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STATE OF IDAHO RECORDS MANUAL

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INTRODUCTION

The Idaho State Historical Society (ISHS) has a statutory mandate to provide statewide records management services and “provide to all state agencies a records management manual” per Section 67-4131 of Idaho Code. The Executive Director has assigned this responsibility to the Idaho State Archives as part of the 2013 merger of the State Record Center under the Idaho State Archives. Previous versions of this manual were created under the Idaho Department of Administration.

PURPOSE

Public records are essential to government. A robust records management program protects citizens, documents legal decisions, promotes government transparency and captures Idaho history.

Every government employee creates public records and has a responsibility to manage them. Without a specific set of standards founded in best practices, an agency’s records management practices can quickly derail and set up an employee for failure in their responsibility to properly handle public information. Poor records management can impede business operations, contribute to wasted funds and lead to legal implications.

This manual serves to:

- Provide a responsible and reasonable approach for state agencies to implement records management responsibilities;
- Establish uniformity through standards that are relevant, reliable and innovative to promote best practices in records management and preserve Idaho history through archival services;
- Promote coordination and collaboration of statewide records manager partners among all areas of state government; and
- Assist agencies to save space, money and time with successful records management programs.

Records management is common to state government but unique in its challenges. It would be impossible for the Idaho State Archives to recommend a single solution. This manual was created with primarily state government operations in mind, but these best practices could also be applicable in other government settings. Each scenario should be assessed with best practices of records management and archival principles in mind to ensure the best interest of the record – and its value to the agency – is upheld.

CHAPTER 1

RESPONSIBLE AND TRANSPARENT RECORDS MANAGEMENT

STATUTE DEFINES A PUBLIC RECORD

A public record, as defined in Idaho Code §74-101, “includes, but is not limited to, any writing containing information relating to the conduct or administration of the public’s business prepared, owned, used or retained by any state agency, independent public body corporate and politic or local agency regardless of physical form or characteristics.”

RECORDS ARE PUBLIC PROPERTY

Public records of the State of Idaho are the property of the citizens of the state in perpetuity per Idaho Code §74-121. Outgoing officials and employees must pass such records on to their successors. Government employees should protect and preserve public records to avoid improper or unlawful transfer, destruction or removal from their proper custodian.

RESPONSIBLE RECORDS MANAGEMENT

OBJECTIVES OF A RECORDS MANAGEMENT PROGRAM:

- Implement standardized records management procedures and concepts within an agency
- Promote government transparency with simple access to information
- Safeguard vital records
- Preserve records with historic value
- Transfer inactive records to lower cost storage areas
- Defensibly destroy records that have served their purpose

BENEFITS OF A RECORDS MANAGEMENT PROGRAM:

- Deliver efficient and consistent business operations
- Minimize cost
- Fulfill responsibilities as a public servant
- Provide valuable information to future advancements of an agency
- Identify and transfer permanently valuable records to the Idaho State Archives

Records management in a government office is no longer limited to paper records in three-drawer filing cabinets at the end of the hall. Simply put, the amount of information and number of records being produced – in numerous formats with emerging technologies – creates incredibly more complex challenges for the records management profession today. That being said, there are still best practices in the foundational concepts of records management that can be applied at all state agencies in their pursuit of a robust records management program.

CHAPTER 2

THE VALUE OF A RECORDS MANAGEMENT PROGRAM

Records are indispensable in the efficient and economical operation of state government. They serve as the memory and are evidence of past events, as well as the basis for future actions. When created, maintained and disposed of in a systematic and orderly fashion, records management is a tremendous asset. If records are created, maintained and disposed of in a haphazard and disorderly manner, they reduce the effectiveness of an organization and substantially increase costs.

PROGRAM DELIVERABLES:

- To Save Space
 - By removal of inactive records from costly office space
 - By removal of records no longer of value from storage space
 - By a systematic flow of records from office to storage to final disposition
- To Save Money
 - By providing low-cost storage for inactive records
 - By controlling and reducing the purchase of additional equipment
- To Save Time
 - By reducing the volume of records that are filed and refiled
 - By instituting systems where each agency knows what records it has and where they are stored
 - By providing an orderly, efficient manner for storing and retrieving inactive records

A records management program should implement agency-specific policies and procedures for managing records according to applicable laws, records management best practices and archival concepts, including:

- Compliance with public disclosure requirements;
- Effective practices to ensure records integrity and accessibility;
- Transfer of historically valuable records to the Idaho State Archives;
- Removal of non-current records from active office storage to low-cost storage areas;
- Protection and security backup of records essential to agency authority and operations;
- Disaster preparedness; and
- Systematic identification and disposal of records which have reached the end of the retention period specified in a retention schedule.

CHAPTER 3

THE ROLES OF AGENCY RESPONSIBILITY AND STATEWIDE RECORDS MANAGEMENT SERVICES

RECORDS MANAGEMENT SERVICES FOR STATE AGENCIES

The Government Records Program at the Idaho State Archives fulfills its statutory obligation to provide statewide records management and archival services through these essential services:

- Preserve a large and unique collection of historic records, including photographs, books, maps, manuscripts, oral histories and government records;
- Operate a State Record Center to provide centralized records management storage services for primarily state agencies;
- Develop professional opportunities (such as statewide records manager meetings) to promote coordination and collaboration of statewide records manager partners.
- Create technical documents and promote shared resources for agency partners, such as the *General Records Retention Schedule* and hosting a compilation of agency-specific retentions schedules; and
- Promote cost savings and streamline responsible government by elevating the standard practices of government employees' records management and archival responsibilities.

AGENCY RESPONSIBILITIES OF RECORDS MANAGEMENT

Agencies should provide efficient, economical and effective controls over the creation, distribution, organization, maintenance, use and dispositions of records through a comprehensive system of integrated procedures for the management of records. A person assigned to administer a Records Management Program who will coordinate records management operations and direct and control the disposition of public records in accordance with laws and established procedures is often called a records manager or records officer. Record coordinators can be assigned, as necessary, throughout the agency to support the program efforts prioritized by a records officer.

AGENCY LEADERSHIP

All state agencies are responsible for the implementation of a robust records management program, and it is important to note that all employees have a responsibility to properly manage public records.

AGENCY RECORDS MANAGEMENT RESPONSIBILITIES

- Develop, disseminate and coordinate policies and procedures related to records management concepts specific to agency operations
- Inventory, organize, classify and establish retention periods for all records
- Promote records management best practices and provide records management training
- Establish and monitor compliance with professional standards for storage, equipment and technology resources throughout the agency
- Create standards for efficient and transparent access to information through public records law, including a reliable fee schedule and process for public information requests
- Develop agency-wide standards for: a forms design and control system; micrographics controls and procedures, electronic records management policies and procedures, etc.
- Train other personnel in the fundamentals of records management and their role in the records management program
- Implement destruction and transfers that are required by an agency-specific records retention schedule
- Identify vital records and develop a disaster plan to ensure maximum availability of records for re-establishing operations quickly with minimum disruption and expense
- Work with the Idaho State Archives to ensure historic records are preserved

SUPPORTING RECORDS MANAGEMENT EFFORTS

When employees handle public records they should ensure that:

- Records are accessible for public inspection and their security is maintained
- All information systems preserve the integrity and accessibility of public records for the duration of the established retention period
- Only active records are stored in valuable office space and inactive records are shifted to low-cost records center storage on a regular basis
- Records essential to agency authority and operations are adequately protected from damage or loss
- Records are destroyed at the end of the retention period specified on the approved retention schedule
- Ensure agency-specific policies and procedures are properly executed in the day-to-day operations of their work area

CHAPTER 4

STATUTE AND OTHER RESOURCES

STATUTORY OBLIGATIONS OF RECORDS MANAGEMENT

The legal requirements of records management can be found throughout Idaho Code, administrative rule and agency-specific policy and procedure. This is not an exhaustive list, but here is a select list of notable statutes that affect records management:

- Idaho Code §67-4126: The Idaho State Historical Society (ISHS) is responsible for records management services for state government and to require historic records to transfer to the agency.
- Idaho Code §67-4129C: Creates the “records management services fund” to receive funds from state and local government agencies for records management services.
- Idaho Code §67-4131: ISHS may develop rules and procedures pertaining to records management services.
- Idaho Code §31-871: Identifies the classification and retention of county records.
- Idaho Code §31-871A: A county official may reproduce and retain documents in a photographic, digital or other non-paper medium and associated requirements.
- Idaho Code §50-907: Identifies the classification and retention of municipal records.
- Idaho Code §50-908: The city clerk shall serve as the municipal records manager and supervise the administration of associated requirements.
- Idaho Code Title 74, Chapter 1: Idaho Public Records Act.

RESOURCES BEYOND THIS MANUAL

This intention of this manual is to enhance records management programs within state agencies. Here are additional relevant resources:

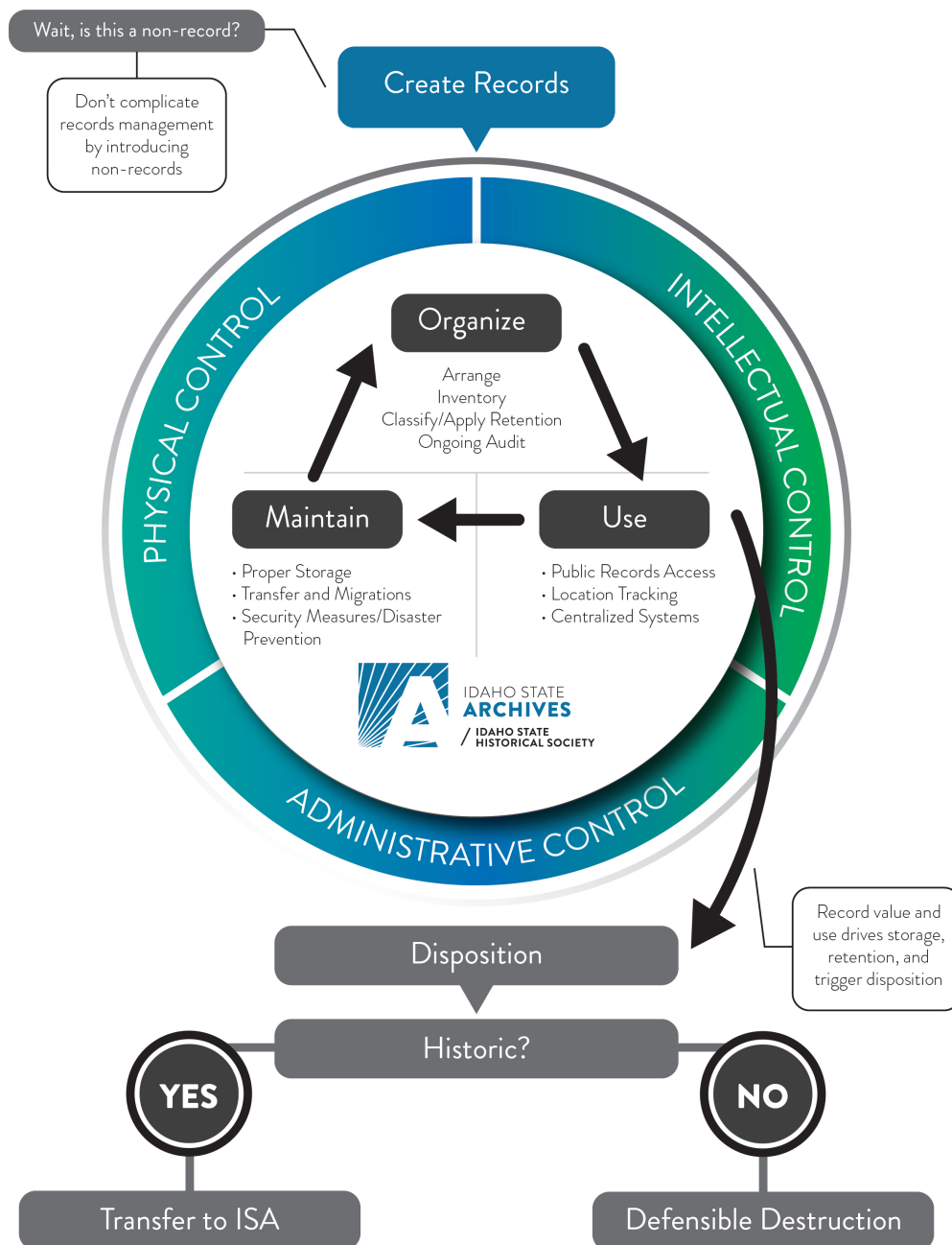
- Office of the Attorney General’s *Idaho Public Records Law Manual*, a manual illustrating how Idaho’s Public Records Law establishes a basic set of ground rules securing the public’s access to government records, while preserving an individuals’ right to privacy.
- The State of Idaho’s *General Records Retention Schedule*, a guideline of recommendations related to the retention periods for common record types found throughout state government.
- The ISHS *Government Records Policy*, a document to outline the criteria and process for historic records to transfer to the Idaho State Archives.
- The ISHS *Versatile Web User Manual*, a user manual to assist state agencies with the inventory tracking database used by the State Record Center and Idaho State Archives.
- *A Public Records Manual for City Officials*, a manual developed by the Association of Idaho Cities to assist city employees in records management responsibilities.
- *IAC Records Retention Manual*, a manual created by the Idaho Association of Counties to assist county officials in the management, retention and disposition of county records.

CHAPTER 5

RECORDS MANAGEMENT PROGRAM TOOLS

LIFE CYCLE OF A RECORD

Records management commonly refers to the life cycle of a record. There are distinct phases from creation to final disposition. Through the record life cycle, there are various records management strategies to implement in a robust records management program.



AN ABBREVIATED ROADMAP TO A RECORD LIFE CYCLE:

Uniting physical, intellectual and administrative control into a single records management program is essential for a records management program to be successful. Here is a roadmap to establish minimum requirements of a records management program:

1. Conduct an initial records inventory assessment (see page 12)
2. Define the classification of records (see page 13)
3. Establish a files management system (see page 13)
4. Determine standards of proper storage environment (see page 11)
5. Ensure long-term security measures and risk reduction for disaster preparedness (see page 11)
6. Create files maintenance and migrations procedures (see page 10)
7. Identify consistent practices for transparent access to public records (see page 10)
8. Develop ongoing audits and control procedures (see page 14)
9. Create standards to streamline the life cycle of a record to ensure historic records are transferred to the state archives and non-permanent records are properly destroyed (see page 15)

NON-RECORDS

Avoid confusion in a records management program by eliminating non-records from the scope of work. Here are a few examples:

- Stocks of publications and empty forms
- As a public employee, don't mix personal business and emails with public records
- Copies of documents already available in multiple locations
- Computer programs and database systems

ADMINISTRATIVE CONTROL

Idaho Code §74-119 states, "every state agency or independent public body corporate and politic shall adopt guidelines that identify the general subject matter of all public records kept or maintained by the state agency or independent public body corporate and politic, the custodian or custodians, and the physical location of such documents."

DEVELOP POLICIES AND PROCEDURES

Agencies should develop internal policies to create consistency in the day-to-day operations of records management within the agency. Such policies should:

- Assign defined roles and responsibilities to implement a robust records management program
- Establish a reliable approach to ensure records are created, used, stored and managed in a way to ensure the information is trustworthy and made easily available to staff and the public
- Protect confidential information from creation through the entire life cycle of the record until final disposition
- Establish a plan for migrations, backups and long-term storage solutions
- Create an organizational scheme and inventory system to easily identify, locate and retrieve information
- Establish a chain of custody system for original records that change hands throughout the organization
- Audit record holdings to confirm compliance
- Identify a method to maintain, backup and convert records to mitigate the loss of information
- Implement systematic and defensible destruction procedures for records that have satisfied retention requirements established by the agency's retention schedule
- Establish consistent and reliable systems to carryout public records law responsibilities
- Adopt preventative approaches to emergency preparedness, such as water checks, pest inspections and off-site backups
- Comply with applicable laws
- Build in a review process to update policies and procedures to keep up with current best practices of a records management program

RECORD FORMATS AND POTENTIAL COPIES

Best practice dictates that original records should be preserved in their original format for the length

of time identified in an agency retention schedule. It is an administrative decision to determine the format of an original record. Sometimes, the decision is mandated by law; other times, it should be determined by best practices and operational needs. Stable and reliable methods of records formats should be applied to government records. It may come with a cost, but an agency cannot meet its business needs and statutory obligations without investing in a records management program.

While generally duplicate records should be avoided, there may be times when there is value in creating a duplicate record to the original. A digital scan, online access copy or microfilmed duplicate may be a good option in these examples:

- High-volume and repeated access can cause detriment to the original
- Multiple users require access to the record at the same time
- An off-site backup of the record for protection
- Advanced search techniques (such as keyword search) to find information
- The item is used for display or exhibit
- The record was created in a proprietary way that could obstruct future and long-term access

Microfilm technology continues to be a durable medium to store permanent records. It is stable technology that provides reliable long-term preservation. Due to the long-standing nature of the medium, there are many resources available for appropriate standards, such as the American National Standards Institute (ANSI). Microfilming continues to be a cost-effective and space-saving approach to maintenance, retrieval, security and preservation of records.

Electronic records management, on the other hand, is an emerging profession with rapidly changing technology. Best practices and solutions are still being created and implemented. (Remember when streaming music replaced mp3 players that replaced CD players that replaced your pocket Walkman. Walkmans hit the shelf in 1979; that is quite a bit of change over the course of a public employee's tenure.) Therefore, records management policies and procedures should be implemented in a media-neutral approach. Digital reference copies are not intended to replace the original record or serve as a long-term digital solution. It is important to keep in mind that all records mediums become obsolete; it is the rate of change that varies by media type.

Each approach to determining a record format should be strategically approached with best practices in mind. Consider the complexity of these several examples:

- An agency may create a microfilm backup of digital-born records because it is a reliable, cost effective and space-saving approach to ensure permanent records are made available in perpetuity. The original is organized and maintained digitally at the agency, and the State Record Center provides cost-effective, off-site storage of the backup microfilm.
- An agency may decide to digitize an access copy of original paper records to make them easier to search in an online database. The original is permanent and historic, so it transfers to the Idaho State Archives while the agency maintains the online search tool.
- An inactive, non-permanent record that was originally created in paper may be piling up in someone's office when off-site storage is more suitable at the State Record Center.
- A digital record, created 20 years ago, is still under retention and currently being stored on a fragile media type – such as a floppy disk, DVD or thumb drive; it should be migrated to a more stable environment (paper or secure server) until final disposition.

PHYSICAL CONTROL

Physical control of public records is key to records management. These concepts ensure that information is stored where descriptions indicate and that records are stored in an environment that reduces the risk of loss or damage.

Records storage – in an office, on a server, in a cloud or in a warehouse – is a business cost. Robust records management services create a systematic approach to ensure business and legal needs are met while maximizing public funds to ensure that records are stored in the appropriate environment. The lack of proper physical control can lead to loss or destroyed information, which can cause an agency to incur unnecessary cost.

Frequency of access should be considered when defining proper storage environments:

- Active records that are commonly accessed to conduct daily operations should be readily accessible to appropriate staff.
- Inactive records should be shifted to low-cost storage areas, such as the State Record Center.
- Records that have satisfied their retention requirement and no longer contribute to the fiscal, administrative and legal use of an agency should be properly destroyed.
- Preservation should be considered at all points in the life cycle of historic records. When the operational need of a historic record is less frequent, agencies should contact the Idaho State Archives.

ORGANIZING RECORDS

Agencies are encouraged to teach employees how to organize and store records:

- Organized records are easier to find
- Sort records by type
- Don't mix records with different retention schedules
- Avoid duplicate records
- Keep track of files if they move
- Centralize the filing of common interest records to one location
- Remove inactive files from high-use areas
- Keep confidential information secure

ENVIRONMENTAL CONSIDERATIONS

Create an environment to protect records – in any media format – from common storage risks:

- Excessive temperatures, smoke and water exposure can wreak havoc on records in all media formats. In addition to paper records, keep records away from extreme temperatures and moisture to avoid warped magnetic media and destroyed servers, computers and digital storage devices.
- Humidity can negatively impact records, but there is a lower risk for mold and other related concerns in Idaho's climate.
- Long-term exposure to artificial light and sunlight can cause records to fade and become brittle.
- Keep clean work areas to discourage pests, such as insects and rodents, from being drawn to areas where records are stored, such as file rooms, office spaces and server rooms.
- Dust, dirt and pollutants can permanently damage records and make them unreadable.
- Security measures that avoid theft and damage should always be front of mind to ensure records are protected.

AND, THEIR LOW-COST SOLUTIONS

- Use proper storage containers for records
- Avoid colored folders, post-it notes and damaging fasteners for permanent records
- Store records in a place that reduces unnecessary exposure to environmental elements, like high and constant heat
- Keep records away from pipes and other sources of water
- Keep records off the floor
- Practice regular housekeeping to keep records free of pests, dusts and human elements (such as oily hands, smoke, food and drink)
- Install devices to help monitor temperature, smoke detection and anti-theft security systems

INTELLECTUAL CONTROL

Intellectual control in records management differs from physical control. These concepts apply descriptive information to retrieve, describe and track records over the life cycle of a record. This ensures records are available when needed.

INVENTORY AND ASSESSMENT

An early step in establishing an effective records management program is to inventory agency records with an intent to identify and assess public records that are an asset to the agency. Intellectual control is key to making informed decisions about future strategies. The records management profession

provides many templates that can be used in the endeavor of inventory, assessment and audit. To begin, determine what records to include and what information about those records is important to capture. Here is a list of considerations for data collection in an initial assessment:

- Location
- Size/format
- Volume
- Condition/vulnerabilities (such as existing or potential damages)
- Office of record
- Information exempt from public disclosure
- Primary purpose
- Description and date range
- Arrangement
- Estimated annual accumulation

CLASSIFICATION AND RECORD SERIES

After an initial inventory is created to identify and assess current agency records, classify and align these records with an agency-specific retention schedule. The State of Idaho's *General Records Retention Schedule* should be consulted for information regarding the recommended retention for common record types and how to get started with an agency-specific retention schedule.

A record series is a group of records performing a specific function and organized in a succession of similar, correlated or corresponding items, occurrences or events. A record series will usually have the following characteristics:

- A sequence of documents that have a progressive order or arrangement
- A common sequence that relates to a particular subject or function, results from the same activity, or documents a specific kind of transaction
- Files are stored as a unit and may be transferred or destroyed as a unit
- May consist of a single type of form/record or a number of different types of records
- Has a filing order that must be maintained when using the information, inventorying or transferring the records

It may also be helpful to further classify records into one of the following categories:

- Vital Records: Irreplaceable information that is necessary to continue business operations without delay. These records are critical to the survival of any agency in the event of a disaster or extraordinary circumstances.
- Important Records: These records have significant value to the work of an agency and could only be reproduced after considerable time and cost.
- Useful Records: The loss of these records would cause inconvenience, but they could readily be replaced. They are not critical in an emergency.

The primary classification of files should be by function or record series. Secondary and tertiary classifications allow for records each primary classification to be arranged in the sequence in which they may easily be filed and retrieved. Commonly used arrangements include alphabetical, numeric, chronological, subject, location, number and agency.

A file classification system should:

- Relate to the way the records are used: The classification system should conform to the user's requirements for information and incorporate common terms when referencing the files.
- Be complete: Suitable classifications should be established for all existing records.
- Be flexible: The classification outline should accommodate additional file headings and the deletion of obsolete file headings.
- Be precise: Each file heading should describe the file contents and be phrased to be as exclusive as possible. (Minimize the number of terms used in file headings.)

FILE MANAGEMENT

After an inventory assessment and classification, more detailed decisions about a file management system can be made. Standardized file systems are important for:

- Integrity/Continuity of Records: Records remain complete and accessible despite changes in agency organization, personnel, and records keeping technology

- Efficiency: Minimize time searching for information
- Communication: A common filing language fosters cooperation in the retrieval and exchange of information throughout the agency and state government in general
- Records Retention and Disposition: Separates records with different retention values to assist retention and disposition activities

ESSENTIAL ELEMENTS OF FILING

- Simple: Enable quick and accurate filing and retrieval of records
- Logical: File headings are descriptive and arranged in natural sequence
- Usable: File headings relate to the function of records and the way the files are used
- Flexible: Accommodates expansion or contraction of records volume, multiple technologies, the transfer of inactive records to non-current storage, and the destruction of obsolete records

Questions to consider when defining a file management system:

- What are the functions and purposes of the files?
- Who uses the records?
- What kinds of information do the files hold?
- What technology and media are used?
- Is the system centralized or decentralized?

CENTRALIZED OR DECENTRALIZED FILE SYSTEMS

Centralized file systems minimize duplication of equipment, allow for full-time supervision, develop staff with specialized skills and minimize cost.

Files should be located in a centralized file system when records:

- Are referenced by several offices and or staff
- Need to be combined to assure that a complete representation is obtainable
- Can be in close proximity to users of the file
- Require the security of central filing

Files are usually located in a decentralized file system when:

- Files are used by one person or office (when the office is at a distant location) and seldom need to be combined with other files for future reference
- Information is required to be readily available at the workstation
- Retrieval rate is high
- The centralized filing system may be located in a distant location from the work activity

TRACKING BEYOND AN INITIAL INVENTORY

In addition to an organized list of current agency records, here are other inventory tracking methods that can bring value to agency records management:

- Box/file inventory of contents: While an initial assessment provides intellectual control at an enterprise level, agencies will also find it helpful to establish data requirements for specific sets of files.
- Chain of custody/transferred records: It is important that records are assigned a dedicated physical location that ensures retrieval is efficient and reliable. When a record is relocated, there should be documentation created to track the movement. Records transfers can be temporary (a simple file review that requires a file to be pulled from a centralized location for same-day office use) or long-term (an inactive record that transfers to the State Record Center for off-site storage). Here is a list of considerations for data collection in a transfer:
 - Check-out procedure:
 - Check-out date
 - Checked out by designee
 - Signature and name of person checking out record
 - Check-in procedure:
 - Check-in date
 - Confirmation record has been reshelfed
 - In addition to documenting the transfer of records in a centralized log, it is also important to document.
 - Attached to the record, keep documentation of the location where the file

- should be reshelfed
 - Retain documentation in the space where the relocated file should be returned
- Audits: Ongoing audits can help sustain records management tools within a robust program. The purpose of the audit should drive the approach and frequency of the audit. Audits are key to identify and proactively correct problems. Here are a few tips:
 - Prepare for the audit by identifying the scope of the project and the assessed data elements
 - Keep good documentation during the audit
 - Apply a consistent process throughout the work
 - Create a plan for when the audit is complete to address findings. Start with high-risk findings
 - Compile findings and resolutions in an outcome report

FINAL DISPOSITION OF RECORDS

The value of a record and the frequency of access drives decisions about storage, retention and the ultimate trigger for disposition. Disposition is not limited to the destruction of records. It simply points to the final action of a record according to a retention schedule. This action can be permanent preservation or destruction.

A records retention schedule delivers a systematic application to the disposition of agency records. It is critical that agencies develop agency-specific retention schedules. The State of Idaho *General Records Retention Schedule* should be used as a starting point in this endeavor.

DEFENSIBLE DESTRUCTION

Defensible destruction is key to the proper destruction of records management. All records destroyed onsite at the State Record Center require an approved disposal authorization request prior to the physical destruction of the records. This form is available on the State Record Center's web site.

The form can also be replicated for agency use to document destruction. It is a recommended method to ensure that historic records aren't destroyed and to properly document defensibly destroyed records. An alternative to the form can be used, but it is recommended to keep a log of destroyed records. Here is a list of considerations for data collection in a destruction log:

- Destruction date
- Record series/description
- Inclusive dates
- Volume
- Destruction authorization (such as the Series Group Number from a retention schedule)
- Signature

PRESERVATION OF HISTORIC RECORDS

All historic records are permanent, but not all permanent records are historic. Agencies should work with the Government Records Team at the Idaho State Archives to preserve historic records. The Idaho State Archives *Government Records Policy* outlines this process.

SUMMARY

This manual is reviewed and modified when necessary. Each of the areas covered in this document have additional industry resources that would provide a deeper dive into each issue. The Government Records Program can help point users to other professional resources, including the other technical resources referenced throughout this document. Contact the Idaho State Archives Government Records Program for questions about records management and archival services in Idaho.