



South Dakota State Archives Records Training: The Basics

Part 3: Using your records retention and destruction schedule

Welcome to the South Dakota State Archives' basic records training series, Part 3:
Using your records retention and destruction schedule.



▼ How long do I keep the records I create?

The answer is in your agency's records retention and destruction schedule!



Last part we discussed the benefits of good records management and the importance of destroying records responsibly. But different records need to be kept for different lengths of time – so how do you know how long to keep the records you create? The answers are in your agency's records retention and destruction schedule!

RECORDS MANAGEMENT
DANA HOFFER, MANAGER

RETENTION & DESTRUCTION SCHEDULES

SDCL 1-27-13 and 1-27-14 require that each agency develop record retention and destruction schedules. Agencies, institutions, and regional offices can obtain assistance with records inventory, appraisal, and schedule drafting by writing, calling Records Management at 605-773-3589, or emailing [BOA-RecMgt Front Desk](#).

An agency Records Officer may request a working copy of their records retention and destruction schedule(s) when retention schedule changes need to be made. Contact Records Management for additional information regarding this process.

Download the Records Management Retention Schedule Change Request Form:

- > [Retention Schedule Change Request Form](#)
- > [Instruction Guide](#)

Following the preparation of an office's records retention and destruction schedule, the State Records Manager will serve as the agency's liaison with the State Records Destruction Board in obtaining authorization for proposed records retention and destruction. Additional information on this process can be found in [ARSD 10:03:01](#).

[State Agencies Records Retention Manuals](#)
[Political Subdivisions Records Retention Manuals](#)

Records Management Contact Information:

104 S. Garfield, Building E.
Hwy 14-83 East Truck Bypass
Pierre, SD 57501
ph 605-773-3589
fax 605-773-5955

Retention & Destruction Schedules
Records Storage
Archive Writer & Scanning Services
Records Officers

Find your agency's retention and destruction schedule online

<https://boa.sd.gov/central-services/records-management-schedules.aspx>



The retention and destruction schedules for all State and Local Government Agencies are available online through the Bureau of Administration's Records Management Office. Simply go to the URL on your screen, click the link to go to the State Government manuals, then find your department in the list. You can download the PDF and save it for easy reference.

STATE OF SOUTH DAKOTA
RECORDS RETENTION &
DESTRUCTION SCHEDULE
AUTHORIZATION FORM
(Std Form RM-1 Rev 1/03)

DEPARTMENT: Game, Fish and Parks
DIVISION: Administration
OFFICE: Administration
PROGRAM: Finance
RECORDS OFFICER: Chris Petersen
RM CUSTOMER #: 0340

RECORD R.D.B.
SERIES NO. TITLE—DESCRIPTION—RETENTION AND DESTRUCTION SCHEDULE AUTHORITY
NUMBER

GFP-20. **PROJECT FILES:**

07-060

This series is arranged numerically and documents the management and fiscal analysis of the fiscal office of on-going programs in progress in each division. Information may include: financial and federal aid project information, state park revenues, fleet analysis, economy efficiency effectiveness studies, cash flow analysis, and fund analysis. This record series is used for financial management of division projects and for reference purposes.

RETENTION: Retain current in office. Transfer closed to storage for 4 years. Destroy 4 years after project is closed provided all litigation, claims, and audit findings involving the records have been resolved and final action has been taken.

(Note: Previous record series number was GFP-28.)

Making sense of the schedule

Look for the section that applies to your office or program



Your department's retention schedule will have many pages. Find your office or program in the table of contents and go directly to that section. The upper right hand corner of each page will have the Department, Division, Office and Program responsible for creating and managing the records listed. It will also give the name of the department's records officer. You can contact them if you have questions.

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RECORD SERIES NO.	TITLE--DESCRIPTION--RETENTION AND DESTRUCTION SCHEDULE	R.D.B. AUTHORITY NUMBER
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GFP-24	<u>PROJECT FILES:</u>	
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Making sense of the schedule

Find the appropriate record series title for your records



Once you arrive at the correct section, you can search through the list for the appropriate record series title for your records. These titles appear underlined and in all capital letters as seen here.

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Making sense of the schedule

If you aren't sure of the record series title, read the paragraph descriptions and find the best fit



Each record series includes a paragraph description which discusses the information contained in the record, the purpose of the record, and how the records are filed or maintained. You can use these descriptions to determine the record series that best fits the records you create.

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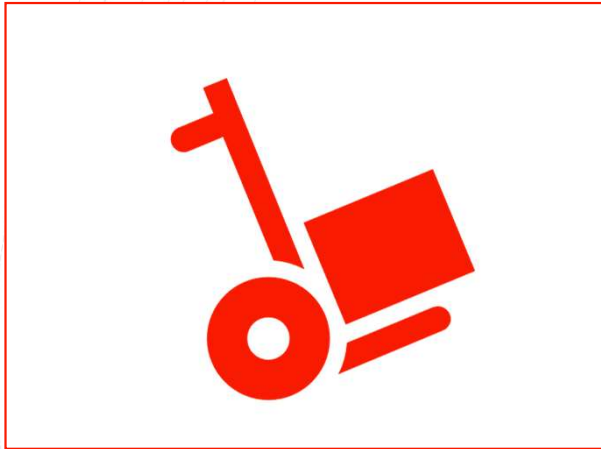
Making sense of the schedule

The "RETENTION" section tells you where, in what format, and how long to keep a record.



The retention period for the series is listed at the end of the entry. It will tell you where, in what format, and how long to keep a record.

Records should be sent to the State Archives if the retention is:



"Transfer to the State Archives for final disposition"

or

"Subject to archival screening"

If there are records that have historical value and should be transferred but are not identified in the schedule, please let the Archives know!



If the retention says "Transfer to the State Archives for final disposition" or "Subject to archival screening," those records should be transferred to the State Archives. These record series have been identified by the State Archivist as having permanent historical value. If your agency creates other record series that you believe have permanent value but are not identified in the retention schedule, please let the Archives know!

- Does the schedule accurately reflect the records your agency is creating and managing?
- Are there series you no longer create?
- Are some record series being maintained digitally instead of microfilmed?

Review the retention schedule regularly!



The retention manual should be reviewed regularly and updated. Key questions to ask are:

Does the schedule accurately reflect the records your agency is creating and managing?

Are there series you no longer create? Alternatively, are you creating new records to comply with a new function or mandate?

Are some record series being maintained in different formats? For example, are you storing records digitally instead of on microfilm?

Submit any changes to Records Management

Must be submitted by your agency's records officer

Forms available on the Records Management website

Changes must be approved by the State Records Destruction Board

If so, talk with your agency's records officer. They can submit retention schedule changes to the Records Management Office. These changes must be approved by the State Records Destruction Board before they can go into effect. Meetings of the Destruction Board happen twice a year and are open to the public.

Have questions?
Contact:

Sara Casper
Government Records Archivist
South Dakota State Archives
(605) 773-3780

Sara.Casper@state.sd.us

Or

Dana Hoffer
Manager
South Dakota Records Management
(605) 773-3589

Dana.Hoffer@state.sd.us

Music - "Corporate Motivation" by AShamaluevMusic



Thank you for joining part three of our series. If you have questions, please contact Sara Casper at the State Archives, or Dana Hoffer with the State Records Management Office.