



# WWU General Records Retention Schedule

Disposition authority granted by the State Records Committee under RCW 40.14 on 6/3/2020.

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Disposition authority granted by the State Records Committee under RCW 40.14 on 6/3/2020.

## Section 1: Governance and Administration

Overseeing university activities and administrating university policies.

### Internal Governance and Administration

Administering internal policies and activities.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 09023.001.18354</b>	<b>Calendars, Appointment Books, Routine Telephone Logs</b> Provides a record of employee appointments, schedules, and meetings.	<b>Retain for 1 year after calendar year</b> <i>then</i> <b>Destroy</b>
<b>GS 03006.001.18411</b>	<b>Complaints and Grievances – Exonerated</b> Records relating to complaints and grievances filed in cases of affirmative action, discrimination, equal opportunity employment, harassment issues, and academic issues in which the complaint/grievance proved to be unsubstantiated. May be filed by students, job applicants, the public, and represented and non-represented state employees.  May include: filed complaints and grievances; supporting documentation; unit or university responses and decisions; legal actions, arbitration or mediation efforts; determinations and appeals. Excludes records covered by Complaints and Grievances -- Upheld (GS 03003.001.18140).	<b>Retain until exoneration</b> <i>then</i> <b>Destroy</b>
<b>GS 03003.001.18410</b>	<b>Complaints and Grievances – Upheld</b> Records relating to complaints and grievances filed in cases of affirmative action, discrimination, equal opportunity employment, harassment issues, and academic issues in which the complaint/grievance was upheld. May be filed by students, job applicants, the public, and represented and non-represented state employees.  May include: filed complaints and grievances; supporting documentation; unit or university responses and decisions; legal actions, arbitration or mediation efforts; determinations and appeals. Excludes records covered by Complaints and Grievances --Exonerated (GS 03006.001.18411).	<b>Retain for 6 years after final determination of case</b> <i>then</i> <b>Destroy</b>
<b>GS 09029.001.18401</b> <b>ARCHIVAL RECORD</b>	<b>Executive Administration and Communication Records</b> Records documenting official activities and communications relevant to the office's executive function. May include: administrative correspondence, directives, and subject files. Does not include records dealing with personnel management or budget planning.	<b>Retain for 2 years after fiscal year</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>

## Section 1: Governance and Administration

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### Section 1: Governance and Administration

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#### Internal Governance and Administration

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WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 50006.001.19110</b>	<b>Meeting Records - Check-in/Stand-up Meetings</b> Records of check-in or "stand-up" meetings focused on information sharing, brainstorming, and planning, where no formal decisions are made. (Generally, these types of meeting do not generate records.)	<b>Retain until no longer needed</b> <i>then</i> <b>Destroy</b>
<b>GS 10004.001.18332</b>  <b>ARCHIVAL RECORD</b>	<b>Meeting Records - Governing or Policy-Setting Committees, Councils, Task Forces, and Other Bodies</b> Records of policy-setting committees, councils, task forces, and other deliberative or governance bodies (other than the Board of Trustees, Faculty Senate, and Associated Students Board of Directors). May apply to bodies at the university, division, college, or departmental level. Typical records include charge/statement of authority, meeting agendas and minutes, and reports or other mandated output.  Does not include records of adjudicative bodies, curriculum committees, or records of search committees, for which separate schedules apply, and does not apply to informal, non-reporting groups.	<b>Retain for 6 years after calendar year</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>
<b>GS 09009.001.19111</b>	<b>Meeting Records - Staff Meetings and Internal Working Groups</b> Records of staff meetings and other internal working groups that do not require reporting out to other bodies (and when not otherwise identified on a retention schedule). May include agendas, meeting minutes, and meeting handouts.  Does not include records of adjudicative bodies, curriculum committees, or records of search committees, for which separate schedules apply, and does not apply to formal, policy-setting bodies.	<b>Retain for 2 years after calendar year and no longer needed</b> <i>then</i> <b>Destroy</b>
<b>GS 10013.001.18407</b>  <b>ARCHIVAL RECORD</b>	<b>Office/Program History Files</b> Records documenting the planning, establishment and significant changes/developments of a unit. May include: summaries or histories of the office; scrapbooks, news clippings, photographs, etc., documenting the history of the office; organizational charts and other planning records documenting significant changes and restructures (such as office mergers/splits, creation/combinations of divisions, major changes of office functions and roles, etc.); or transitional documentation prepared for incoming unit heads.	<b>Retain for 6 years after calendar year</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>

### Section 1: Governance and Administration

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WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 09028.001.18426</b> <b>Essential Record</b>	<b>Policies and Procedures - Administrative Functions</b> Records relating to the development, implementation, and interpretation of the policies and procedures developed by sub-units of the university to support their internal administrative functions. May include: each adopted/approved version of policies and procedures and records documenting the development of policies and procedures. Does not include records of university-wide policies. Excludes records covered by: Work Instructions/Desk Manuals (GS 09001.001.18365).	<b>Retain for 6 years after superseded</b> <i>then</i> <b>Destroy</b>
<b>GS 09029.001.18441</b>	<b>Statistics and Logs</b> Information gathered while providing services to the public, students, or university employees. Used to track interactions and/or to provide information for reporting purposes	<b>Retain for 2 years after fiscal year</b> <i>then</i> <b>Destroy</b>
<b>GS 10001.001.18416</b> <b>ARCHIVAL RECORD</b> <b>Essential Record</b>	<b>Strategic Plans and Annual Reports</b> Reports and plans, such as strategic plans or annual reports, detailing the unit's goals, priorities, and achievements. May apply to plans/reports produced at any level, from a program unit to larger administrative division.	<b>Retain until end of fiscal year</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>
<b>GS 10016.001.18408</b> <b>ARCHIVAL RECORD</b>	<b>Studies and Final Reports</b> Studies and reports with department-, division-, or university-wide relevance, typically prepared in response to a specific charge or directive. May be the work of a group or individual. The extent of supporting documentation, (e.g., survey data or other cited materials) included with the final report may vary according to need.  For grant-related reports or studies, see the "Research" section of this schedule.	<b>Retain for 6 years after conclusion of study or report</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>

## Section 1: Governance and Administration

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WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 09030.001.18425</b>	<b>Studies and Reports, Working Papers/Development</b> Records relating to the development of reports and studies and to the conducting of studies with department-, division-, or university-wide relevance, typically prepared in response to a specific charge or directive. May be the work of a group or individual. May include survey data or other materials gathered and used in the studies.  For grant-related reports or studies, see the "Research" section of this schedule.	<b>Retain for 6 years after conclusion of study or report</b> <i>then</i> <b>Destroy</b>
<b>GS 09001.001.18365</b>	<b>Work Instructions and Desk Manuals</b> Routine day-to-day task/work instructions, desk manuals, etc. These are desk level interpretations of a policy or procedure.	<b>Retain until superseded</b> <i>then</i> <b>Destroy</b>

## WWU General Records Retention Schedule

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### Section 2: Student Progress and Support

*Managing and monitoring student progress towards credentials.*

WWU Disposition  
Authority Reference

Records Series Title/Description

Retention and Disposition Instructions

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#### **Student Progress and Support**

For records under this function, see the College and Department  
Records Retention Schedule.

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## WWU General Records Retention Schedule

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### Section 3: Student Socialization and Enrichment

*Providing for students' growth and learning outside of the classroom environment.*

WWU Disposition  
Authority Reference

Records Series Title/Description

Retention and Disposition Instructions

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#### **Student Socialization and Enrichment Records**

Records under this section are unique to individual offices and appear on office level retention schedules.

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# WWU General Records Retention Schedule

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## Section 4: Teaching and Learning

*Creating and delivering curriculum to students.*

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
	<b>Teaching and Learning</b> For records under this function, see the College and Department Records Retention Schedule.	

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## WWU General Records Retention Schedule

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### Section 5: Research

*Performing and managing research.*

#### Research Funding and Management

*Securing funding for and managing research projects.*

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 23004.001.19121</b>	<p><b>Grant Award Management File</b></p> <p>Records relating to grant projects and funds received and expended by the university, including any continuous grants.</p> <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> <li>• Notifications of grant awards, fiscal reports and supporting documentation;</li> <li>• Grant monitoring, audit reports, compliance reports;</li> <li>• Time keeping/time and effort reports and supporting documentation (if required);</li> <li>• Modification requests;</li> <li>• Related correspondence/communications.</li> </ul> <p>Excludes final deliverables/reports covered by:</p> <ul style="list-style-type: none"> <li>• Grant Final Product Deliverable (14-09-68638.0001.18569)</li> <li>• Sponsored Programs Narrative Reporting (14-09-68638.1.19125)</li> </ul> <p>Note: If federal retention requirements are shorter than 6 years, the records must still be retained for the minimum 6 years after end of grant period/cycle to satisfy state requirements.</p>	<p><b>Retain for 6 years after end of funding period/grant cycle and completion of all grant requirements for that cycle (such as federal retention requirements, submission of financial status report, etc.)</b></p> <p><i>then</i></p> <p><b>Destroy</b></p>
<b>14-09-68638.001.18569</b> <b>ARCHIVAL RECORD</b>	<p><b>Grant Final Product Deliverable</b></p> <p>Records or other final products required by the grant or sponsorship agreement and retained as a record of the deliverable. May include reports, studies, surveys, educational materials, audiovisual, photographic, multimedia content, etc., that constitutes the project deliverable as obligated by the grant or sponsorship agreement.</p>	<p><b>Retain for 6 years after end of grant period</b></p> <p><i>then</i></p> <p><b>Transfer to University Archives for historical appraisal and permanent retention</b></p>
<b>GS 23006.001.18562</b>	<p><b>Grant Proposal, Not Accepted</b></p> <p>Includes proposal describing nature and purpose of project, amount of funds requested, in-kind contributions, plan of work and other documents pertaining to grant proposals not funded.</p>	<p><b>Retain until no longer needed for agency business</b></p> <p><i>then</i></p> <p><b>Destroy</b></p>

## WWU General Records Retention Schedule

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### Section 5: Research

Performing and managing research.

#### Research Funding and Management

Securing funding for and managing research projects.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 23003.001.18648</b>	<b>Internal Research Support Funds</b> Records documenting the awarding of internal research support funds. Documents the allocation and monitoring of funds for various research projects, such as summer research grants, faculty development, project development, undergraduate and graduate research, and others. May include application for faculty and student funding stating type of research, letters of acceptance, and related correspondence.  <i>Copies of these records maintained by an office other than that awarding the grant are considered duplicate copies and have no retention requirement. However, original documentation of financial transactions should be kept according to the applicable retention period (see the Financial Management section of this schedule).</i>	<b>Retain for 6 years after termination of project or proposal rejection</b> <i>then</i> <b>Destroy</b>
<b>14-09-68638.001.19125</b> <b>ARCHIVAL RECORD</b>	<b>Sponsored Programs Narrative Reporting</b> If required by sponsorship agreement, and if retained by the institution, narrative reporting relating to sponsored programs, including annual, periodic, and final performance reports. May include any of the following: Program/project proposal (as accepted); periodic progress reports; and final performance reports.	<b>Retain for 6 years after end of grant period</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>

## WWU General Records Retention Schedule

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### Section 6: External Relations and Services

Providing services to the public and engaging them in the university's mission.

#### Events and Programs

Holding events and programs for both university and external groups.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 05008.001.18736</b>	<b>Event Planning and Logistics Documents</b> Records relating to planning and coordinating events that do not directly support a financial document and do not document the event itself. May include correspondence and other documents related to scheduling, venue set-up, and presenter/participant attendance.  Records generated from university-sponsored events should be held under the appropriate series in the "Events and Programs" section of this schedule.  Financial records relating to events must be held for the retention period prescribed under the "Financial Management" section of this schedule.  For event-related hold harmless agreements for both adults and minors, see the "Risk Management" section of this schedule.  For adult event participant registration records, see Non-Academic Registration Records (Adults) (GS 01050.001.18442). Minor participant registration records must be kept under Child-Related Program Compliance Records (GS 01050.001.18382).  For Children at Western compliance records for events or programs that include minors, see the records series Child-Related Program Compliance Records (GS 01050.001.18382).	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>

# WWU General Records Retention Schedule

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## Section 6: External Relations and Services

Providing services to the public and engaging them in the university's mission.

### Events and Programs

Holding events and programs for both university and external groups.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 05009.001.18396</b> <b>ARCHIVAL RECORD</b>	<b>Events - General</b> Records generated from university-sponsored events. May include agendas, publicity materials, and other documents presented or distributed at the event. May also include authorized photographic and audiovisual documentation. (Photographic and audiovisual materials will need to be accompanied by signed releases from subjects if they are to be re-used or retained for archival preservation.)  Logistical and planning materials, which do not directly support a financial record, are transitory and can be disposed of when no longer needed. See Event Planning and Logistics Documents (GS 05008.001.18736)  Financial records relating to events must be held for the retention period prescribed under the "Financial Management" section of this schedule.  For event-related hold harmless agreements for both adults and minors, see the "Risk Management" section of this schedule.  For adult event participant registration records, see Non-Academic Registration Records (Adults) (GS 01050.001.18442). Minor participant registration records must be kept under Child-Related Program Compliance Records (GS 01050.001.18382).  For Children at Western compliance records for events or programs that include minors, see the records series Child-Related Program Compliance Records (GS 01050.001.18382).	<b>Retain until administrative purpose served</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>
<b>GS 01050.001.18442</b>	<b>Non-Academic Registration Records (Adults)</b> Registration for non-academic classes, programs, or activities for adult participants. May include payment information, hold harmless agreements, or other documentation required to attend a non-academic Western-sponsored event or program.  <b>Non-Academic Registration Records (Minors)</b> Registration records for minors participating in events on campus must be held under Child-Related Program Compliance Records (GS 01050.001.18382).	<b>Retain for 6 years after end of activity, program, or class</b> <i>then</i> <b>Destroy</b>

## Section 6: External Relations and Services

### WWU General Records Retention Schedule

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### Section 6: External Relations and Services

*Providing services to the public and engaging them in the university's mission.*

#### Events and Programs

*Holding events and programs for both university and external groups.*

WWU Disposition  
Authority Reference

Records Series Title/Description

Retention and Disposition Instructions

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#### **Photographs and Audiovisual Materials**

Photographs and audiovisual materials should be retained according to the activity or function which they document. If uncertain how to classify these records, please contact University Archives.

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## WWU General Records Retention Schedule

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### Section 6: External Relations and Services

Providing services to the public and engaging them in the university's mission.

#### Outreach and Engagement

Creating and maintaining relationships with external groups.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 05006.001.18363</b> <b>ARCHIVAL RECORD</b>	<b>Newsletters and Bulletins</b> Newsletters produced by a unit for internal or external dissemination.	<b>Retain until administrative purpose served</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>
<b>GS 05010.001.18432</b>	<b>Public Outreach Records</b> Records of interaction with and outreach to the public and other stakeholders, where not covered by a more specific records series.	<b>Retain for 2 years after calendar year</b> <i>then</i> <b>Destroy</b>
<b>GS 05010.001.18428</b>	<b>Records of Relationships with Professional and Other External Organizations</b> Records relating to developing and maintaining cooperative working relationships with professional or other associations and entities related to a unit's subject area, where not covered by a more specific records series. May include copies of agendas, minutes, and conference proceedings not hosted, sponsored, or affiliated with Western; newsletters or notices of associations/organizations' activities; non-financial records relating to memberships in associations/organizations; related correspondence and communications. Excludes records documenting the payment of membership dues or fees covered by series in the "Financial Management" section of this schedule.	<b>Retain for 2 years after calendar year</b> <i>then</i> <b>Destroy</b>

## WWU General Records Retention Schedule

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### Section 6: External Relations and Services

Providing services to the public and engaging them in the university's mission.

#### Communications and Marketing

Marketing and communicating the university's mission.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 05003.001.18409</b> <b>ARCHIVAL RECORD</b>	<b>Communications and Media Coverage Files</b> Records documenting the creation and distribution of communications and publicity materials through various media. Includes articles, news clippings, news/press releases, audiovisual materials, photographs, and related publicity materials referencing the college, department, or program.	<b>Retain for 2 years after end of calendar year</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>
<b>GS 05006.001.18397</b> <b>ARCHIVAL RECORD</b>	<b>Marketing and Promotional Records</b> Records relating to the planning and/or execution of advertising and promotional activities. May include: marketing plans/strategies; records relating to the development of advertising campaigns and materials (such as original artwork, designs, storyboards, etc.); samples of advertising materials (regardless of format); records relating to the evaluation of campaigns and strategies; records relating to the design and selection of unit branding (such as logos, mottos, slogans, etc.); related correspondence and communications. Excludes: financial records, which are covered by records series in the "Financial Records" section of this schedule.  <i>Financial records relating to marketing and communications must be held for the retention period prescribed under the "Financial Management" section of this schedule.</i>	<b>Retain until administrative purpose served</b> <i>then</i> <b>Transfer to University Archives for historical appraisal and permanent retention</b>

## WWU General Records Retention Schedule

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### Section 7: Cultural Enrichment

WWU Disposition  
Authority Reference

Records Series Title/Description

Retention and Disposition Instructions

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#### **Cultural Enrichment**

Records under this section are unique to individual offices and appear on office level retention schedules.

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# WWU General Records Retention Schedule

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## Section 8: University Resource Management

Managing university resources

### Financial Management

Managing the university's financial resources.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 50008.001.18353</b>	<b>Budget and Funding Requests Preparation Materials</b> Materials gathered and used to prepare budgets and funding requests, as well as well as copies of requests submitted to a higher-level unit for funding.  <i>Since these records are not the final budgets (as approved by the State or uploaded into the university's financial system) they technically do not have any retention requirements. However, UARM recommends that these materials be kept for 3 years after the fiscal year for use in preparing future budgets.</i>	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
<b>GS 01001.001.18420</b>	<b>Budget Reconciliation and Monitoring Records</b> Financial records and reports used to reconcile and monitor expenses and income for a unit when the files contain unique transaction records that are not captured in an official university system (for example, original purchasing card receipts for purchases made outside of a university system). Copies of reports or other records that can be generated from or are stored in online university systems have minimal retention and should be held as Financial Records - Duplicate Copies (GS 50005.001.18394). However, if these duplicate records are filed with original financial documentation (such as purchasing card receipts), then this records series should be applied to the files to ensure the original documentation is held for the appropriate retention period.  <i>This retention period only applies to these records when original documentation (like purchasing card receipts) that is not uploaded into an online university system is included in the files. If no such materials exist in these reconciliation/monitoring records, then the retention period(s) for the other record type(s) will apply.</i>	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>
<b>GS 01001.001.18367</b>	<b>Cash Handling Records</b> Records relating to the receipt of cash by a university office for goods or services provided to students or the public. May include cash receipts or department deposit records.	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>
<b>GS 50005.001.18435</b>	<b>Contracts and Agreements (Office copies)</b> Office copies of contracts and agreements that are held by Contracts Administration.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>

## Section 8: University Resource Management

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### Section 8: University Resource Management

Managing university resources

#### Financial Management

Managing the university's financial resources.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
GS 50005.001.18394	<b>Financial Records - Duplicate Copies</b> Copies of financial records (created or received), provided the original documentation or information is contained in university systems. Also covers financial reports that can be regenerated from official university systems at a future date with the same results. This series does not cover purchasing card records, cash receipts, or external invoices that document transactions or parts of transactions made outside of official university purchasing systems.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 01001.001.18361	<b>Interdepartmental Invoices and Journal Voucher Documentation</b> Provides a record of charges to individual departments/offices for goods and/or services. These records support the journal vouchering process. Hard copy records of the journal vouchering process that are created in, or uploaded into, an approved online university system may be destroyed when no longer needed. Any documentation kept outside of the approved system must be kept for the retention period indicated here.	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>
GS 04007.001.18374	<b>Internal Audit Report</b> Office copies of the final audit results of specific university programs and/or fiscal activities, including the university's response.	<b>Retain for 6 years after matter resolved</b> <i>then</i> <b>Destroy</b>
GS 01001.001.18366	<b>Purchasing Card (Pcard) Documentation</b> Provides a record of PCard use, transaction approval and reconciliation. Includes receipts, packing slips, printed on-line orders/copy of order form, invoices and credit documentation.	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>
GS 01001.001.18375	<b>Receipt of Goods Documentation</b> Records of purchases not made through online university systems or any purchase records which are not uploaded to online university systems. Records of purchases which are uploaded to or created in approved, online university systems must also be kept for 6 years; however, that retention period applies to the data and files in the system, not to paper copies held in an office.	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>

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### Section 8: University Resource Management

Managing university resources

#### Financial Management

Managing the university's financial resources.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
GS 50005.001.18395	<b>Service Request Records - Duplicate Copies</b> Copies of requests for services from other WWU units. The unit providing the service has responsibility for retaining the official copy of the request in their records.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 50005.001.18328	<b>Travel Records</b> Office copies of records processed through official online university travel system. Includes travel authorization, arrangement, travel receipt documentation, and reimbursement of expenses (including advance payments). Records of travel not entered into approved online university systems must be kept for 6 years after the fiscal year in which the travel was completed (contact University Records Management for more information).  Receipts and other materials that are scanned into the official online university system may have additional retention requirements if funded by a grant or outside entity.  <i>The official copy of these records should be held in the university's approved online travel system. However, offices and/or travelers are responsible for maintaining original documentation of trips (i.e., receipts) to confirm acceptance of receipt scans in system or for as long as may be required for other purposes (e.g., records of grant sponsored travel may have retention requirements set by the grant or the granting agency, or university units may have internal policies governing how long travel records must be kept).</i>	<b>Retain until reimbursement has been paid</b> <i>then</i> <b>Destroy</b>
GS 07001.001.19088	<b>Travel Requests -- Outside of Travel System</b> Travel funding requests made outside of the travel authorization system (SAP Concur or TEM). May include eforms, emails, or other forms.	<b>Retain for 6 years after end of fiscal year in which travel was completed</b> <i>then</i> <b>Destroy</b>

## WWU General Records Retention Schedule

Disposition authority granted by the State Records Committee under RCW 40.14 on 6/3/2020.

### Section 8: University Resource Management

Managing university resources

#### Human Resources Management

Managing the university's human resources.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 03030.001.18405</b>	<b>Leave Records</b> Records relating to employee leave requests and approvals of attendance and leave. May include: requests, approvals, and denials for any form of leave, and leave usage tracking or reporting. Leave requests done via the e-form provided by Human Resources should be retained in the e-form system for the 6 year retention period. Any downloaded or printed copies of the e-form are considered duplicate copies with no retention requirements.	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>
<b>17-06-69053.001.18620</b>	<b>Letters of Recommendation</b> Letters of recommendation written for former employees or students.	<b>Retain for 3 years after fiscal year</b> <i>then</i> <b>Destroy</b>
<b>GS 03024.001.18376</b>	<b>Performance Evaluations – Supervisor Preparation</b> Records gathered by an employee's supervisor in preparation for employee's performance evaluation. May include: notes of performance, training and development; job assignments; other related documentation.	<b>Retain until completion of evaluation and resolution of any ongoing performance issues</b> <i>then</i> <b>Destroy</b>
<b>GS 03042.001.18403</b>	<b>Personnel Files (Office Copies)</b> Office-level personnel files for faculty and staff (both permanent and temporary), as well as volunteers. May include copies of personnel action forms, employee information forms, or payroll forms that are held by Human Resources. May also include items such as letters of recommendation, awards, or correspondence that are not held by HR.  Official personnel files are held by HR, and, for faculty, in the Provost's Office as well.	<b>Retain for 6 years after separation from unit</b> <i>then</i> <b>Destroy</b>
<b>GS 03042.001.18406</b>	<b>Personnel Files (Student Employees)</b> Personnel files for student employees of any funding-type. May include students' applications and employee information forms. May also include items such as letters of recommendation and workplace awards.	<b>Retain for 6 years after separation from unit</b> <i>then</i> <b>Destroy</b>

# WWU General Records Retention Schedule

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## Section 8: University Resource Management

Managing university resources

### Human Resources Management

Managing the university's human resources.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 03012.001.18404</b>	<b>Search and Recruitment Records</b> Records relating to the process of recruitment and selection of employees. May include: job announcements and postings; job description and qualifications; eligibility lists for specific positions; applications, resumes and test results; applicant profile data; scoring, ranking and selection criteria; interview questions and evaluations; background and criminal history checks; reference check questions and answers. Applications for hired employees should be held in their personnel files.  Unsolicited applications must be held under Unsolicited Employment Applications (Not Hired) (GS 03022.001.18371) for 2 years after received. Certain types of searches (e.g., presidential searches) may create additional records that have either long-term or permanent retention. These additional records may include a report or narrative of the search process, marketing and promotion records, community and stakeholder engagement, meeting records, and applicant pool demographics. In such cases, these additional records should be saved as Records of Committees, Councils, Task Forces, and Other Bodies (GS 10004.001.18332).	<b>Retain for 3 years after completion of recruitment/hiring process</b> <i>then</i> <b>Destroy</b>
<b>GS 03030.001.18358</b>	<b>Timesheets and Time Entry Records</b> Records documenting employee attendance and time that are held outside of the university's online timekeeping system. May include timesheets used to enter time by someone other than the employee, or signed timesheet adjustment forms.	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>
<b>GS 22007.001.18422</b>	<b>Training – Provided by Office</b> Records documenting training courses, seminars, workshops, etc., provided by an office to university employees. May include: copies of materials presented (PowerPoint slide deck, handouts, etc.); attendee lists or sign-in sheets documenting who attended; tests administered and results; course, seminar, and workshop evaluations, feedback, and surveys.  Note: Records documenting training received by employees are covered by Training Files – Employee (GS 22003.001.18369).	<b>Retain for 3 years after training provided</b> <i>then</i> <b>Destroy</b>

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### Section 8: University Resource Management

Managing university resources

#### Human Resources Management

Managing the university's human resources.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 22003.001.18369</b>	<b>Training Files – Individual Employee Files</b> Records documenting the training history of individual employees participating in training, orientations and staff development programs (if not included in their personnel files).	<b>Retain for 6 years after separation from agency</b> <i>then</i> <b>Destroy</b>
<b>GS 03022.001.18371</b>	<b>Unsolicited Employment Applications (Not Hired)</b> May include resumes, applications, correspondence, and other documents pertaining to unsolicited requests for employment not related to recruitment searches for specific positions.	<b>Retain for 2 years after received</b> <i>then</i> <b>Destroy</b>

## WWU General Records Retention Schedule

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### Section 8: University Resource Management

Managing university resources

#### Facilities and Equipment Management

Managing the university's physical resources.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 25001.001.18398</b> <b>Essential Record</b>	<b>Building/Facility Access Authorization</b> Records documenting the authorization of access at the department/office level for students and employees (including contractors and volunteers) to University buildings and facilities. May include key logs, key sign out sheets, or requests for access to buildings or specific areas. Requests submitted to the Lockshop are held by the Lockshop for the appropriate retention period. This series covers those records not held by the Lockshop.	<b>Retain for 6 years after termination of access</b> <i>then</i> <b>Destroy</b>
<b>GS 25007.001.18421</b>	<b>Entry/Exit Logs – Facilities</b> Records documenting the entry and exit of staff, contractors, volunteers, students, and visitors to university facilities (including secure areas). May include: keycard transaction logs, secure area logs (such as safe logs), and visitor books/logs.	<b>Retain for 6 years after fiscal year</b> <i>then</i> <b>Destroy</b>
<b>GS 21001.001.18359</b>	<b>Equipment History Records</b> Documentation pertaining to equipment owned or used by an office. May list specifications and contain warranties.	<b>Retain for 6 years after disposal of asset</b> <i>then</i> <b>Destroy</b>
<b>GS 50005.001.18412</b>	<b>Facilities Planning and Maintenance</b> Plans, correspondence and related materials that provide a record of alteration, construction, and maintenance of facilities used by a unit. Facilities Management and/or Facilities Development and Capital Budget hold the original copies of these records. This series is meant to cover units' reference copies of records and correspondence dealing with renovations or new construction. May also include unit copies of capital project requests (both major and minor).	<b>Retain until completion or cancellation of renovation or construction</b> <i>then</i> <b>Destroy</b>
<b>GS 07003.001.18414</b>	<b>Use of University Facilities, Equipment, and Vehicles</b> Records relating to allowing use of university assets (such as meeting rooms, other facilities, equipment, vehicles/vessels, etc.) by university staff (including contractors and volunteers), other agencies, students, clients and the general public. May include: bookings, reservations, or requests for use; check-in and -out logs; rental and use schedules; vehicle logs and usage data.  Does not include official contracts for use. Does not include requests that do not need to be approved.	<b>Retain for 3 years after asset returned/use completed</b> <i>then</i> <b>Destroy</b>

### Section 8: University Resource Management

#### WWU General Records Retention Schedule

## WWU General Records Retention Schedule

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### Section 8: University Resource Management

Managing university resources

#### Safety, Health, and Legal Compliance

Managing compliance with laws and regulations.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 01050.001.18352</b>	<b>Agreements, Hold Harmless (Adults)</b> Acknowledgment of risk and hold harmless agreement signed by adults participating in university activities, such as sports and recreational events and theatre productions. Holds university harmless from liability for injuries and/or damages not caused by negligence. May include hold harmless for field trips.	<b>Retain for 6 years after termination or expiration of agreement</b> <i>then</i> <b>Destroy</b>
<b>14-09-68610.001.18558</b>	<b>Agreements, Hold Harmless (Minors Under Age 18)</b> Acknowledgment of risk and hold harmless agreement signed by parents or others on behalf of minors under age 18 who participate in university activities, such as sports and recreational events, and special academic institutes and programs. Holds university harmless from liability for injuries and/or damages not caused by negligence. May include authorization for emergency treatment and acknowledgment that participant is responsible for medical costs in event of injury. May also include medication hold harmless agreement stating that WWU will not be held responsible for missed doses of medication or any consequences thereof.	<b>Retain for 6 years after minor reaches age 18</b> <i>then</i> <b>Destroy</b>
<b>GS 01050.001.18382</b>	<b>Child-Related Program Compliance Records</b> Records documenting Western-sponsored programs and events in which minors participate. Includes background checks on university representatives; permission slips/hold-harmless agreements signed by parents or guardians; participant registration records; registration of the program with the University; and records of trainings taken by University representatives (see University policy: POL-U5300.21). (This records series does not include medical records created by clinics and child-care centers on campus, or educational records of minors who are matriculated students at Western.) <i>Retention period is meant to ensure that records are kept until any minor participating in a Western program has reached the age of 18 plus an additional 6 years. This records series is based on the Contracts and Agreements records series, which governs the hold harmless agreements. Other documentation included in this records series is considered supporting documentation for this hold harmless agreement.</i>	<b>Retain for 24 years after calendar year</b> <i>then</i> <b>Destroy</b>



## WWU General Records Retention Schedule

Disposition authority granted by the State Records Committee under RCW 40.14 on 6/3/2020.

### Section 8: University Resource Management

Managing university resources

#### Safety, Health, and Legal Compliance

Managing compliance with laws and regulations.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 25009.001.19119</b>	<b>COVID-19 Screening Records</b> Records of screening done of individuals entering university locations for signs of infection. May include individuals' attestations of health. Does not include records of actual COVID-19 tests. These records may include personal health information, like temperatures and symptoms, and should be kept confidential.	<b>Retain for 30 days after date of document</b> <i>then</i> <b>Destroy</b>
<b>GS 09017.001.19087</b> <b>Essential Record</b>	<b>Safety Data Sheets (SDS)</b> Safety data sheets or allowed substitute records identifying hazardous chemical(s) by the chemical and common names(s) and listing all ingredients which have been determined to be health hazards in accordance with WAC 296-901-14014.  Note: Safety Data Sheets were formerly known as Material Safety Data Sheets prior to May 2014.	<b>Retain for 30 years after superseded or 30 years after chemicals are no longer used</b> <i>then</i> <b>Destroy</b>

## WWU General Records Retention Schedule

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### Section 8: University Resource Management

Managing university resources

#### Records Management

Managing the university's public records.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 11009.001.19095</b>	<b>Files Management Documentation</b> Records relating to the physical and intellectual control of the office's records. May include: files classification schemes/guidelines; inventories; records center transmittals/retrievals; master indexes, lists, registers, tracking systems, databases and other finding aids used to access records.  Excludes records covered by: Records Destruction Log (GS 11005.001.18429).	<b>Retain until no longer needed</b> <i>then</i> <b>Destroy</b>
<b>GS 11005.001.18429</b>	<b>Records Destruction Log</b> Logs and other records documenting the destruction of public records according to the retention schedule.	<b>Retain permanently; contact Archives for assistance</b> <i>then</i> <b>Destroy</b>
<b>GS 50005.001.18378</b>	<b>Records Retention Schedule (WWU Form)</b> Provides identification and disposition instructions for all records found in the office.  <i>University Archives and Records Management maintains copies of the official WWU retention schedule permanently.</i>	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
<b>GS 50005.001.18373</b>	<b>Records Transmittal</b> Provides an itemized list by box of records transferred to the University Archives and Records Management.  <i>University Archives and Records Management maintains these permanently.</i>	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>

## WWU General Records Retention Schedule

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### Section 8: University Resource Management

Managing university resources

#### Information Systems Management

Managing the university's information systems.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 14012.001.19089</b> <b>Essential Record</b>	<b>Systems Access Authorization</b> Records documenting the authorization of employees (including contractors and volunteers) to use unit systems/applications and telecommunication services. May include user account creation/change requests or network access authorization requests.  <i>Retention applies to copies of records held by unit granting access to the system. Copies held by those receiving or requesting access are considered duplicate copies and have no retention requirements.</i>	<b>Retain for 6 years after fiscal year in which user account/access was terminated then</b> <b>Destroy</b>
<b>GS 50010.001.18492</b>	<b>Website Traffic Data</b> Statistics and data collected regarding traffic on the university's websites.  <i>If the data becomes part of a report or formal analysis, it must be retained according to the applicable retention schedule.</i>	<b>Retain until no longer needed for agency business then</b> <b>Destroy</b>

## WWU General Records Retention Schedule

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### Section 8: University Resource Management

Managing university resources

#### Public Safety

Policing and providing security for the university.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 25008.001.18649</b>	<b>Security Incidents and Data/Privacy Breaches</b> Records documenting security incidents, data/privacy breaches, responses and investigations relating to agency facilities, vehicles, equipment, supplies, information, etc.  Includes, but is not limited to: Incident documentation (such as security recordings, alarm logs/reports, entry/exit logs, incident reports, witness statements, etc.); Notification documentation; Reports to law enforcement agencies, agency management, regulating authority, etc.; Records documenting services provided by outside vendors (such as notifications, credit monitoring, call center reports/logs/notes, etc.); Records documenting corrective action taken; Records documenting decision not to proceed with investigation/notification; Related correspondence/communications.	<b>Retain for 6 years after matter resolved</b> <i>then</i> <b>Destroy</b>
<b>GS 25003.001.18650</b>	<b>Security Monitoring – No Incident</b> Records relating to the routine security monitoring of the agency's infrastructure, buildings, vehicles, equipment, etc., where an incident has not occurred.  Includes, but is not limited to: Alarm reports; Audio/visual recordings (digital or analog); Security patrol logs.  Excludes records covered by Security Incidents and Investigations (GS 25008.001.18649).	<b>Retain for 1 month after date record created or until determined that no security incident has occurred, whichever is sooner</b> <i>then</i> <b>Destroy</b>

## WWU General Records Retention Schedule

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### Section 8: University Resource Management

Managing university resources

#### Intellectual Property Management

Managing the university's intellectual property.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 21001.001.18446</b>	<b>Copyright/Trademark Registrations</b> Records of registering trademarks or copyright for University-owned intellectual products.	<b>Retain for 6 years after copyright or trademark expires then Destroy</b>

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## WWU General Records Retention Schedule

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### Section 9: Records and Information with No Retention Requirements

Records and information with no retention requirements.

#### Transitory Records

Records that do not have retention requirements beyond the usefulness of the information.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
<b>GS 50007.001.18658</b>	<b>Contact Information</b> Records relating to the contact details for Western community members the university has gathered/received and the maintenance of such lists/collections.  Includes, but is not limited to: Business cards; Contact details stored in Microsoft Outlook and other contact databases; Mailing lists, email distribution lists, listserv/RSS subscriber details, etc.; Requests to be added/removed from the agency's contact lists (includes mail/communications returned as undeliverable); Quality assurance checks; Related correspondence/communications.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
<b>GS 50008.001.18659</b>	<b>Drafting and Editing</b> Records relating to the drafting/editing of correspondence, documents and publications.  Includes, but is not limited to: preliminary drafts not covered by a more specific records series, not needed as evidence of external consultation or as evidence that the agency practiced due diligence in the drafting process; edits/suggestions/directions (such as handwritten annotations/notes, track changes information/comments in Microsoft Word, etc.); electronic documents created solely for printing (such as signs, mailing labels, etc.); related correspondence/communications.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
<b>GS 50004.001.18660</b>	<b>General Information – External</b> Information received from other agencies, commercial firms or private institutions, which requires no action and is no longer needed for agency business purposes.  Includes, but is not limited to: catalogs, reports, multi-media presentations (videos, CDs, etc.); informational copies, notices, bulletins, newsletters, announcements; unsolicited information (junk mail, spam, advertisements, etc.).	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>

### Section 9: Records and Information with No Retention Requirements

#### WWU General Records Retention Schedule

## WWU General Records Retention Schedule

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### Section 9: Records and Information with No Retention Requirements

Records and information with no retention requirements.

#### Transitory Records

Records that do not have retention requirements beyond the usefulness of the information.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
GS 50001.001.18661	<b>Informational Notifications/Communications</b> Records communicating basic/routine short-term information (regardless of format or media used) that: do not document agency decisions/actions; are not used as the basis of agency decisions/actions; and are not covered by a more specific records series.  Includes, but is not limited to: basic messages such as "Come and see me when you're free," "Call me back at (360) 555-5555," etc.; internal communications notifying of staff absences or lateness (such as "Bob is out today," "Mary is running late," etc.), provided the appropriate attendance and leave records are retained in accordance with Leave Records (GS 03030.001.18405); internal communications notifying of staff social events/gatherings (such as potlucks, birthdays, fun runs, cookies in the break room, etc.) or of weather/traffic conditions (such as "Avoid I-5, it's a parking lot," "Take care – it has started snowing," etc.); email delivery/read receipts, out-of-office notices, etc.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 09024.001.19113	<b>Meeting Arrangements</b> Records relating to arranging and scheduling meetings, such as agenda calls, meeting invitations, or location arrangements.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 09026.001.18673	<b>Meeting Notes</b> Notes taken during or about meetings for personal use only, or copies of meeting agendas or minutes used for reference only.  Does not include the official copy of meeting minutes or agenda, which are held by the meeting convener or designated records holder.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 50011.001.19096	<b>Organizing/Monitoring Work in Progress</b> Records relating to the assigning, prioritizing, tracking/monitoring and status of work/projects in progress. Includes, but is not limited to: status logs; to-do lists; tasks within Microsoft Outlook, etc.; routing slips; workflow notifications/escalations.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>

### Section 9: Records and Information with No Retention Requirements

#### WWU General Records Retention Schedule

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### Section 9: Records and Information with No Retention Requirements

Records and information with no retention requirements.

#### Transitory Records

Records that do not have retention requirements beyond the usefulness of the information.

WWU Disposition Authority Reference	Records Series Title/Description	Retention and Disposition Instructions
GS 50013.001.18662	<b>Reference Materials</b> Materials gathered from outside sources for reference/reading use which are not evidence of the agency's business transactions.  Includes, but is not limited to: conference materials (such as proceedings, handouts, etc.) from conferences/seminars not organized by the agency; copies of published articles, reports, etc.; internet browser favorites/bookmarks; listserv/RSS feeds.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 50002.001.18663	<b>Requests for Basic/Routine University Information</b> Internal and external requests for, and provision of, routine information about the operations of the university, such as: business hours, locations/directions, web/email addresses; meeting dates/times.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 50005.001.18664	<b>Secondary (Duplicate) Copies</b> Copies of records (created or received), provided the agency retains its primary copy of the record in accordance with the current approved minimum retention period.  Includes, but is not limited to: Data extracts and printouts from agency information systems; Cc's of emails, provided the agency is retaining its primary copy of the email; Convenience/reference copies of records; Duplicate and near-duplicate images/photographs provided the selected "best" image(s) documenting the occasion/object is retained.	<b>Retain until no longer needed for agency business</b> <i>then</i> <b>Destroy</b>
GS 50015.001.18665	<b>Unsolicited Additional Materials</b> Additional materials received by the agency that are: not requested and not used by the agency in the course of government business.  Includes, but is not limited to: superfluous extra materials provided with applications (including health/medical records); information entering through online applications, e-forms, etc., but not completed and not submitted to the agency.  Excludes Unsolicited Employment Applications (Not Hired) (GS 03022.001.18371)	<b>Retain until Upon receipt, return to sender or destroy.</b> <i>then</i> <b>Destroy</b>

### Section 9: Records and Information with No Retention Requirements

#### WWU General Records Retention Schedule