

HOW TO ARCHIVE RECORDS:

Board [Policy 6560](#) / [Procedure 6560P](#)

- When completing a [Records Destruction Form](#) please make sure to note when the designation says ARCHIVAL. These documents need to follow the retention time period and then be transferred to the Washington State Archives for permanent retention. Below are examples of records that would need to be archived.

6.4. STUDENT RECORDS <i>Reference chapter 392-185 WAC and chapter 392-415 WAC.</i>			
DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
SD51-20-10 Rev. 1	Graduate List Annual list of graduates. Excludes records covered by <i>Official Student Record (DAN SD51-05F-10)</i> .	Retain for 6 years after current school year <i>then</i> Transfer to Washington State Archives for permanent retention.	ARCHIVAL (Permanent Retention) NON-ESSENTIAL OFM

SD51-05F-11 Rev. 1	School Registers <i>Remarks: If there is no official student record that supersedes the school registers, these must be retained for 100 years.</i>	Retain until no longer needed for agency business <i>then</i> Transfer to Washington State Archives for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OFM
-----------------------	---	--	---

7.3. INTERSCHOLASTIC ACTIVITIES			
DISPOSITION AUTHORITY NUMBER (DAN)	DESCRIPTION OF RECORDS	RETENTION AND DISPOSITION ACTION	DESIGNATION
SD51-20-02 Rev. 1	Interscholastic Activities – Achievements Records documenting individual, team, and group achievements in interscholastic activities and contests, where students from more than one school district compete with each other for possible advancement to regional, district, state, and/or national levels of competition. Interscholastic activities and contests include, but are not limited to, those overseen by: <ul style="list-style-type: none"> Office of the Superintendent of Public Instruction: Distributive Education Clubs of America (DECA), Future Farmers of America (FFA), Future Business Leaders of America (FBLA), etc.; Association of Washington School Principals: Student Council, National Honor Society, Senate Youth Program, etc.; Washington Interscholastic Activities Association (WIAA): Drama, forensics, music, spirit, athletics; Independent sponsors: Chess, History Day, Knowledge Bowl, Math Olympiad, Science Bowl, Spelling Bee, YMCA Youth & Government Mock Trial Program, etc. Records include, but are not limited to: <ul style="list-style-type: none"> Schedules (dates and locations of competitions, events, games, meets & matches); Rosters; Event/tournament programs, photos, posters, etc.; School protests of events/games; Awards/recognition and rankings. <i>Note: Other historical materials and artifacts (non-records) should also be retained by the school for commemorative events and displays (school reunions, centennials, etc.) or made available to local heritage organizations. Items may include banners, trophies, uniforms, etc.</i>	Retain for 6 years after end of school year <i>then</i> Transfer to Washington State Archives for appraisal and selective retention.	ARCHIVAL (Appraisal Required) NON-ESSENTIAL OPR

2. Once you have pulled the records designated as archival please follow the steps listed on the Secretary of State, [Washington How to Transfer Archival Records](#).
 - a. This will show you how to transfer both [paper](#) and [electronic records](#).
 - i. [Paper](#) Records:



Records Management Advice

Issued: February 2017

(Originally Issued: March 2012)

Transferring Archival Records: Preparing Paper Records for Archival Transfer

Purpose: Provide guidance to state and local government agencies on how to prepare paper based records for transfer to Washington State Archives.

Once an agency has determined that they have archival paper records, and the retention requirement for those records has been satisfied, there are certain steps the agency should undertake to ensure the records are ready for transfer to the Washington State Archives. Meaningful arrangement and identification of the records helps our archivists provide efficient and knowledgeable reference to both the creating agency and the research community.

1. Take time to review the records and consult with your Records Officer. Remove duplicates, non-archival records, and office supplies. Organize documents by record series.
2. Use an approved archival box, available through the Washington State Archives. No other boxes or containers will be accepted. Provided the boxes are used to store records that will eventually be transferred to the Washington State Archives, they can be obtained at no cost from:
 - a. State Records Center (for state government agencies); or
 - b. Your local branch of the State Archives (for local governments).
3. Boxes should include only one record series (which may result in more boxes). Contents should be clearly identified on box content labels affixed to the outside of the box and contain a box content list.
4. Content lists should be typed and contain adequate information for future access. Please do not use acronyms, office numbers, or obscure "agency speak."
5. Do not pack records tightly in a box: allow for some "wiggle" room for retrieval and re-filing. Folders should be organized facing the front of the box. If legal sized, folders should face the opening side of the box.
6. Label folders clearly and accurately, so that people unfamiliar with your agency can understand and navigate the records in the future ("Mary's files" or just "1995" is not adequate identification).

Any statutory exemptions or confidential information should be clearly marked and communicated to Archives staff prior to transfer. For example, place these records in a red folder or marked envelope in the box, and note the status of the record on the accompanying content list.

By taking the appropriate measures prior to transfer, agencies will greatly assist the efforts of the Archives to provide access to important public records for generations to come.

**Additional advice regarding the management of public records is available from
Washington State Archives:**

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov**

ii. [Electronic Records](#):



Records Management Advice
Issued: March 2017

Transferring Archival Records: Preparing Digital Records for Archival Transfer

Purpose: Provide guidance to state and local government agencies on how to plan and prepare electronic Archival records for transfer to Washington State Archives.

FIRST: Verify that digital records do have an Archival designation or any exceptions are approved by the Archives and eligible for transfer. Contact recordsmanagement@sos.wa.gov with any questions of eligibility.

NOTE: *Please do NOT send the Archives CD's or DVD's. If you have data or information stored on a CD or DVD, download the files to a location on a drive and then prepare for transfer.*

Start preparing files for transfer:

- Please perform some housekeeping on files and “sweep out the garage” and clean out any junk, duplicates and redundancies in the files prior to transfer.
- Emails: “Cookies in the Break Room!” or “Go favorite sports team!” and other emails social announcements are not Archival and should not be included in a transfer. Spare future researchers from reading grocery and “honey do” lists and limit the transfer of emails to those that reflect the business of government.
- Run emails through a virus scan as part of preparation for transfer.
- Just like paper files, electronic files need to be organized in a meaningful way so that future researchers can readily find information. Files should have consistent metadata to aid in searching. Avoid sending over multiple versions of the same thing.
- If you are transferring photographs have some identifiable metadata attached like date, event and identify people and places featured in photo. No office party photos or selfies!
- Images and audio files require a separate indexing spreadsheet for those images and audio files that are supported and accessed through the public website. Files currently supported:
 1. Minutes, Ordinances and Resolutions
 2. Audio recordings of public meetings

For indexing assistance and to prepare video files, contact:
recordsmanagement@sos.wa.gov

Once files have been prepared for transfer, complete a Digital Transfer Inventory Sheet and submit to:

digitaltransfers@sos.wa.gov

Once the Digital Transfer Inventory Sheet is submitted, an acknowledgement will be sent with further instructions to facilitate the actual transfer. By properly preparing digital records prior to transfer, agencies will greatly assist the efforts of the Archives to preserve and make accessible public records for generations to come.

**Additional advice regarding the management of public records is available from
Washington State Archives:**

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov**

1. Please remember that you [keep electronic records in electronic form](#). There is no need to turn them into paper records.

3. Local Archival Office:

Northwest Regional Branch

Washington State Archives
Western Washington University, MS-9123
Bellingham, WA 98225-9123

Email: NWBranchArchives@sos.wa.gov
Phone: (360) 650-3125
Fax: (360) 650-3323

4. Ordering [Archival Boxes](#):



Records Management Advice
Issued: December 2020

Organizing and Inventorying: How to Order Washington State Archives' Boxes

Purpose: Provide guidance to state and local government agencies on how to request and order records boxes from the Washington State Archives.



For state agencies:

State agencies work directly with the Washington State Records Center to get boxes delivered to their location. Agencies will fill out the [Supply Request Form](#) and email it to the Records Center staff:

recordscenter@sos.wa.gov.

For local government entities:

Local government entities work directly with their regional archivist to either pick up or have boxes delivered to their location. The Washington State Archives has five regional branches across the state to better serve the regions. When contacting your regional archives, please let the archivist know how many boxes you need and what types of records will be stored in them.

Please contact Records Management staff to help locate your regional archives location:

recordsmanagement@sos.wa.gov.

If you know which branch services your location, you can contact your regional archivist directly:

Central Region: CEBranchArchives@sos.wa.gov

Eastern Region: EABranchArchives@sos.wa.gov

Puget Sound Region: PSBranchArchives@sos.wa.gov

Northwest Region: NWBranchArchives@sos.wa.gov

Southwest Region: SWBranchArchives@sos.wa.gov



**Additional advice regarding the management of public records is available from
Washington State Archives:**

www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov

- a. Follow the steps for the local government entities

5. Questions? Help?

- a.** Please contact Brenna Hanson with any questions, clarification or assistance:

Brenna Hanson

bhanson@everettsd.org

x4153

- b.** Archiving records needs to be indicated and approved on our records destruction form prior to sending to the Archival Office.