in description to include employees.
- Updates the fifth bullet in the included records list.
- Adds “contact information gathered for other, more specific purposes...” to list of excluded records.

Contaminated/Compromised Records

DAN GS 11018 (Records Management Records)

- Adds this new state records series to the WSU schedule.

Contracts and Agreements—General

DAN GS 01050 Rev. 3 (Accounting Fiscal Records)

- Changes title from “Contracts and Agreements”
- Changes retention from “6 years after termination or expiration of instrument” to “6 years after termination or expiration of contract/agreement”
- Updates description for clarification.

Conversion/Conservation—Archival Records

DAN GS 11011

- Revoked because it is now covered by Conversion/Conservation of Records (GS 11013).

Conversion/Conservation of Records

DAN GS 11013 Rev. 2 (Records Management Records)

- Changes title from” Conversion/Conservation—Nonarchival Records.
- Removes reference to “nonarchival” public records.
- Adds Contaminated/Compromised Records (GS 11018) and Source Records—Imaged/Migrated (Archival) (GS 11014) to excluded records series.
- Changes retention from “retain until the converted/repaired nonarchival records have been destroyed . . .” to “retain until the converted/repaired records have been destroyed . . .”

COVID-19 Vaccination Status Verification Records

DAN GS 03058 Rev. 1 (Safety Records)

- Removes reference to obsolete Department of Labor and Industries Division of Occupational Safety and Health directives.
- Adds Policies and Procedures—Administrative Functions (GS 09028) to excluded records series.

Destruction of Public Records

DAN GS 11005

- Revoked because it is now covered by Destruction/Transfer of Records (GS 11001).

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Destruction/Transfer of Records

DAN GS 11001 Rev. 3 (Records Management Records)

- Changes title from “Transfer of Legal Custody”
- Decreases retention from “Life of the University” to “50 years after end of calendar year”
- Updates description for clarification.
- Removes Essential designation.

Emergency/Disaster Preparedness and Recovery Plans

DAN GS 14010 Rev. 3 (Security Records)

- Adds continuity of operations (COOP) plans and coordination of essential records protection to list of included records.

Employment Eligibility—U.S. Citizenship and Immigration Service (USCIS)

DAN GS 03036 Rev. 2 (Payroll and Personnel Records)

- Changes retention from “... 1 year after termination of employment ...” to “... 1 year after separation from University ...” (This change was omitted from previous revisions in error.)
- Removes F-1 and J-1 applications from list of included records.

Entry/Exit Logs—Facilities

DAN GS 25007 Rev. 1 (Security Records)

- Updates description to clarify that entry and exit documentation may be kept for anyone with addition of “etc.” and buildings are added along with facilities.

Establishment/Development History of University/Programs

DAN GS 10013 Rev. 2 (Administrative—General Office Operations Records)

- Adds biographical files/information and images/photos of notable individuals, officials, and University heads as included records.

External Audits/Reviews of University—Final Reports

DAN GS 04006 Rev. 2 (Accounting Fiscal Records)

- Adds records of the State Auditor’s Office to excluded records series.

Financial Transactions – General

DAN GS 01001 Rev. 1 (Accounting Fiscal Records)

- Changes retention from “6 years after date of document” to “6 years after end of fiscal year” (Change was not made in previous revisions in error.)

Forms—Development

DAN GS 12001 Rev. 2 (Records Management Records)

- Updates list of included records.

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Forms—Inventory Files

DAN GS 12003

- Revoked because it is now covered by Inventories—Supplies, Commodities, and Parts (GS 16004). See Property Mgmt. Records schedule.

Governing/Executive/Policy-Setting Body Records

DAN GS 10004 Rev. 2 (Administrative Executive Level Records)

- Changes retention from “6 years after date of document” to “within 6 years after end of calendar year” (*Reason: Allows records to be transferred sooner than 6 years after calendar year.*)
- Updates list of included records.

Grants Received by the University

DAN GS 23004 Rev. 2 (Research and Sponsored Projects Records)

- Removes “status reports” from third bullet of included records because it is also listed in fifth bullet.

Inventories—Supplies, Commodities, and Parts

DAN GS 16008 Rev. 2 (Property Management Records)

- Adds “forms” as included materials.

Litigation Case Files—Routine

DAN GS 18004 Rev. 2 (Legal Records)

- Adds “pleadings, appeals, court orders” to list of included records.
- Updates note about other included records not covered by a more specific records series.

Maintenance—Minor Nonregulated

DAN GS 21002 Rev. 2 (Property Management Records)

- Decreases retention from “6 years after completion of work” to “3 years after completion of work”
- Removes Facilities Systems and Equipment—Installation (GS 21015) from excluded records series.

Meeting and Board/Committee Administrative Arrangements

DAN GS 09024 Rev. 1 (Administrative—General Office Operations Records)

- Changes title from Meeting Arrangements.
- Updates description to reflect change of title.

Meeting Materials—Members’ Copies/Notes

DAN GS 09026 Rev. 1 (Administrative—General Office Operations Records)

- Adds “staff meetings” to included meeting list.
- Adds “individual members’ audio/visual recordings” to included records.

Nonservice Pay Authorization (WSU 1314)

DAN 11-12-63566 Rev. 1 (Payroll and Personnel Records)

- Adds ASWSU and Student Media pay authorization forms as records included in this series.

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Notary Public Journals

DAN GS 18012 (Legal Records)

- This new state records series is added to the WSU schedule.

Payroll Processing, Distribution, and Reporting

DAN GS 03033 Rev. 2 (Payroll and Personnel Records)

- Replaces Reporting/Filing (Mandatory)—Employment Related (GS 03056) with Reporting to External Agencies (Mandatory) (GS 19004) in excluded records series.

Personnel—Health-Related Records (Routine)

DAN GS 03054 (Payroll and Personnel Records)

- Changes title from “Personnel—Health-Related Records.”
- Adds Employee Medical and Exposure Records (GS 03039) as an excluded records series. (*Note: GS 03039 is not currently used on the WSU schedule*)
- Adds “positive results/refusals from alcohol/substance test of commercial driver’s license holder in accordance with 49 CRF § 382” to included records list.

Policies and Procedures (Employee Acknowledgements)

DAN GS 09031 (Payroll and Personnel Records)

- Adds this new state records series to the WSU schedule.

Policies and Procedures—University Core Mission

DAN GS 10002 Rev. 2 (Administrative Executive Level Records)

- Adds “less formal policy decisions which set or impact the direction and priorities of the University ...” to the description.

Position History

DAN GS 03010 Rev. 1 (Payroll and Personnel Records)

- Removes reference to the Position Action/Position Review Requests form (WSU 1162) and the Position Identifying Description Changes form (WSU 1265). Both of these forms are no longer on the schedule.

Public Disclosure/Records Requests

DAN GS 05001 Rev. 3 (Public Affairs and Public Disclosure Records)

- Adds the WSU Police Department as an official record holder.
- Updates list of included records and adds reference to Court Rule GR 31.1. (*Reason: clarifies this records series also covers tracking logs and requests made in accordance with Court Rule GR 31.1*).

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Records Control

DAN GS 11009 Rev. 3 (Records Management Records)

- Removes “essential records list” from included records.
- Adds “related correspondence/communications to included records.
- Removes Destruction of Public Records (GS 11005) from excluded records series.
- Adds Emergency/Disaster Preparedness and Recover Plans (GS 14010) from excluded records series.
- Adds Essential designation.

Records Reported/Submitted to External Databases/Systems

DAN GS 19006 (Administrative—General Office Operations Records)

- Adds this new state records series to the WSU schedule.

Recruitment

DAN GS 03012 Rev. 2 (Payroll and Personnel Records)

- Updates title from “Recruitment—Employee.”
- Updates applicants included from “applicants screened but not interviewed” to “applicants interviewed and/or screened but not hired.”

Reference Materials

DAN GS 50013 Rev. 1 (Administrative—General Office Operations Records)

- Updates list of included records.

Reporting/Filing (Mandatory)—Employment Related

DAN GS 03056

- Revoked because records are covered by Reporting to External Agencies (Mandatory) (GS 19004). See Admin.—General Office Operations schedule.

Reporting to External Agencies (Mandatory)

DAN GS 19004 Rev. 2 (Administrative—General Office Operations Records)

- Replaces Reporting/Filing (Mandatory)—Employment-Related (GS 03056) with Records Reported/Submitted to External Databases/Systems (GS 19006) in excluded records series.

Safety Data Sheets (SDS)/Allowed Substitute Records

DAN GS 09017 Rev. 3 (Safety Records)

- Removes reference to records of hazardous chemical use and analyses using exposure or medical records and the WAC references for these records.
- Adds notes to description.

Security Incidents and Data/Privacy Breaches

DAN GS 25008 Rev. 1 (Security Records)

- Updates description to include assessments to threats received and targeted violence towards staff, student, and others.

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Security Monitoring—No Incident

DAN GS 25003 Rev. 2 (Security Records)

- Updates listed included records and excluded records series. (Reason: Clarifies this records series also includes non-law enforcement dash cam recordings.)

Source Records—Imaged/Migrated (Archival)

DAN GS 11014 Rev. 2 (Records Management Records)

- Removed “non-archival” from title of Requirements for the Destruction of Paper Records After Imaging.
- Added note in Remarks column.

Source Records—Imaged/Migrated (Nonarchival)

DAN GS 11012 Rev. 3 (Records Management Records)

- Removed “non-archival” from title of Requirements for the Destruction of Paper Records After Imaging.
- Added note in Remarks column.

Stakeholder Group Relations

DAN GS 05010 Rev. 1 (Public Affairs and Public Disclosure Records)

- Adds “labor unions” to included stakeholder groups.

Stakeholder Liaisons (Significant) – Elected Officials and Agency Heads

DAN GS 10017 (Administrative Executive Level Records)

- Adds this new state records series to the WSU schedule.

State Publications

DAN GS 15008 Rev. 3 (Public Affairs and Public Disclosure Records)

- Updates remarks from “Upon publication, transfer two copies of printed format publications and/or one copy of electronic publications to WA State Library” to “Upon publication transfer two copies of tangible format publications and one copy of electronic format to WA State Library” (**Note:** the retention period for WSU is not changed.)

Tax Reporting/Returns—Internal Revenue Service (IRS)

DAN GS 01019

- Revoked because records are covered by Tax Reporting/Returns—Federal, State, and Local Taxes (GS 01071). See Accounting/Fiscal Records schedule.

Note: This records series is also removed from Payroll Services department schedule.

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Tax Reporting/Returns—Federal, State, and Local Taxes

DAN GS 01071 Rev. 1 (Accounting Fiscal Records)

- Changes title from “Tax Reporting/Returns–State and Local Taxes”
- Adds “federal” to included taxes.
- Adds Internal Revenue Service (IRS) Forms—Payroll (GS 03052), Payroll Processing, Distribution, and Reporting (GS 03033), and Vendor Payment Information (GS 01066) to excluded records series.

Theses and Dissertations

DAN 83-11-33255 Rev. 1 (Student Records)

- Moves to Student Records from the Anthropology Department schedule because more than one WSU department holds this record series.

Training Files—Employee

DAN GS 22003 Rev. 2 (Payroll and Personnel Records)

- Replaces “policy review acknowledgements” with “certificates/credentials/licenses awarded or renewed” in included records list.
- Adds Personnel Records (Peace/Corrections Officers) (LE2022-010) as an excluded records series. See WSU Police Dept. schedule.

Training—General

DAN GS 22007 Rev. 1 (Public Affairs and Public Disclosure Records)

- Changes “Copies of materials” to “Materials” under included records.

Training—Mandatory or Certification/Hours/Credit Provided

DAN GS 22008 Rev. 1 (Public Affairs and Public Disclosure Records)

- Changes “Copies of materials” to “Materials” under included records.

Travel

DAN GS 07001 Rev. 2 (Travel Records)

- Changes official record holder of TEV (WSU 1005) legacy records from Amgraf (E-Forms administrator) to Finance & Administration Information Services (FAIS).

Work Instructions/Desk Manuals

DAN GS 09001 Rev. 2 (Administrative—General Office Operations Records)

- Changes retention from “until superseded” to “until no longer needed for University business” (*Reason: Improve clarity to help with applying the retention.*)

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Legacy Records

The following legacy records are *removed* from the records retention schedule because the stated retention period has been met:

Expenditure Authority Delegation (WSU 1198)

Secondary Copy of DAN 11-12-63413 (Purchasing Records)

Expenditure Transfer Request (WSU 1048)

Secondary Copy of DAN 11-12-63483 (Accounting/Fiscal Records)

Payroll Expenditure Audit Report

Secondary Copy of DAN 11-12-63570 (Payroll and Personnel Records)

Position Action/Position Review Request form (WSU 1162)

Held under DAN 03010: Position History (Payroll and Personnel Records)