



## **Retention Batching of State Records**

This advice is provided to inform organizations that **HAVE NOT** implemented the [General Disposal Authority for Source Records](#) (GDASR).

**Retention batching**, also known as **retention filing** or **retention boxing**, is the process of storing hard copy original records in accordance with the required retention period after the records have been scanned and captured into an organization's recordkeeping system. For example:

- all documents with a retention period of 2 years are placed together, in order of the date received, in a file or a box;
- all documents with a retention period of 7 years are placed together, in order of the date received, in a file or a box; etc.

This process is neither an effective nor an efficient records management practice.

The State Records Office (SRO) does not recommend retention batching for the reasons outlined below:

### **Disposal Triggers**

Although a group of records may have the same required retention period, the date on which the retention period commences is not necessarily the same. Therefore, a box of records will have differing due dates for destruction. Retention batching means that the organization must either:

- review every single document in a box ready for disposal; OR
- keep the entire box for the period of time required for the document with the **latest** disposal date.

This could mean keeping documents for much longer than necessary.

### **Storage**

The organization will incur increased storage costs resulting from keeping a box of documents until the latest destruction date, as described above.

### **Transfer of Archives**

The SRO will not accept a box of assorted, loose archival records covering different subject matters. Archives must be transferred to the SRO "in context", i.e. the records must be organized by the subject or activity to which they relate. Retention batching means that the organization must expend further resources to properly organize archival records in readiness for transfer to the SRO.

For further information, contact the State Records Office via email at [sro@sro.wa.gov.au](mailto:sro@sro.wa.gov.au).