



# Content Manager Guidance

## Cutoff Date Guidelines

When creating a **digital folder** or **box** in Content Manager you must enter the Cutoff Date (previously Date Closed) 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 don't *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.

The Date Closed [i.e. Cutoff Date] is very important. It is the trigger that *begins* the retention period.

The date entered is what the system uses to calculate the retention period, so it **must be entered correctly**.

$$\begin{array}{c} \text{Cutoff} \\ \text{Date} \end{array} + \begin{array}{c} \text{Retention} \\ \text{Period} \end{array} = \begin{array}{c} \text{Disposal} \\ \text{Date} \end{array}$$

### 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](#) (refer to the “**Cutoff**” field in the “Retention” column for each record).

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

Schedule Number	Title	Retention Period Cutoff	Retention Period
Combo Rule ACO-01-001	GENERAL OFFICE COMMUNICATIONS, MEETINGS AND WORKING FILES	Year end	2 Years

  

Schedule Number	Combo Rule ACO-01-001
Title	GENERAL OFFICE COMMUNICATIONS, MEETINGS AND WORKING FILES
Notes	Records created, received and used when communicating within and outside the county on general top minutes and agendas (not governing or advisory council, commission or board); calendars; administrative and notices; mailing lists. Contains records from , GS50-01-02 (Administrative Working Files), GS50-01- Arrangements).
Retention Period Cutoff	Year end
Retention Period	2 Years
Archival Status	Not Archival





# Content Manager Guidance

## Cutoff Date Guidelines

### 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	G550-01-39R1 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 Period Cutoff**

Schedule Number	Title
G550-01-39R1	PROJECT FILES (MISCELLANEOUS)

  

Schedule Number	G550-01-39R1
Title	PROJECT FILES (MISCELLANEOUS)
Schedule Description	Records relating to agency projects where not covered by a more specific records series
Essential Record	N
Retention Period Cutoff	Completion of project
Retention Period	6 Years
Archival Status	Subject to Archival

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

