














Records Management Guidance

Physical Records Management Overview

First, determine whether the records are transitory or have retention value.

<p>Transitory (duplicate copies, blank forms, printed reference material, etc.)</p> 	<p>Recycle Transitory records can be destroyed without documentation.</p> 
<p>Retention Value (official records that are not transitory)</p> 	<p>See table below...</p>

Then, for everything that is *not* transitory, refer to the table below.

<p>Active (Still being used or accessed for the reason they were created. Have not yet met their cutoff date.)</p> 	<p>Store Onsite Ensure that records are safe, secure and accessible. Best practice is to index active records using a tool like a spreadsheet or entering boxes in Content Manager.</p> 	<p>OR</p>	<p>Digitize Use an approved Disposition After Digitization application to scan records, retain the images for their retention period, and destroy the paper originals.</p> 
<p>Inactive (Have met their cutoff date and are no longer used or accessed frequently. They are still within their retention period and cannot be disposed.)</p> 	<p>Send to the Records Center Inactive boxes must be entered in Content Manager. All records must meet Records Center requirements.</p>  <ul style="list-style-type: none"> • at least one year left of retention period • one category per box • only approved box and labels • no binders, hanging file folders, or binder clips 		
<p>Past Retention (Have met their retention period as defined on a retention schedule.)</p> 	<p>Destruction Form (non-archival only) Fill out a form: you can either destroy the records yourself or have the Records Center destroy them for you.</p> 	<p>OR</p>	<p>Archival Transfer (archival or potentially archival) The Archives can take custody of archival records past their retention period.</p> 





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Retention Schedules

The best tool for helping to determine where records fall in the table on the previous page, refer to the [appropriate retention schedule](#).

TITLE/DESCRIPTION	REMARKS	OFFICE OF PRIMARY COPY	CATEGORY	RULE (DISPOSITION AUTHORITY NUMBER)
Project Files Records relating to agency projects when not covered by a more specific records series in King County General Retention Schedule or agency specific schedules.	Cutoff: completion of project Retention: 6 years		Project Files ACO-02-001	GS50-01-39R1

Use the info in the **Title/Description** field to determine which **category** the records belong in.

Use the **Cutoff** field to determine when a record becomes **inactive**.

Use the **Retention** field to determine when a record can be **disposed of**.

Use the **Disposition Action** field to determine whether to submit a **destruction form** or contact the **Archives**

Other Resources

[Records Management Leads](#) – for records management questions specific to your agency and business needs

[Records Management Program](#) – for questions that your Records Management Lead cannot answer

[Sample High-Level Inventory Form](#) – optional spreadsheet you can use to provide a high-level overview of the types of records and what to do with them

[Sample Box-Level Inventory Form](#) – optional spreadsheet you can use/customize to inventory/index boxes

[Sample Records Clean-up Checklist](#) – optional checklist of resources and reminders

[Records Center Box Packing Guide](#) – instructions on how to pack boxes for storage at the Records Center

