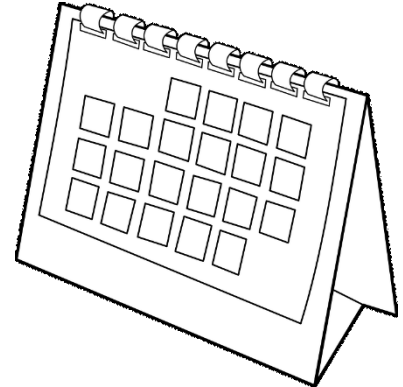


Using Records Retention Schedules: What to Do With Non-Work-Related Appointments in Calendars

Purpose: Provide guidance to state agencies and local government entities on managing electronic calendars that include both work-related and non-work-related appointments.

It is common for an individual's work calendar to also include some non-work-related events (such as doctor appointments, family-related appointments, and other such events not related to the individual's capacity as an elected official, agency head, or agency employee) when allowed by the agency's policies for the personal use of agency resources.

For records retention purposes, these non-work-related appointments **do not need to be kept**, and should be routinely deleted from calendars.



Here are some basic strategies:

Elected Official and Agency Head Calendars (Archival)

- Minimize the “co-mingling” of work-related and non-work-related records within agency calendars.
- Categorize/color/mark any non-work-related appointments so they can be easily identified.
- Routinely delete non-work-related appointments once they have served their purpose.
- **Prior to transferring to the Archives**, agencies should make sure to delete any remaining non-work-related appointments from the calendar.

All Other Employee Calendars (Non-Archival)

- Minimize the “co-mingling” of work-related and non-work-related records within agency calendars.
- Categorize/color/mark any non-work-related appointments so they can be easily identified.
- Routinely delete non-work-related appointments once they have served their purpose.

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

**www.sos.wa.gov/archives
recordsmanagement@sos.wa.gov**