







Records Management Guidance

Records Lifecycle Flowchart

Use this guide to determine what steps to take for **records in any format** that need to be cleaned up, disposed of, moved, or otherwise managed. The **first step** is to determine whether the records are **transitory or have retention value**.

<p>Transitory (duplicate copies, reference material, spam, personal records, etc.)</p>	<p>Delete/Destroy Transitory records can be destroyed without documentation. Electronic records can be deleted (also empty your Recycle Bin or Deleted Items folder). Physical records can be shredded or recycled.</p> 
<p>Retention Value. Records that are not transitory; i.e. everything else. All records with retention value will fill into one of three buckets: Active, Inactive, or Past Retention.</p>	




<p>Active (Still being used or accessed for the reason they were created. Have not yet met their Cutoff Date.)</p>	<p>Electronic/Digital Records</p>	<p>Physical/Paper Records</p>
	<p>Move to another shared space This could be SharePoint or Teams site; or other platform that is supported and approved by your IT department and properly backed-up.</p> <p>OR File to Content Manager Content Manager can be used to manage active electronic records. Leave the Cutoff Date blank when creating Digital Folders.</p> 	<p>Store onsite Ensure that records are safe, secure, and accessible. Best practice is to index active records using a tool like a spreadsheet or entering boxes in Content Manager.</p>  <p>OR Digitize Use an approved Disposition After Digitization (DAD) to scan records, retain the images for their retention period, and destroy the paper originals.</p> 







Records Management Guidance

Records Lifecycle Flowchart

	Electronic/Digital Records	Physical/Paper Records
<p>Inactive (Reached the Cutoff Date and are no longer used frequently. They are still within their retention period and cannot be disposed.)</p> 	<p>File to Content Manager </p> <p>Content Manager is designated by Executive Policy as the official repository for all inactive electronic records. It is also the only county system approved by the Washington State Auditor to store records created in a digital format.</p> <p>View the Filing Process Overview for the steps and options.</p>	<p>Send to the Records Center </p> <p>Inactive boxes must be entered in Content Manager. All records must meet Records Center requirements:</p> <ul style="list-style-type: none"> • at least one year left of retention period • one category per box • only approved box and labels • no binders, hanging file folders, or binder clips

<p>Past Retention (Have met the end of their retention period as defined on a retention schedule.)</p> 	<p>Disposition Request Form </p> <p>Fill out a form within Content Manager. If the records are not archival, you can delete or destroy them yourself after receiving approval by email. Physical records can also be picked up and destroyed by the Records Center.</p> <p>If the records are archival or potentially archival and in an electronic format, you should instead file the records to Content Manager.</p> <p>Review Disposition of Records for more details.</p>
---	--





Records Management Guidance

Records Lifecycle Flowchart

Retention Schedules

The best tool to determine where records fall in the flowchart on the previous pages is the [retention schedule](#). Locate the retention schedule corresponding to your Department-Division-Section; which is also the list of the categories you have access to in Content Manager. The appropriate retention category is always based on the **content and function** of the record. If you do not have access to the correct category in Content Manager, do **not** choose a different one. Instead, reach out to your [Records Management Lead](#) or contact records.management@kingcounty.gov to have the appropriate category added.

Use the info in the **Title and Description** field to determine which **Category** the records belong in.

Use the **Retention Period** field to determine when a record can be **disposed of** (i.e. the length of time *after* meeting the Cutoff Date).

Owner (Organization)	Category Title and Description	Cutoff	Retention Period	Additional Retention Details	Archival Designation	Essential?	Disposition Authority Number (DAN)	State Series Title
DES-RALS- (ARMMS) Archives, Records Management and Mail Services	CONTRACTS, AGREEMENTS AND WARRANTIES - Various contracts and agreements signed by ARMMS and one or more parties that set out terms and conditions to which the signing parties agree or submit. Examples include: Lease agreements with Fleet Services for Records Center and Mail Services vehicles; Contracts with Content Manager vendor for system support and products; Mail Services equipment and postage suppliers, etc. Specific records may include the signed instrument, change orders, and administrative records needed to document the signatories' compliance with the terms of the contract.	Termination or expiration of contract/agreement and completion of contract requirements	6 years		Not Archival	Yes	GS50-01-11R5	Contracts And Agreements - General

Use the **Cutoff** field to determine when a record becomes **inactive** (this triggers the start of the retention period).

Use the **Archival Designation** column to determine whether a record can be destroyed, or will need to be transferred to King County Archives for appraisal

$$\text{Cutoff Date} + \text{Retention Period} = \text{Disposal Date}$$

Hint: you can use a tool like a [Date Calculator](#) (external link) to ensure you are calculating the correct disposition date. It can also be helpful to create a simple inventory/spreadsheet to be certain you are calculating dates correctly and taking appropriate actions ([here](#) is a basic example of what that *could* look like). You can also review a [glossary](#) of records management terms.

