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## Using Records Retention Schedules: Strategies for Applying Retention Schedule Updates

**Purpose: Provide guidance to state agencies and local government entities on how to ensure that their records destruction/transfer follows current retention requirements.**

Destruction or transfer of public records needs to follow the records retention requirements in effect at the time that the agency is destroying/transferring the records. Before getting rid of the records, agencies need to update their existing retention information (such as DANs, retention periods, future destruction dates, etc.) to reflect current records retention schedules.

Here are two approaches to updating retention information:

### 1. Update Now – As soon as a records retention schedule has been revised

Using the “Summary of Changes” that accompanies each retention schedule revision as a guide, go through the agency’s existing records retention information and update as necessary.

**PROS:** Keeps agency retention information consistently up-to-date.

Takes advantage of reduced requirements when retention periods are shortened.  
Lowers risk of destroying records too soon when retention periods are increased.

**CONS:** Requires initial work upfront each time a retention schedule is revised.

### 2. Update Later – As records become eligible for destruction/transfer under retention requirements applied earlier

When agency records become eligible for destruction/transfer based on the originally applied retention information, check whether the retention requirement has changed.

**PROS:** Reduces work upfront each time a retention schedule is updated.

**CONS:** Increases risk of destroying/transferring records prematurely if retention requirements have increased.

Increases risk of retaining records longer than necessary if retention periods have been reduced.

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