

Using Records Retention Schedules: How to Navigate Records Retention Schedules

Purpose: Provide guidance to state agencies and local government entities on the different ways of locating information in records retention schedules.

1. Review the Table of Contents

The beginning of each records retention schedule contains a table of contents listing the functional records groups that make up each section of that schedule. Categorizing records by the overall purpose they serve for an agency can help users place their records within the schedule, regardless of differing agency terms for the records they create.

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2. Review the Indexes to Archival Records, Essential Records, and Disposition Authority Numbers (DANs)

Users can find lists of all the archival records, essential records, and DANs a schedule contains in the corresponding indexes in the back of the schedule.

3. Review the Subject Index

Each schedule contains a subject index in the back to assist users in refining their search. A subject index will either list the page of the corresponding records series, or direct the reader to the correct records schedule for that type of record.

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4. Use a keyword search

In the electronic versions of schedules, readers can use the keyboard shortcuts CTRL-F (Windows) or Command-F (Mac) to do a keyword search of the document. This method can be useful for searching for unique keywords. *However*, the State Archives cautions beginners from relying solely on this search method because:

- It can return an overwhelming number of results;
- The keyword could turn up in an unrelated records series;
- The keyword could be absent from the schedule, but there could still be an applicable records series that uses different terms.

Users should familiarize themselves with the functional categories a schedule is divided into and consult the schedule indexes before assigning records series to their records.

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

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