

Using Records Retention Schedules: What Does “Until No Longer Needed for Agency Business” Mean?

Purpose: Provide guidance to state agencies and local government entities on how to apply the commonly used retention period “Until no longer needed for agency business”.

What Does This Mean?

When records retention schedules have a retention of “Until no longer needed for agency business”, this means that:

- There are **no identified audit/legal retention requirements**;
- The retention need is **based on the agency’s business need** for the record, which **may vary** from agency to agency and from one type of record to another;
- It is **not the same as zero retention** – the agency’s business need for the record may be very short or quite long.

How Should It Be Applied?

In order for retention to be applied consistently and systematically (both across the agency and over time), agencies should:

1. **Determine what the business need is** for particular types of records in particular business units within the agency;
2. **Calculate the timeframe** that satisfies those business needs;
3. **Document** both the business needs and timeframes **in agency policies/procedures**.

When determining the **business need for “Archival” records**, the agency should consider that:

- a) The records will **remain accessible** to the agency even after transfer to the Archives; and
- b) The earlier the records can be transferred, the sooner the records can **benefit from the Archives’ long-term preservation methods** to ensure access (especially for electronic records).

Therefore, business needs should be limited to just the **specific, shorter-term needs to access** the records.

As agencies implement Enterprise Content Management (ECM) systems, these documented business needs will inform the business rules that can be used to calculate appropriate destruction/transfer dates.

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

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov**