Getting Started with Records Management

☐ **Step 1: Know the responsibilities of being the Record Liaison.**

☐ Attend Record Liaison training, either online or in-person.

Each department should have a Record Liaison. If uncertain who the Record Liaison is for the department, please contact the URIM Office Assistant at 2-1670.

☐ **Step 2: Complete a Department Retention Schedule (DRS).**

☐ Identify records in the department and how long they should be kept.

☐ Identify records that need to be managed by retention or preserved for future generations.

☐ **Step 3: Plan.**

☐ Decide which electronic records should be kept in Box or SharePoint.

☐ Decide which paper records should be stored in the University Records Center or kept in your office.

☐ **Step 4: Manage.**

☐ Move electronic records to Box, SharePoint, or another approved location.

☐ Manage permissions.

☐ Retention is managed.

☐ Historical records are preserved.

☐ Send inactive paper records that are no longer needed by your department and have not met their retention to the University Records Center by calling 2-2828, or sending an email to urim@byu.edu.

☐ Dispose of unnecessary records and non-records.

  (Check first to see if the department is on Litigation Hold.)

  Call BYU Recycling at 2-4662, or send an email to recycling@byu.edu for help.