



# Records Management Guidance

## Managing Records in DocuSign

DocuSign is King County's contracted e-signature platform. Documents created using DocuSign are official King County records and must be managed according to their legal retention requirements. DocuSign shall not be used as a file storage solution or as the final repository for the purpose of retaining records.

Upon the completion of the transaction, the responsible owner of the record should download both the completed document(s) and the accompanying certificate of completion to provide a digital audit trail. Records should be filed to Content Manager to live out their retention and disposition requirements.

### What is the retention of DocuSign records?

The retention of records is dependent upon the function and content of the records. Consult the [King County Retention Schedules](#) to identify which record series apply.

### Records produced from DocuSign

- **Fully executed documents:** Only the final, fully executed document is considered the official record. The retention of these varies depending upon the function/purpose of that record. Examples include: Policies, Contracts and Agreements, Capital Improvement Project related contracts, etc. Refer to a county records retention schedule to locate a series appropriate for your record.
- **Certificate of completion:** This should also be downloaded and stored with the fully executed document. This will act as supporting document and provide a digital audit trail. This should be retained with the final signed document.
- **Drafts:** Only drafts with substantive communications, review, or modifications should be saved. Drafts without substantive changes are considered transitory.
- **Email notifications from DocuSign:** Notifications that are automatically created and sent from DocuSign, such as notice that the document has been signed by another party, are considered transitory and may be deleted
- **Duplicate copies of the final, fully-signed document:** One official version of the executed contract should be downloaded by the record owner. Other King County signers may download a copy for their reference, but clearly identify it as a transitory copy. Other versions automatically sent to you for reference via email are considered transitory if you are not the owner of the document.

### Following applicable King County policies:

King County Policy [INF-14-3-EP, Using Electronic Signatures - King County](#) requires County employees to use the county's contracted Electronic Signature vendor, currently DocuSign, when documents require signature from external (outside the County) parties. While the policy allows for agencies to use discretion when selecting an electronic signature tool for internal only documents, the same records management principles outlined above are applicable. The Records Management Program recommends county offices utilizing an alternative tool to verify records can be accessed and managed according to King County Policy [INF-15-4-1-EP: Management of King County Public Records - King County](#) and these guidelines.

