



Electronic Records Management: Checklist for Evaluating Records Retention Capabilities in Software

Purpose: A checklist of retention considerations for state and local government agencies evaluating software solutions (such as databases, systems, apps, etc.).

Key questions to consider:

Has your agency identified the **retention requirements** for the records created/captured by the software?

Can the software **retain** records for their minimum retention period?

- Can retention periods be adjusted if requirements change?

Can the software **destroy** records that have met their retention?

- Can it apply simple retention based on the date created?
- Can it apply complex retention based on future events, such as end of calendar/fiscal year, termination of contract, or employee separation from the agency?
- Can you review records eligible for destruction or are they automatically deleted?
- Can records destruction be delayed or suspended for public records requests and/or legal holds?
- Is deleting records a standard function of the software?
- Are additional modules, upgrades, vendor support, and/or other expenses needed to destroy the records?

Can the software **export** records?

- Can the records be migrated to other software?
- Can the software export archival records for transfer to the Archives?
- Is exporting records a standard function of the software?
- Are additional modules, upgrades, vendor support, and/or other expenses needed to export the records?

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