

WHAT IS A RECORDS RETENTION SCHEDULE?

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A records retention schedule is a written statement of actions to be taken with respect to all records produced or maintained by the department. It assists the department in effecting the prompt disposal of records no longer needed, the storage of records that must be retained temporarily after they are no longer needed for current operations, and the preservation of records which are of historical value.

A schedule will:

1. Cover all records created and maintained by the unit.
2. Provide an accurate description of each record series.
3. State the number of years (retention period) for which each record series should be retained in the office, department, and/or records center space before destruction or transfer to the State Archives.

A properly prepared schedule should be used daily as a training aid, as a resource for purging instructions, and as a reference before disclosing contents of records. It can be used to track increases in workloads, changes in procedures, and reorganizations. Most importantly, records schedules are planning devices that provide the legal basis of departmental records (and information) treatment and destruction. It is also used to plan for State Records Center (SRC) use, imaging activities, vital records protection, and enables the Office of State Archives to identify historically significant records. Schedules make sure decision-makers have information as long as it is needed and help avoid keeping records longer than the information is worth in storage and maintenance costs.

FORMS AND/OR FORMS SAMPLES: RETURN TO ISSUANCE HOME PAGE FOR FORMS/FORMS SAMPLES SITE LINK.

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