This is guidance for how to enter Date Closed (i.e. Cutoff Date) in Content Manager. This guidance is the same for both folders and boxes.

The Date Closed [i.e. Cutoff Date] is very important. It is the trigger that begins the retention period.

The date entered is what the system uses to calculate the retention period, so it must be entered correctly.

What is the Date Closed?

The date closed is the date that records become inactive. For most records, this is when they are no longer used for the reason they were created and are not accessed frequently.

How do I know what to enter for the Date Closed?

The records retention schedule will provide instructions for how to enter the date closed for each type of record.

For retention schedules on the Records Management website, refer to the “Cutoff” field for each type category. For retention schedules within Content Manager, refer to the “Retention Period Cutoff” field.

What do I need to do?

Enter the date closed for folders or boxes into Content Manager as directed by the retention schedule guidance. Do not add the retention period in yourself, the system will do the math for you.