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## Developing Records Retention Schedules: How to Complete the Summary of Changes

**Purpose: Provide guidance to state agencies on how to complete the Summary of Changes as part of submitting updates to their agency's records retention schedule.**

The Summary of Changes is intended to assist both the Archives and the State Records Committee as they review your proposed schedule changes. It is not meant to log all the details about each change. Agencies can retain their own detailed documentation if that is helpful.

When completing the Summary of Changes:

- **Use the template** provided on the Archives' website as the guide for what needs to be included and how it should be laid out.
- **Keep all the sections** listed in the template. If your schedule changes do not include a particular type of change (such as no new records series), keep the section heading with a single bullet point:
  - None
- **Except when no series are being revoked** – If there are no “Archival” nor “Non-Archival” series being revoked, these two sections can be combined as:

### **Series Being Revoked**

- None
- **List Series under All Applicable Sections** – If there are more than one type change happening (such as changes to both the retention and the description), the records series needs to be listed in each section.
- **Adding a Rationale** – If the change is likely to raise questions, particularly if it involves a large retention change or change to the “Archival” designation, it is helpful to add an additional line beneath that change:

*Rationale: [Very brief explanation about why the change is needed].*

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

**[www.sos.wa.gov/archives](http://www.sos.wa.gov/archives)  
[recordsmanagement@sos.wa.gov](mailto:recordsmanagement@sos.wa.gov)**