

Instructions for Use of Forms

Please **READ CAREFULLY** the following substantive changes

FORM RCB-2U REPLACES FORMS RCB-2 AND RCB-2E

- “Records” are defined by G. L. c. 30, § 42 as “all books, papers, maps, photographs, recorded tapes, financial statements, statistical tabulations, or other documentary materials or data, regardless of physical form or characteristics.” Because the law does not distinguish between paper and electronic records, only one Destruction Permission form is necessary.
- Use FORM RCB-2U to request permission from the Records Conservation Board (RCB) to destroy the paper or electronic copy of a record that is maintained to satisfy the retention requirements of this schedule (“last copy”).

For example: If you scan a paper copy of written correspondence into an electronic format, you need only keep either the paper or electronic copy for the required retention period and the other may be destroyed. After the retention period has expired, you need only request destruction permission for the copy you retained for the retention period.

- Only records that have a retention period in “Years” (e.g., 3 Years, 6 Years, 20 Years, 35 Years, etc.) should be listed on FORM RCB-2U.
- **DO NOT** use FORM RCB-2U (or any other Form) to request permission to destroy records with a retention period of “Retain until administrative use ceases.” Administrative use records **DO NOT** require permission to destroy.

FORM RCB-1E HAS BEEN ELIMINATED

- Agencies have an obligation to maintain all records in a safe, secure, and searchable manner, including electronic records.
- Agencies should use best practices in meeting these obligations. Just as an Agency is required to keep paper records to ensure safety from flood, fire, or theft, and to maintain their accessibility, so too must an Agency decide where to keep its electronic records. Agencies are strongly encouraged to consult with their Legal and Information Technology Departments to achieve these goals.
- The RCB offers its guidance on electronic records maintenance by directing Agencies to the *Electronic Records Management Guidelines* in the Appendix at the end of this schedule.

Please NOTE the following procedures:

USE ONLY THE CURRENT FORMS

- Agencies should begin using the new FORM RCB-2U immediately.
- Beginning July 1, 2014, only FORM RCB-2U will be accepted for the destruction of records.
- FORM RCB-2 will no longer be accepted after July 1, 2014.
- Effective immediately, no FORM RCB-1E or RCB-2E will be accepted for review. This schedule will be adjusted to make such obsolete forms “Administrative Use” records of the RCB which may be destroyed upon receipt.
- FORMS RCB-2M (for the destruction of paper records after microfilming), RCB-2T (for the transfer of records to the State Records Center or the State Archives), and RCB-4 (Records Liaison Officer Designation) remain in use. However, please check this schedule periodically for updates or revisions.

USE OF THE NEW RCB-2U (UNIVERSAL)

- This form has been made user-friendly. The information that is requested is more specific and requests for unnecessary or redundant information have been eliminated.
- The “Certification” has changed. In some cases, the person filling out the form may not be the person attesting to the destruction eligibility of the records listed. It is critical that the certification be signed by someone in the Agency familiar with any consequences that may result from the untimely destruction of records.

CHECK THE INFORMATION BEFORE YOU SUBMIT

- Make sure that the description of the records matches the corresponding section number and retention period.
- Check your math. Make sure all records in the listed date range have reached the minimum retention period as delineated in this schedule.
- If you any have questions concerning this form, please contact the RCB at (617) 727-2816.