



PROGRAM NOTICE: PN-5
SUBJECT: Archiving File Procedure
EFFECTIVE: 08/16/2017
REVISION: 09/15/2017, 08/22/2024

Background

The intent of this procedure is to provide instructions on the archiving process for Workforce Innovation and Opportunity Act (WIOA) program participant files. Statewide Data Validation is conducted on an annual basis and accurate record keeping is essential in-order to locate and retrieve participant files when needed.

Files to Archive

- All confidential files (medical/criminal background) must follow the procedure below.
- Any documentation regarding complaints related to WIOA must follow the procedure below.

Note: All electronic files are automatically archived in the state MIS System, no further action is required on these files.

Archiving Procedure

1. Any hard copy documents must be placed in a file folder.
2. All file folders must be labeled. Labels should be typed and placed on the tab of each file folder. Each label must contain the participant's last name, first name, ETO #, exit date and program name as illustrated below.

Last name, First name
ETO#
Exit Date
Program

- Archived files must be transferred from WSCB to the Benton-Franklin Workforce Development Council (BFWDC) between September 1st - September 30th.
- The WIOA Programs Manager must call the BFWDC in advance to coordinate a time to drop off archived files.
- The BFWDC will store files in a locked cabinet until they are able to be shredded.

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