
Developing Records Retention Schedules: Checklist for Evaluating New/Updated Records Series

Purpose: A checklist to help state agencies when writing new/updated records series for their records retention schedules.

Is it clear (to a reasonable person outside of the agency):

What these records actually are (including examples, if appropriate)?

Who is doing what to whom (e.g., is the agency giving a license or getting a license)?

Why these records are not already covered by another records series?

When this series should be used instead of another series (such as appropriate “excludes” language, etc.)?

That all process outcomes (such as approval, denial, withdrawal, etc.) are covered by this series or by other series?

What the rationale is for the retention period (including cutoff)?

That the retention cutoff works for all process outcomes (such as approval, denial, withdrawal, etc.)?

That the Archival designation is based on an appraisal by Washington State Archives AND is consistent with Washington State Archives’ *Policy Statement on Archival Appraisal*?

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

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