

## **EXAMPLES OF RETENTION SCHEDULES**

### **FORMS FILES**

A clean copy of each form created by an agency with related instructions and documentation showing inception, scope, and purpose of the form.

#### **RETENTION**

Record copy: Retain for 1 month after form is discontinued, superseded or canceled and then destroy.

Duplicate copies: Retain until form is discontinued and then destroy.

#### **SUGGESTED PRIMARY CLASSIFICATION**

Public.

### **POLICIES AND PROCEDURES MANUALS**

Policies and procedures that govern the operation and administration of various programs within the organization.

#### **RETENTION**

Record copy: Permanent. Retain by agency until superseded and then transfer to State Archives with authority to weed.

Duplicate copies: Retain by agency until superseded and then destroy.

#### **SUGGESTED PRIMARY CLASSIFICATION**

Public.

### **TRANSITORY CORRESPONDENCE**

Business-related correspondence that is routine or transitory in nature and does not offer unique information about agency functions or programs. These records include acknowledgment files and most day-to-day office and housekeeping correspondence. These records may originate on paper, electronic mail, or other media. This correspondence filed separately from program and project case files.

#### **RETENTION**

Record copy: Retain by agency until administrative need ends and then destroy.

Duplicate copies: Retain by agency until administrative need ends and then destroy.

#### **SUGGESTED PRIMARY CLASSIFICATION**

Protected: UCA 63-2-304 (21) (1992).

### **WORD PROCESSING FILES**

Documents such as letters, messages, memoranda, reports, handbooks, directives, and manuals recorded on electronic media such as hard disks or floppy diskettes and used to produce a hard copy which is then maintained in organized files.

#### **RETENTION**

Record copy: Retain by agency until hard copy is filed and administrative need ends and then delete.

Duplicate copies: Retain until administrative need ends and then delete.

#### **SUGGESTED PRIMARY CLASSIFICATION**

Public.

