Records Management Guidance

Shared Drive Clean-Up Project Toolkit

4. Records Past Retention

What is Disposition? Disposition (destruction or transfer to King County Archives) of records that have fulfilled their retention requirements.

Why is this important? Properly documented disposition is required by County policy and ensures defensible disposition practices, that is, it demonstrates compliance.

Determine whether records have met their end of their retention

- Determine if the records have reached the end of their retention period.
- Records retention requirements can be found on a <u>records retention schedule</u>.
- Check to ensure that records are not subject to public records requests, litigation, audits, or government investigations. If so, they cannot be dispositioned yet.

Delete transitory records:

- Identify electronic records that are considered <u>transitory</u> and NOT still actively used for reference purposes.
- Transitory record types do not require destruction approval. These can be deleted at any time.

File potentially archival or archival records to Content Manager

• If you have any electronic records that are past retention and are in a category that is potentially archival or archival, the **only** acceptable way to disposition them is to file them to Content Manager. From there, they will be dispositioned within Content Manager to have their custody transferred to the King County Archives for appraisal.

Complete a Disposition Request Form for all non-archival records

- Identify records that have passed their retention requirements and are NOT archival (Use the Retention Schedule, column 7d).
- Complete a <u>Disposition Request Form</u> in Content Manager (complete one form per category)
- After approval and confirmation from Records Management, delete all electronic records on the approved disposition request form.

