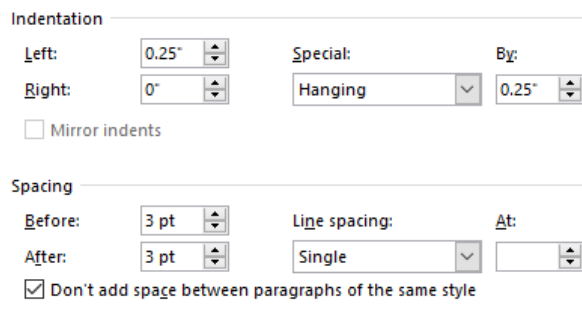


Developing Records Retention Schedules: How to Format Records Series Titles and Descriptions

Purpose: Provide guidance to state agencies on the formatting style to use when writing records series titles and descriptions in records retention schedules.

Here are the basic formatting style guidelines to use so that records retention schedules continue to be of a consistently high standard of appearance and readability:

- Follow the formatting set out in the *Agency Records Retention Schedule Template* and the *State Government General Records Retention Schedule* as your basic guide;
- The general format is **Calibri font 11 point** with a **3 point** paragraph spacing **before** and **after** with the “Don’t add space between paragraphs of the same style” **unchecked** (except where noted below);
- **Titles** are to be **Calibri font 11 point, bold and italics**, with a **3 point** paragraph spacing **before** and **after**;
- **Descriptions** are to be **Calibri font 11 point** with a **3 point** paragraph spacing **before** and **after**;
- **Bulleted Lists** (in includes and excludes statements) are to have:



The screenshot shows the Paragraph settings in Microsoft Word. Under the Indentation section, the Left margin is set to 0.25", the Right margin is 0", and the Special margin is set to Hanging with a By value of 0.25". The Mirror indents checkbox is unchecked. Under the Spacing section, the Before and After paragraph spacing are both set to 3 pt, and the Line spacing is set to Single. The checkbox for "Don't add space between paragraphs of the same style" is checked.

In bulleted lists:

- Capitalize the first word in each item;
- Use semi-colons (“;”) at the end of each item;
- With a period at the end of the last item in the list.

- **Notes** are to be **Calibri font 10.5 point, italics**, with a **3 point** paragraph spacing **before** and **after**;
- **Subject Indexing Codes** (only visible when using the Show/Hide button ¶) are to be **Calibri font 11 point** and be at the end of the first paragraph of the description before any “Includes” statement;
- Use long dashes “–” as separators rather than hyphens “-” (except for hyphenated words);
- Use an Oxford comma before the “and” in lists of three or more items (e.g., A, B, C, and D);
- Use a single space after a period at the end of sentences (instead of two spaces);
- When referring to other records series (such as in an excludes statement), **italicize** the **title** and the **DAN** in parentheses like this: *Financial Transactions – General (DAN GS 01001)*;
- Do not include any blank lines in the records series title and description.

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