Adding a classification to a Classification Folder in CM 9.3

The first step is to **locate the record** for which you're building the classification folder on your **retention schedule**. You'll need to know whether the record is on a general schedule or a special schedule, all of which can be found [here](#):

Records Retention Schedules

Overview

- About schedules
- Frequently asked questions
- Glossary

General Records Retention Schedules

- State agencies
- State boards and commissions
- Cities
- Counties and special districts
- Schools, school districts and educational service districts (ESDs)
- Community colleges
- Oregon University System

Special Records Retention Schedules

- State agencies

As an example, let's say you work for a **city** and want to enter **accounts receivable records**. You'll open the **city general retention schedule** via the link in the above image, and then on your keyboard **press "ctrl" and "F" simultaneously**, which will open the **search window** circled towards the top of the below image. Here you can search keywords related to the record you wish to find, in this case "accounts receivable", which will lead you to the relevant series, as circled in the middle of the below image:

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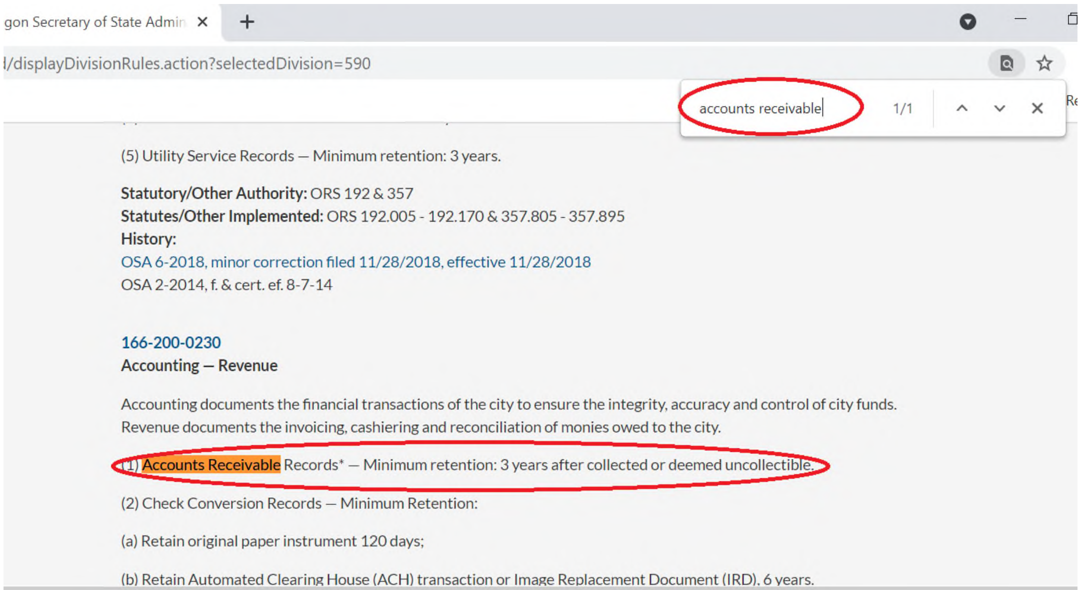
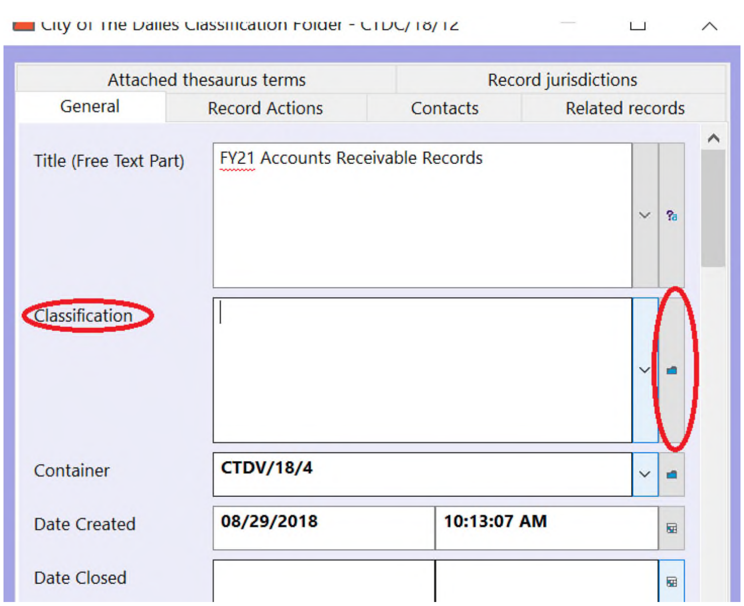
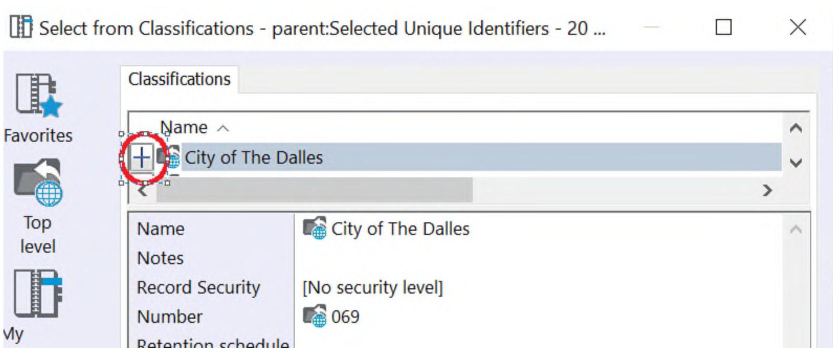


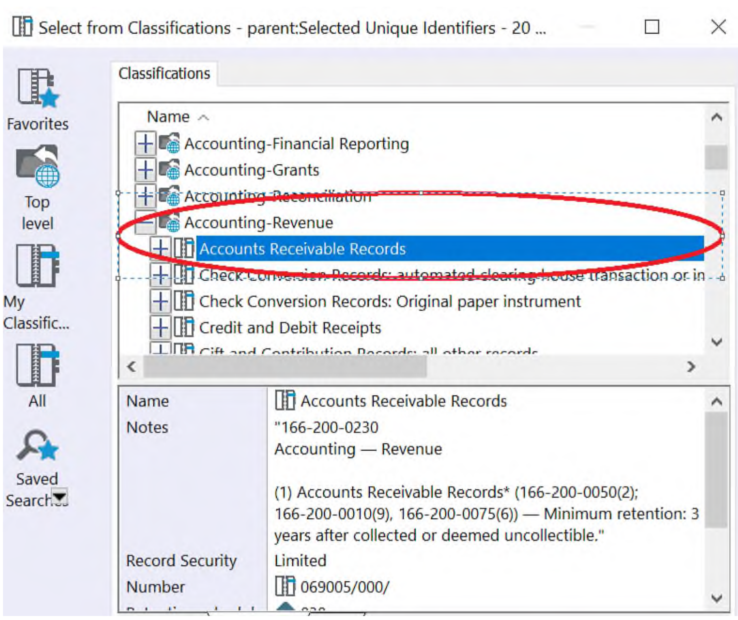
We note that Accounts Receivable Records is in the **Accounting – Revenue** section of the city schedule. We now go to our classification folder and click on the **blue folder to the right of the Classification field**:



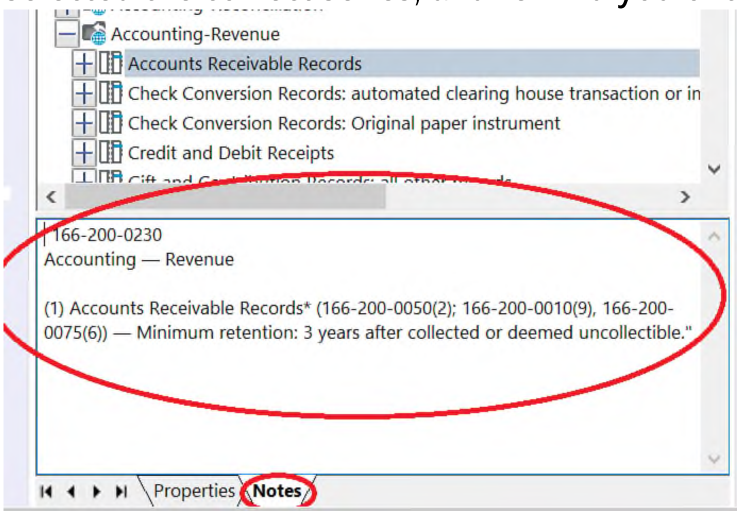
In the upper pane of the resulting window, click on the **plus sign to the left of your agency name** to open your retention schedule:



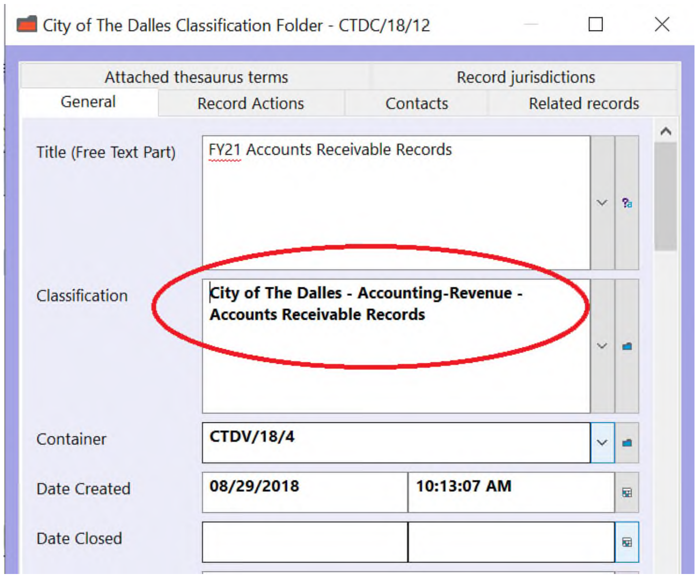
You'll now see the **various sections of your retention schedule** – what you see in this window should correspond exactly, section by section to the schedule you see online. For our example, we remember that Accounts Receivable Records are in the Accounting – Revenue section, so we navigate there and select Accounts Receivable Records by clicking on it once:



In the same window, click on the **Notes tab in the lower pane**, where you will find the information for the highlighted series copy and pasted from the retention schedule – this is a way for you to verify that you have indeed selected the correct series, and remind you of the associated retention period:



Once you have selected the appropriate the classification, you can **hit OK at the bottom of the window**, and you will find that it has been added to your classification folder:



You have now successfully added the classification, and in so doing applied the relevant retention period, in this case 3 years after collected or deemed uncollectible. Your next step is to determine which of the Date Created and Date Closed fields are the relevant trigger for this retention period (for this example it is the Date Closed field), so you can inform the folder when the 3 years should elapse from. That concept is covered in its own set of instructional resources.