

AUDIT ALERT

JUNE 13, 2019

RECORD RETENTION

During recent audit projects, we identified areas of improvement in record retention practices at the user Agency/Department/Office level. Every County Agency/Department/Office is responsible for establishing effective record retention procedures and practices over the County records under their respective authority in accordance with state retention guidelines. The County's Records Policy and Procedures Manual provides guidelines for employees and officials throughout the County regarding the control and disposition of all County records. A record retention schedule helps to ensure that important and valuable documents (those of legal, fiscal, administrative, or historical value) evidencing an organization's activities are protected, stored, and accessible.

Record retention is a part of the County's systematic control over the County's records and important documents.

Below are keys steps and questions to ensure effective record retention activities exist at the user Agency/Department/Office level:

- Review the County's Records Policy and Procedures Manual.
- Review the Records Retention and Destruction videos¹.
- Review the State Record Retention Guidelines for Local Government Records or Court Systems.
- Establish written record retention procedures within your Agency/Department/Office, to include at a minimum, the following:
 - * What records should be retained?
 - * How long should the records be retained?
 - * What medium should the records be retained (i.e. physically or electronically?)
 - * Method of record disposition.
 - * Training procedures for new and transitioning employees.



For specific information, please contact:

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¹ Located on iCOBB under the COBB Academy tab ⇒ Contract Mgmt. Classes ⇒ Record Retention and Destruction link