













Records Management Guidance

Physical Records Management Overview

First, determine whether the records are transitory or have retention value.

Transitory (duplicate copies, blank forms, printed reference material, etc.)		Recycle Transitory records can be destroyed without documentation.	
Retention Value (official records that are not transitory)		See table below...	

Then, for everything that is *not* transitory, refer to the table below.

Active (Still being used or accessed for the reason they were created. Have not yet met their cutoff date.)		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 .		OR	Digitize Use an approved Disposition After Digitization application to scan records, retain the images for their retention period, and destroy the paper originals.	
Inactive (Have met their cutoff date and are no longer used or accessed frequently. They are still within their retention period and cannot be disposed.)		Send to the Records Center Inactive boxes must be entered in Content Manager. All records must meet Records Center requirements .			<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 	
Past Retention (Have met their retention period as defined on a retention schedule.)		Disposition Request Form Fill out a form in Content Manager .			If the records are not archival, you can either destroy them yourself, or the Records Center can pick them up and destroy them for you. If they have archival value, the Records Center will pick them up for transfer to the Archives.	



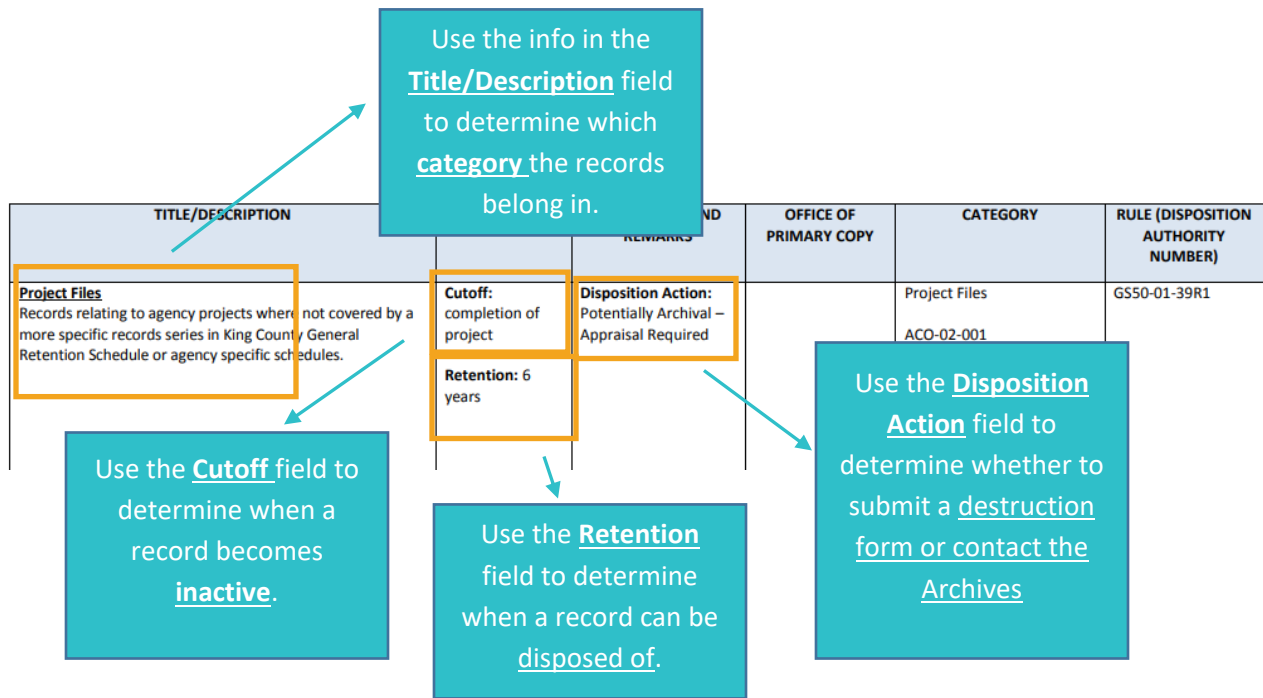


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Retention Schedules

The best tool for helping to determine where records fall in the table on the previous page, refer to the [appropriate retention schedule](#).



Other Resources

[Records Management Leads](#) – for records management questions specific to your agency and business needs

[Sample High-Level Inventory Form](#) – optional spreadsheet you can use to provide a high-level overview of the types of records and what to do with them

[Sample Box-Level Inventory Form](#) – optional spreadsheet you can use/customize to inventory/index boxes

[Sample Records Clean-up Checklist](#) – optional checklist of resources and reminders

[Records Center Box Packing Guide](#) – instructions on how to pack boxes for storage at the Records Center

