

Phase 1 At-a-Glance: Records Cleanup

What You're Doing: Disposing of old records that don't need to be kept anymore according to Records Retention Schedules (ROT = Redundant, Outdated, Trivial).

Quick Decision Guide

- Is it obviously ROT? → Dispose immediately
- Am I unsure? → Flag with sticky note, move on
- Might be historical/legal/personnel? → Ask Archives

Good pace: 2-3 boxes per hour. Slower = too cautious. Faster = double-check you're not missing important records.

What You'll Need

- Retention Schedules: archseattle.org/for-parishes/parish-archives-and-records-management
- Sticky notes for "Review Later" boxes
- Shred bins and recycle containers
- Records Destruction Form
- Archives contact info for questions

Understanding Retention Schedules

- How to read them:

- Each schedule shows a trigger (when to start counting) and length (how long to keep)
- **Example:** Vendor invoices = FY+6. If your fiscal year ends June 30, 2026 keep those invoices until June 30, 2032, then destroy.

- How to apply them:

- Apply retention rules to whole boxes, not individual folders or documents.
- If a box has mixed records, use the longest retention period
- Use the newest date in the box and apply the retention period to the entire box

Dispose of Transitory Materials Immediately (No Schedule Check Needed)

- Office Administration

- Draft documents (keep only final versions)
- Old meeting invites, reminders, and schedules
- Extra copies saved for convenience

- Communications

- Personal communications
- Expired reservations and confirmations

- Reference Materials

- Outside organization flyers/brochures
- Temporary forms already entered into databases
- Duplicate electronic and paper copies of the same thing

Tips for Success

- ✓ Check schedules for unfamiliar record types
- ✓ Document destruction
- ✓ Keep one complete set, discard duplicates
- ✓ Don't get stuck on one difficult box. Flag it and come back later
- ✓ When in doubt, email Archives staff