

## Using Records Retention Schedules: How to Determine the Correct Records Series

**Purpose: Provide guidance to state agencies and local government entities on how to match their records to the correct records series in a records retention schedule.**

When determining the retention of a particular record (or group of records), the following questions can help refine the search:

- 1. What information does this record contain? What are alternate ways of describing this content?**  
The particular names or terms an agency uses for its records may not be present in a records retention schedule, but it is still likely that applicable records series exist based on the record's content. Similarly, a search for the retention of a specific format of record, such as email or social media, will not likely return the correct result. There is no one retention period for all email, social media, database, or other electronic records; retention depends on the content and purpose of a particular record.
- 2. Why was this record created, received, or used? What agency work does it document? What overall function does it serve for the agency?**  
The State Archives attempts to create as many function-based, "big bucket" records series as possible. These series are meant to "catch" the majority of records relating to a specific agency function, transaction, or decision. The goal is to identify all records that provide evidence of a particular agency activity and retain them for the same period of time.

Here are examples of guiding questions to help determine the functions of common types of records:

- **Does this record document an agency financial transaction? Is money being exchanged in some form (payment, reimbursement, collection, grants, etc.)?**
  - **State agencies:** See Section 3.1: Financial Management—Accounting and Fiscal of the State Government General Records Retention Schedule (SGGRRS)
  - **Local agencies:** See Section 3.1: Financial Management—Accounting of the Local Government Common Records Retention Schedule (CORE).
- **Does this record document a contract or written agreement between an agency and an employee, vendor, outside entity, etc.?**
  - **State agencies:** See Section 3.4: Financial Management—Contracts and Purchasing of SGGRRS.
  - **Local agencies:** See Section 1.5: Agency Management—Contracts/Agreements of CORE.
- **Does this record document agency recruitment or management of staff, board members, volunteers, etc.?**
  - **State agencies:** See Section 4: Human Resource Management of SGGRRS.
  - **Local agencies:** See Section 4: Human Resource Management of CORE.
- **Does this record document the acquisition, maintenance, certification, etc. of an agency's real property or physical/intangible assets (including equipment, vehicles, and easements)?**
  - **State agencies:** See Section 2: Asset Management in SGGRRS
  - **Local agencies:** See Section 2: Asset Management in CORE

**Additional advice regarding the management of public records is available from  
Washington State Archives:**