



King County

Department of Executive Services
Records and Licensing Services Division
**Archives, Records Management and Mail
Services Section**

PUBLIC RECORDS RETENTION SCHEDULE & DESTRUCTION AUTHORIZATION

RECORDS MANAGEMENT PROGRAM

Phone: (206) 477-6889
Email: records.management@kingcounty.gov
Mailstop: GBB-ES-0210

1. AGENCY DEPARTMENT/DIVISION/SECTION

Department of Executives Services / Human Resources Division
/ Compensation and Classification Services

**2. Department/Division/Section
(DDS) Number**

DES-HRD-(COMP) / 010101

**3. TOTAL NUMBER
OF PAGES:**

18

**4. DATE LAST
MODIFIED:**

February 6, 2018

5. STATUS

Final

6. SCOPE AND DISCLAIMER

This retention schedule can only be used by the agency listed in section 1. It supersedes any other versions of retention schedules used by the agency and is effective as of the date listed in section 11 on the last page. This schedule is a comprehensive listing of all public records held by the agency and authorizes the destruction or archival transfer of those records as indicated. For guidance about records not listed, please contact the Records Management Program.

Public records covered by record series on this records re

entention schedule must be retained for the required retention periods as described on this schedule. Public records designated as Permanent or Archival must not be destroyed. Public records designated as Potentially Archival must be appraised by the King County Archivist before disposition. This records retention schedule is subject to revision due to changes to local, state or federal regulations.

Approved documentation is required before any records listed on this records retention schedule can be dispositioned (destroyed or transferred to the King County Archives). Records filed to and managed within the KC ERMS will be dispositioned from within the KC ERMS and documentation will be maintained by the Records Management Program. Disposition of records managed outside of the KC ERMS must be documented on forms provided by the Records Management section on our website. Transitory records may be destroyed within the normal course of agency business without the use of any destruction forms.

7. LIST OF RECORDS SERIES						
7a. ITEM NO.	7b. TITLE/DESCRIPTION	7c. RETENTION	7d. DISPOSITION AND REMARKS	7e. OFFICE OF PRIMARY COPY	7f. CATEGORY	7g. RULE (DISPOSITION AUTHORITY NUMBER(S))
COMPENSATION & CLASSIFICATION						
1.	<p><u>Classification Specification History Files</u> A comprehensive set of all King County position classifications and corresponding descriptions, produced as positions are updated or created.</p> <p>Records include:</p> <ul style="list-style-type: none"> • Classification Specification • Executive Summary • Market Analysis • Pay Range Table: Annual snapshot of pay-range tables identifying King County positions, steps, and compensation levels. Updated and provided annually to FBOD/Payroll. Records include annual pay range table as well as any records used to interpret, modify, or adjust pay range tables such as addendums and other supporting documents. 	<p>Cutoff: None</p> <p>Retention: PERMANENT</p>	<p>Disposition Action: Non-Archival</p>		<p>Classification Specification History Files</p> <p>PER-03-008</p>	GS50-04B-08

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2.	<p><u>Compensation & Classification Projects</u> Records created and/or compiled for various HRD-Compensation & Classification projects where not covered by other more specific categories.</p> <p>Projects may include, but are not restricted to:</p> <ul style="list-style-type: none"> • Compensation & Classification Advice Projects • Records compiled and/or created in order to provide assessment of, and advice to, external local governments or to other King County Agencies regarding classification specifications, compensation, job descriptions, etc. • Assessment of external or internal King County agencies current class specification, advice on the detail on the role of classification title, duties, and obligations, as well as recommendation for, or justification of, salary or compensation. • Records used by the agency in an advisory capacity and are not the final determination by the external agency or internal King County agency. <p>May include, but is not restricted to:</p> <ul style="list-style-type: none"> • Policy interpretation, guidance, and advice; • Contingent Worker Body of Work Review; • Market Pay and Salary Survey development projects; • Job duties review projects <p>Excludes final reports covered under Research/Program Reports, Studies, Surveys, Models, and Analyses ACO-02-002; RFP and contract which should be retained according to CON-01-004, Inter-Agency, Intra-Agency, Inter-Governmental, Inter-Local Agreements or any other final deliverables arising from project records.</p>	<p>Cutoff: project complete</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p>		<p>Project Files ACO-02-001</p>	<p>GS50-01-39R1</p>

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3.	<p><u>Pay Range Table Development Files</u> Records used to create the annual pay-range tables identifying King County positions, steps, and compensation levels.</p> <p>Includes:</p> <ul style="list-style-type: none"> • Pre-work records such as communications, previous pay-range tables, and other documents used to create final product. <p>Excludes final pay-range tables updated and provided annually to FBOD/Payroll.</p>	<p>Cutoff: pay range table complete</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p>		<p>Project Files</p> <p>ACO-02-001</p>	GS50-01-39R1

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4.	<p><u>Position Classifications</u> Records establishing or developing roles and specifications of King County positions. Classification process may include a new classification specification, change of classification wages, or modification of specifications. Position Classifications are particular to brand new Classifications, or modification of current Classifications, when not initiated by a particular employee or group of employees. New market data from external sources, various research, new county agencies, etc., may prompt the need to create new or modify current classifications.</p> <p>Records include, but are not restricted to:</p> <ul style="list-style-type: none"> • Final Classification Specifications; • New Classification Notifications: Executive Summaries and Market Data Analysis; • Classification Study Forms; • FLSA Study Forms; • Research; meeting notes; correspondence, or data collected and used to develop job classifications. <p><i>Note: Copies of the final Executive Summary, Market Analysis, and Classification Specifications may be retained in the Job Classification File, but copies must also be retained PERMANENTLY in a separate file according to state Disposition Authority number GS50-04B-08, category PER-03-008, Position Description History Files.</i></p>	<p>Cutoff: obsolete or superseded</p> <p>Retention: 6 years</p>	<p>Disposition Action: Non-Archival - Destroy</p>		<p>Position Classifications</p> <p>PER-03-001</p>	<p>GS50-04B-05R1</p>

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5.	<p><u>Position Reclassifications</u> Records related to job classification review requests. Reclassifications arise directly from (and only when) an individual or agency seeks to reclassify a current position or review a salary range. Records review or study current positions, duties, roles, and responsibilities; documentation reflects the entire reclassification process which arose from the request. Review may result in the development of reclassifications where applicable.</p> <p>Records include, but are not restricted to:</p> <ul style="list-style-type: none"> • Job Reclassification form; • Classification Determination form; • Reconsideration Determination form; • Additional documentation from employee: work samples; exhibits, etc.; • Correspondence; meeting notes; other reference files used to make determinations such as Position Descriptions Questionnaires (PDQ); surveys; reports; other supporting documentation; • Copies of OLR or Personnel Board records such as appeals, decisions, and MOUs; • Project Allocation Spreadsheets. <p><i>Note: Copies of the final Executive Summary, Market Analysis, and Classification Specifications may be retained in the Job Classification File, but copies must also be retained PERMANENTLY in a separate file according to state Disposition Authority number GS50-04B-08, category PER-03-008, Position Description History Files.</i></p>	<p>Cutoff: project complete</p> <p>Retention: 6 years</p>	<p>Disposition Action: Non-Archival - Destroy</p>		<p>Position Reclassifications</p> <p>PER-03-002</p>	GS50-04B-05R1

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6.	<p><u>Reclassification Tracking Spreadsheets</u> Spreadsheets used to track and monitor various job reclassifications and updates.</p> <p>See <u>Position Reclassification</u></p>					
7.	<p><u>Salary Survey Report</u> Salary survey reports received from vendor documenting classification-related ad hoc salary data.</p> <p>Includes:</p> <ul style="list-style-type: none"> • Final report publication resulting from researching, studying, surveying, or analyzing classification related data within the county • Reports received from external agencies • Reports created by HRD-Compensation/Classification. 	<p>Cutoff: obsolete or superseded</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p>		<p>Research/Program Reports, Studies, Surveys, Models, and Analyses</p> <p>ACO-02-002</p>	GS50-01-32R1

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REPORTING & CONTRACTING						
	<p>Initial Hire/Promotional Pay Approvals Records <i>relating to</i> requests for workforce changes that require formal approval and that result in the beginning of recruitment processes or result in changes to the employment status of existing employees.</p> <p>May include documentation of pay-related requests or approvals in order to recruit and retain a competitive workforce, such as:</p> <ul style="list-style-type: none"> • Initial Hire, Promotion Pay Requests; • Probationary Step Increase Request; • Requests for staffing and new positions within the department including position specifications, needs analysis and other authorizations. <p>Note: Final copies of the Initial Hire, Promotional Pay Requests and Probationary Step Increase Requests should be sent to the requesting agency for retention with the employee's Pay History file. A copy of the approvals is retained with HRD according to King County Code 3.15.120.</p>	<p>Cutoff: Year-end in which request approved or denied</p> <p>Retention: 3 years</p>	<p>Disposition Action: Non-Archival - Destroy</p>	<p>A copy of the approved request is sent to the requesting department, division, or section to be retained with the employees pay history file.</p>	<p>Employment Requisitions PER-10-001</p>	<p>GS50-04B-17R1</p>

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	<p><u>Inter-Agency, Intra-Agency, Inter-Governmental, Inter-Local Agreements</u> Instruments signed by HRD-Compensation/ Classification and one or more other parties which set out the terms and conditions to which the signing parties agree or submit. This category is specific to inter-local agreements between the county and other county or public agencies in the interest of cooperatively sharing resources for mutual benefit.</p> <p>Records may include:</p> <ul style="list-style-type: none"> • Agreement; • Original request for proposals if accepted; Addendums; • Compliance monitoring, or other post award records needed to interpret, modify, adjust, monitor, or further negotiate original contract, such as change orders. <p>Excludes consulting project files retained under External Compensation & Classification Advice Projects.</p> <p>Excludes King County job classification-specific agreements.</p>	<p>Cutoff: termination or expiration of instrument</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p> <p>ESSENTIAL</p>		<p>Inter-Agency, Intra-Agency, Inter-Governmental, Inter-Local Agreements</p> <p>CON-01-004</p>	GS50-01-11R4B

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10.	<p>Reporting – (Mandatory) Agency Management Reporting required by ordinance or other federal, state, or local law, related to general management of HRD-Compensation & Classification. Records include reports, confirmation of submission, correspondence, inquiries, etc.</p> <p>Includes, but is not restricted to:</p> <ul style="list-style-type: none"> • Annual and triennial reports supplied to King County Council regarding classifications and class review processes. • Other studies, reports, or analysis related to human resource statistics or analysis and required to be submitted to external or other county agencies. <p>Excludes</p> <ul style="list-style-type: none"> • Reports prepared specifically for classification or reclassification projects. • Ad hoc data or statistical informational reports created and provided for <u>informational purposes only</u> such as layoff reports retained under <u>ACO-01-001, General Office Communications</u> category • Report (project) development files used to gather information and data and develop final report or study, retained under <u>Project Files, ACO-02-001</u>. 	<p>Cutoff: report or document submitted</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p>		<p>Reporting/Filing (Mandatory) – Agency Management</p> <p>ACO-02-004</p>	GS2012-028R1

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	<p><u>Reporting – Research/Program Report, Analysis, or Study</u> Program research reports, statistics, studies, surveys, or analyses compiled related to HRD-Compensation & Classification topics, where not required by federal, state, or local law. Reports may be requested from HRD or other King County agencies or external agencies and are more substantial and in depth than generic reports run through HRD database.</p> <p>Records may include, but are not restricted to:</p> <ul style="list-style-type: none"> • Reports sent to the Exec’s Operations Cabinet; • Tier 5 Quad Chart reporting on classification system sent to the Exec’s Cabinet; • Reports created for the Office of Labor Relations; • Reports submitted to HRD managers or other county agencies; • Compliance reports related to passed and proposed legislation. May be provided to Council. <p>Excludes:</p> <ul style="list-style-type: none"> • Reports required by local, state, or federal law, ordinance, or code retained under <u>Reporting/Filing (Mandatory) – Human Resources Management, PER-12-002</u> or <u>Reporting/Filing (Mandatory) – Human Resources Management, PER-12-002.</u> • Reports prepared specifically for classification or reclassification projects. • Ad hoc data or statistical informational reports created and provided for <u>informational purposes only</u> and where information is not unique (i.e. not reproduced from database) such as layoff reports, which should be retained under <u>ACO-01-001, General Office Communications</u> category. • Report (project) development files used to gather information and data and develop final report or study, retained under <u>Project Files, ACO-02-001.</u> 	<p>Cutoff: obsolete or superseded</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p>		<p>Research/Program Reports, Studies, Surveys, Models, and Analyses</p> <p>ACO-02-002</p>	<p>GS50-01-32R1</p>

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COMPLIANCE						
	<p><u>Audit Findings/Reports</u> Final findings of audits conducted of HRD-Compensation & Classification by the King County Auditor (or via contracted company acting on behalf of the County Auditor's Office), or by an outside auditing agency (State, Federal, Independent, etc.).</p> <p>Includes any records used to interpret or modify findings as well as any response to findings.</p> <p>Note: This category may also encompass significant drafts published at periodic intervals by the Auditor's Office.</p>	<p>Cutoff: completion of report and corrective action taken</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p>		<p>Audit Findings AUD-01-003</p>	GS50-03F-02
12.	<p><u>Audit Working Files And Supporting Materials</u> Records collected or created and used to respond to internal or external audits of the HRD-Compensation & Classification section, OR cumulative data on HRD-Compensation & Classification and audit issues collected by King County Auditor.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Copies of original source records; • Database printouts; • Correspondence; • Corrective action work plans; • Status reports; • Additional supporting documentation. 	<p>Cutoff: completion of audit and all corrective action taken</p> <p>Retention: 6 years</p>	<p>Disposition Action: Non-Archival - Destroy</p>		<p>Audit Working Files and Supporting Material AUD-01-002</p>	GS50-03F-01

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POLICY, PROCEDURES, AND GENERAL ADMINISTRATION						
14.	<p><u>Budget Development</u> Background information and draft documentation compiled in the course of budget preparation.</p> <p>May include:</p> <ul style="list-style-type: none"> • Preliminary budgets, spreadsheets, statistics, expenditure reports, correspondence, briefing materials, and supporting documentation. 	<p>Cutoff: final budget adopted</p> <p>Retention: 4 years</p>	<p>Disposition Action: Non-Archival - Destroy</p>		<p>Budget Development Files</p> <p>BUD-01-001</p>	GS50-03D-03
	<p><u>Communications with the Public</u> General communications with the public related to requests for information/agency action or a regarding a complaint. Includes associated agency response.</p> <p>Includes, but is not restricted to:</p> <ul style="list-style-type: none"> • Requests routed through the central HRD email or phone messaging systems including response. <ul style="list-style-type: none"> • Examples include: Request for information on County employees' salaries, requests for information regarding benefits and compensation, etc. <p>Excludes official Public Records Act Requests retained under INF-01-002</p>	<p>Cutoff: year end in which issue was resolved</p> <p>Retention: 3 years</p>	<p>Disposition Action: Non-Archival - Destroy</p>		<p>Public Complaints and Requests for Agency Action</p> <p>PRE-01-001</p>	GS50-01-09R1

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	<p><u>General Advice and Communications</u> Records created, received and used when communicating within and outside the county related to general agency topics. Also includes staff meeting agendas and minutes</p> <p>Includes:</p> <ul style="list-style-type: none"> • <u>Communications related to Public Disclosure Requests</u> sent to the agency's Public Records Officer or responding agency, in response to a Public Records Act Request. Excludes any requests that result in a reclassification and where records provided were used in the development of the reclassification. • <u>Agency Advice and Correspondence:</u> Communications and advice provided to agencies regarding organizational structure; advice provided related to classification of new/existing positions. • <u>Classification/Compensation Issues:</u> Communication related to identifying and resolving <i>general</i> classification and compensation issues. • <u>Correspondence with Office of Labor Relations:</u> Correspondence with the Office of Labor relations addressing and analyzing <i>general</i> issues for employees covered by labor agreement. • <u>Other general advice/communications</u> both internal and external such as: RFP and Contract review correspondence; Budget review and correspondence; Other correspondence related to purchasing, etc. <p>Excludes any communications or advice related to <i>specific</i> Job Classification or Reclassification Request projects. These should be maintained with project file. Excludes any policy, recommendations, legal advice, or correspondence used to inform agency procedures or further interpret agency policy.</p>	<p>Cutoff: year end</p> <p>Retention: 2 years</p>	<p>Disposition Action: Non-Archival - Destroy</p>		<p>General Office Communications and Staff Meetings</p> <p>ACO-01-001</p>	<p>Combo Rule ACO-01-001</p> <p>GS50-01-02 (Administrative Working Files)</p> <p>GS50-01-43R2 (Staff Meetings)</p> <p>GS2010-001R3 (Communications)</p>

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	General Office Accounting - Secondary Copies of office accounting records, including documentation of purchasing and invoices.	Cutoff: no longer needed for agency business Retention: none	Disposition Action: Non-Archival - Destroy	DES / HRD Finance Administrator (primary copies are retained 6 years after year end)	N/A	GS2011-184R3(S)
16.	King County Council Transmittal Development Files Documentation of the analysis and development of transmittals, submitted for approval by the agency's governing council, commission, or board. May include transmittals for ordinances, motions and confirmation requests prepared for and sent to the King County Council. Includes, but is not limited to: <ul style="list-style-type: none"> • Annual Cola Ordinance development files; • Job Classification Confirmation Requests 	Cutoff: approval or decision not to proceed Retention: 3 years	Disposition Action: Potentially Archival – Appraisal Required		Ordinance, Motion, and Resolution Development and Transmittal Files LES-02-002	GS50-01-25R1
17.	Legal Advice and Policy/Procedure Guidance Advice and guidance provided to HRD-Compensation & Classification from agency attorney on <i>general</i> internal procedures, decision making, and protocols. Used to provide direction and guidance on HRD-Compensation & Classification operations. Include legal advice on procedures related to labor negotiations. Note: Advice, documents, and other communications related to specific classification or reclassifications projects should be retained with related Job Classification or Reclassification File. <i>KC PAO retains official Legal Case Files. KC OLR retains official Labor Negotiation Files.</i>	Cutoff: obsolete or revised Retention: 3 years	Disposition Action: Non-Archival - Destroy		Administrative Procedures and Instructions ACO-03-004	GS50-01-01

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	<p><u>Policy Development Files</u> Records relating to the research and development of agency (HRD) policies.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Correspondence, research, and drafts. 	<p>Cutoff: final policy approved</p> <p>Retention: 6 years</p>	<p>Disposition Action: Potentially Archival – Appraisal Required</p>		<p>Policy Development Files</p> <p>ACO-03-001</p>	GS50-01-39R1
18.	<p><u>Work Plans</u> Plans describing work to be performed, including timelines and areas of responsibility for specific actions. Also includes records relating to development of work plans such as Quad Charts.</p>	<p>Cutoff: revised or obsolete</p> <p>Retention: 2 years</p>	<p>Disposition Action: Non-Archival</p>		<p>Work Plans</p> <p>ACO-04-004</p>	GS50-01-38R2

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TRANSITORY & SECONDARY COPIES						
	<p>Transitory Records Public records that only document information of temporary, short-term value, and provided that the records are not needed as evidence of a business transaction; and, not covered by a more specific records series.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Agency-Generated Forms and Publications – Copies (Copies of unused forms) • Brainstorming and Collaborating (Notes, mind maps, white board collaboration notes, post-its, A3, flip charts) • Contact Information (external clients or stakeholders) • Drafting and Editing (Preliminary drafts with only editing suggestions, notes, and related correspondence if they do not document decision making or substantive changes) • Electronic documents when printed version is finalized with inked signature • General Information – External (FYI information received from external sources) • Unsolicited Materials/publications (Not requested nor used) • Basic/routine short-term communications that do not document decision making or agency actions and not covered by another category, such as – “I am running late this morning” or “Come see me at my desk when you can”) • Internet Browsing History (cookies/cache/temp files on your computer) • Organizing/Monitoring Work In Progress (to-do lists; working notes; status logs) • Records Documented as Part of More Formalized Records (Notes used for data entry; raw stats/survey responses consolidated into a larger report or record if not required for other uses) 	<p>Cutoff: Retain until no longer needed</p> <p>Retention: None</p>	<p>Disposition Action: Non-Archival - Destroy</p>		N/A	<p>Refer to General Records Retention Schedule for complete list of DANs in this series.</p> <p>Note: destruction documentation is not required for Transitory Records.</p>

<p>8. RECORDS AND INFORMATION MANAGER SIGNATURE <i>I hereby certify that the records series as described comply with current federal, state, and local regulations as of the date listed in section 4, and I ensure the accuracy of this schedule.</i></p> <p><i>See original for signature</i> <i>5-11-2015</i></p> <hr/> <p>Gail Snow Date</p>	<p>9. COUNTY ARCHIVIST SIGNATURE <i>I hereby certify that I have reviewed the records series as described. I will appraise any series designated as potentially archival and accession any records appraised or designated as archival.</i></p> <p><i>See original for signature</i> <i>5/13/2015</i></p> <hr/> <p>Carol Shenk Date</p>
<p>10. AGENCY MANAGER SIGNATURE <i>I certify that I have read and understood these records retention requirements and agree to implement the records retention schedule for all records and information within the scope of my responsibility.</i></p> <p><i>See original for signature (former manager James Fournier)</i> <i>05/07/2015</i></p> <hr/> <p>Meredith Merriman Date</p>	
<p>PUBLIC RECORDS COMMITTEE USE ONLY - DO NOT FILL IN BEYOND THIS POINT</p>	
<p>11. PRC APPROVAL</p> <p><i>See original for signature</i> <i>June 3, 2015</i></p> <hr/> <p>Deborah Kennedy Date King County Public Records Committee</p>	