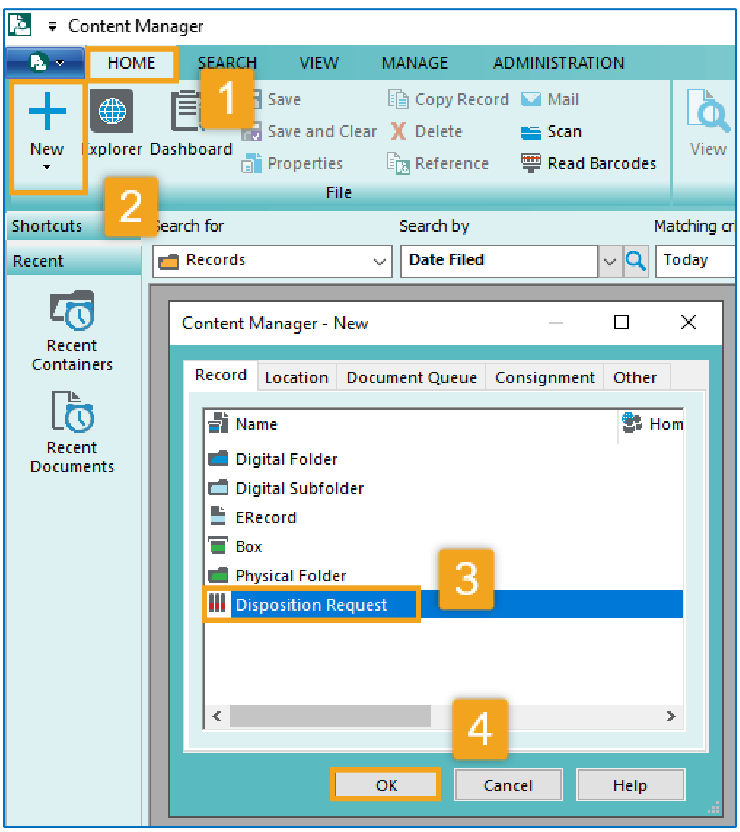
Content Manager (CM) Guide

How to Create a Disposition Request

Use this form to request approval for and to document the disposition of any public records that are **not** stored in Content Manager or at the Records Center.

What to use this for:	**What not to use this for:**
- Deletion of **non-archival electronic records** and data - Destruction of **non-archival physical records** (either by yourself, a vendor, or the Records Center) - Transfer of **potentially archival or archival physical records** to King County Archives	- **Potentially archival or archival electronic records** (instead, file to CM) - **Records already in CM** or at the **Records Center** (they will go through an annual disposition process from CM) - **Transitory records** (they can be destroyed without documentation)

Fill out **one** form **per category**. Do not combine records from multiple categories, but you can combine records onto one form if they are in the same category and the entered cutoff date is the latest date applicable to the records.



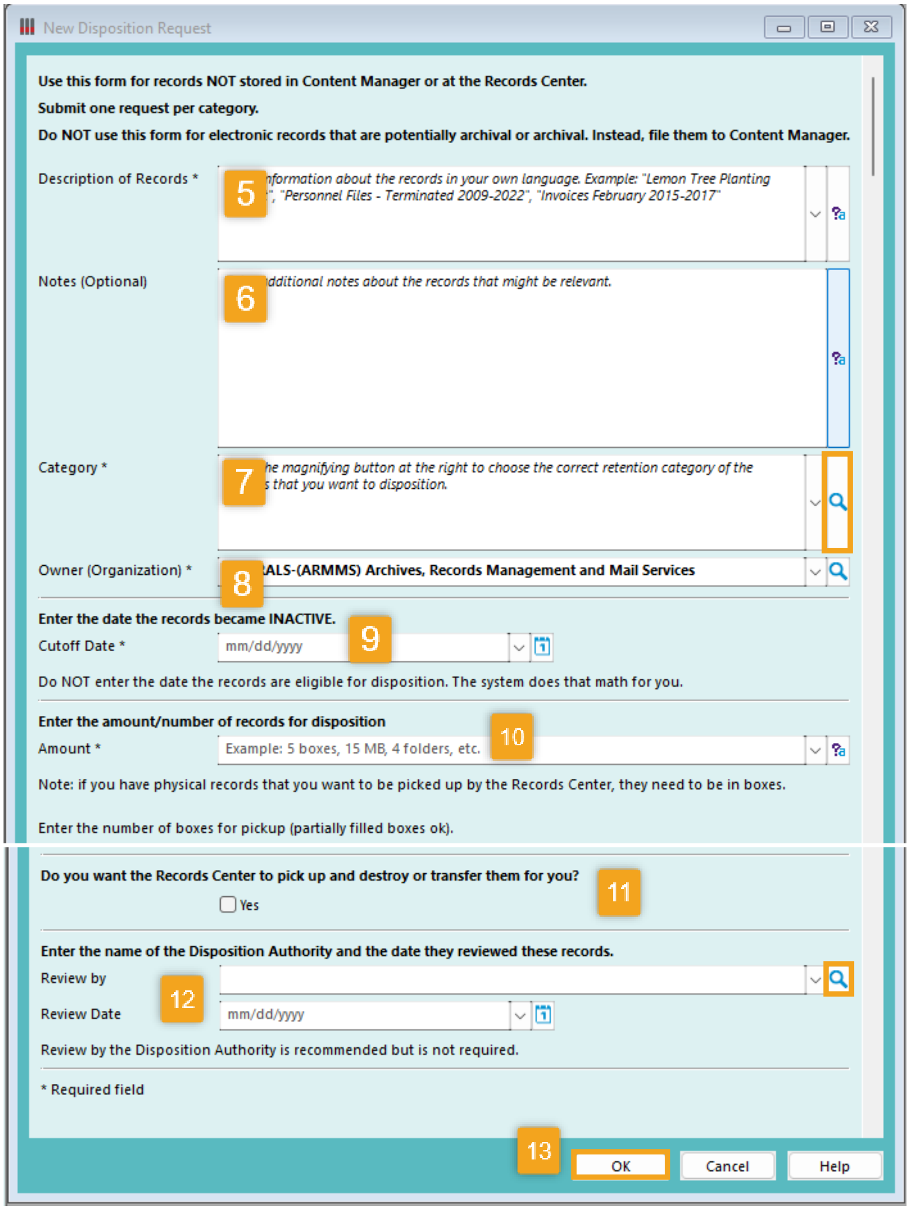
1. Click **HOME tab**

2. Click **Plus Sign (+)**

3. Select **Disposition Request**

4. Click **OK**

[continued next page]



New Disposition Request

Use this form for records NOT stored in Content Manager or at the Records Center.

Submit one request per category.

Do NOT use this form for electronic records that are potentially archival or archival. Instead, file them to Content Manager.

Description of Records * — 5 — *nformation about the records in your own language. Example: "Lemon Tree Planting ", "Personnel Files - Terminated 2009-2022", "Invoices February 2015-2017"*

Notes (Optional) — 6 — *dditional notes about the records that might be relevant.*

Category * — 7 — *he magnifying button at the right to choose the correct retention category of the s that you want to disposition.*

Owner (Organization) * — 8 — **ALS-(ARMMS) Archives, Records Management and Mail Services**

Enter the date the records became INACTIVE. 9

Cutoff Date * mm/dd/yyyy

Do NOT enter the date the records are eligible for disposition. The system does that math for you.

Enter the amount/number of records for disposition 10

Amount * Example: 5 boxes, 15 MB, 4 folders, etc.

Note: if you have physical records that you want to be picked up by the Records Center, they need to be in boxes.

Enter the number of boxes for pickup (partially filled boxes ok).

Do you want the Records Center to pick up and destroy or transfer them for you? 11

Yes

Enter the name of the Disposition Authority and the date they reviewed these records.

Review by 12

Review Date mm/dd/yyyy

Review by the Disposition Authority is recommended but is not required.

* Required field

13 OK Cancel Help

5. Enter a brief **Description of Records**

6. Enter **Notes** (Optional) - other details that do not fit above

7. Select a **Category** using the **magnifying glass lookup button** to display all options <u>or</u> with the **down arrow** to display previously used categories

8. Select an **Owner (Organization)** using the **magnifying glass lookup button** (Only change if needed)

9. Enter the **Cutoff Date** (the date the records became inactive; the <u>start</u> of the retention period)

10. Enter the **Amount** (enter the volume, amount, or size of the records. For physical records for pickup, this must be in "Boxes".)

11. Under **Do you want the Records Center to pick up ...?** Check Yes if so. If not, leave blank.

12. Choose the name of the **Disposition Authority** (magnifying glass) and enter the **date** they reviewed, if applicable.

13. Click **OK**

[continued next page]

What happens next?

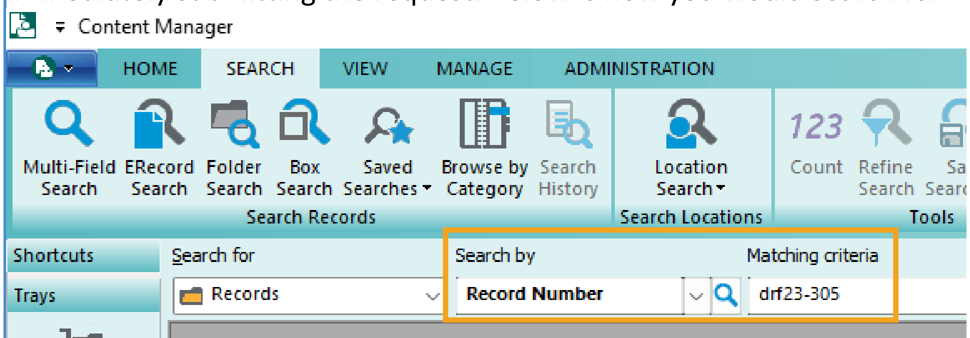
As soon as the request is submitted, a window will open in Content Manager which will show the request that was just submitted. Each request is automatically assigned a Record Number (e.g. DRF23-305) as soon as it is created. Take note of that Record Number, as it can be used to track the request over time.

ARMMS staff will review the request and there is nothing else you need to do unless they have questions about the request. They will contact you when the records are ready to be picked up *or* when they are ready for destruction or transfer. For questions, contact records.management@kingcounty.gov or 206-477-6889.

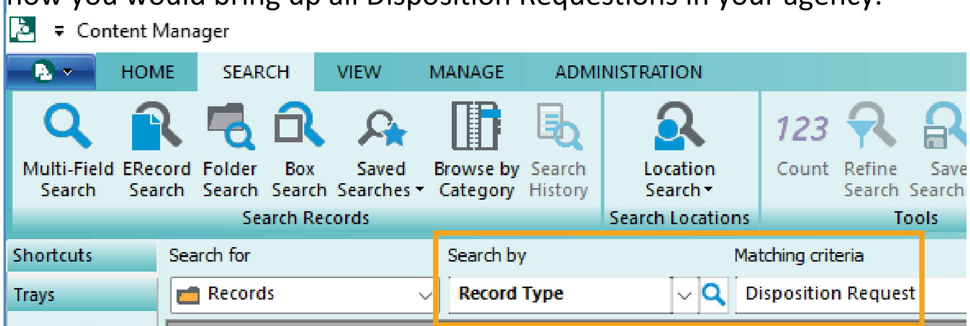
Note that disposition requests must be finalized within 4 months after submittal. If requests have not been finalized before that time, they will be deleted and can be resubmitted if needed.

How do I look up an existing Disposition Request?

The simplest way to locate an existing disposition request, is by searching the **Record Number** you received immediately submitting the request. Below is how you would search for Disposition Request # DRF23-305:



If you don't know the record number, you can instead search for Record Type = Disposition Request. Below is how you would bring up all Disposition Requestions in your agency.



How is the Disposition Authority supposed to review and sign this?
It is in your agency's best interest to have your Disposition Authority review this request before submittal. There is **no signature** on the form and their approval is not required, but there is a section to enter their name and the date they reviewed the request. If the Disposition Authority has already reviewed the records, enter their name and the date when you fill out the form, or you can leave that information blank and fill it in later.