



Content Manager Guidance

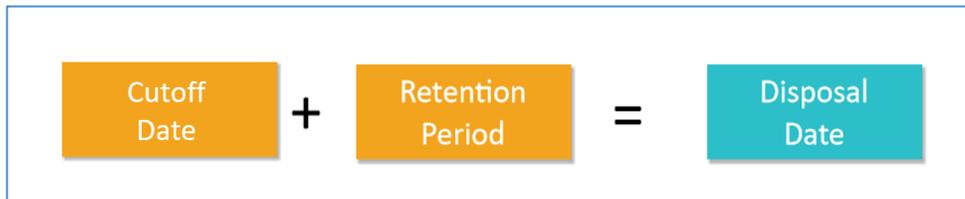
Cutoff Dates

When creating a **digital folder** or **box** in Content Manager you must enter the Cutoff Date for the retention to be calculated correctly. Do **not** add or calculate the retention period yourself; the system will do the math for you!

PRO TIP: If the records are still active and have not yet met their cutoff date or you do not know when it will happen, leave the Cutoff Date blank and add it in later.

What is the Cutoff Date?

The cutoff date is the date that records become **inactive**. For most records, this is when they are **no longer used for the reason they were created** and are not accessed frequently.



How do I know what to enter for the Cutoff Date for a new folder or box?

Instructions for entering the cutoff date are listed on your [retention schedule](#) (in the “**Cutoff**” column).

That same information is also listed in Content Manager. Follow [Category Guidelines](#) to locate the appropriate Retention schedule. Then locate the “**Retention Cutoff**” field.

Schedule Number	Title	Retention Cutoff
Combo Rule ACO-01-001	GENERAL OFFICE COMMUNICATIONS, MEETINGS AND WORKING FILES	End of Calendar Year

Schedule Number	Combo Rule ACO-01-001
Title	GENERAL OFFICE COMMUNICATIONS, MEETINGS AND WORKING FILES
Schedule Description	Records created, received and used when communicating within and outside the county correspondence (not executive, elected officials or department heads); meeting minutes and working files containing copies of information for reference (not governing, advisory, ex Working Files), GS50-01-08 (Chronological Reference Files), GS50-01-43R2 (Staff Meetings Arrangements).
Archival Status	Not Archival
Retention Cutoff	End of Calendar Year
Retention Period	2 years





How do I know what to enter for a folder or box that already exists?

All users can edit a cutoff date for an existing box or folder.

1. **Click/select** the folder or box in Content Manager
2. In the bottom details pane, **double click** on the **Retention schedule** field

Record Number	Title (Free Text Part)	Date Created	Date Filed
B447775	ABC Project	12/31/2000	11/18/2020 at 4

Record Number	B447775
Box Title	ABC Project
Box Notes	
Category	DES-RALS-(ARMMS) Archives, Records Management and Mail Services - Project Files
Owner (Organization)	DES-RALS-(ARMMS) Archives, Records Management and Mail Services
Box Start Date	Saturday, January 1, 2000
Box End Date	Sunday, December 31, 2000
Cutoff Date	Sunday, December 31, 2000
Agency Number	
Creator	Wadleigh, Ryan
Date Created	Sunday, December 31, 2000
Date Filed	Wednesday, November 18, 2020 at 4:23 PM
Assignee	At home: Wadleigh, Ryan since Wednesday, November 18, 2020 at 4:23 PM
Home	Wadleigh, Ryan
Home Status	At location
Movement History	Click to display
Legacy Circulation History	
Retention schedule	GS50-01-39R1 PROJECT FILES (MISCELLANEOUS) Action Summary: Keep Forever Archive (Transfer Custody) 6 years after Date Closed
Scheduled Disposal Method	Archive (Custody Transfer): Sunday, December 31, 2006
Consignment Number	

3. The guidance for what to enter for the Cutoff Date is listed as **Retention Cutoff**

Schedule Number	Title
GS50-01-39R1	PROJECT FILES (MISCELLANEOUS)

Schedule Number	GS50-01-39R1
Title	PROJECT FILES (MISCELLANEOUS)
Schedule Description	Records relating to agency projects where not covered by a mo series in CORE or sector schedules.
Archival Status	Potentially Archival
Retention Cutoff	Completion of project
Retention Period	6 Years

4. Make changes as needed. (Refer to separate [Edit a Box](#) or [Edit a Folder](#) job aids)

