Getting Started with Records Management

☐ Step 1: Know the responsibilities of being the Record Liaison.
Each department should have a Record Liaison. If uncertain who the Record Liaison is for the department, please contact the URIM Office Assistant (2-1670) with questions.

☐ Step 2: Identify department records by completing a Department Retention Schedule.
Identify records in the department, where they are, and how long they should be kept.

☐ Step 3: Organize the physical records.

☐ Dispose of unnecessary records and non-records.
(Check first to see if the department is on Litigation Hold.)

☐ Secure confidential records.

☐ Send inactive records to the Records Center.

☐ Step 4: Organize the electronic records.

☐ Dispose of unnecessary records and non-records.
(Check first to see if the department is on Litigation Hold.)

☐ Secure electronic records by moving them to SharePoint or another secure location.

☐ Move records of historical value to the “Send to Archives” folder in SharePoint.