Getting Started as the Record Liaison

☐ Step 1: Record Liaisons are invited to take training on their duties.

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

Each department on campus should have a Record Liaison, typically assigned by the department head or supervisor. If uncertain who the Record Liaison is, please contact University Records and Information Management: 2-1670.

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

☐ Identify records in the department and how long to keep them.

☐ Identify historical records to be preserved for future generations.

☐ Step 3: Plan.

Using the completed DRS:

☐ Decide which electronic records to keep in Box, SharePoint, or other approved locations.

☐ Decide which paper records to store in the University Records Center or in the department.

☐ Step 4: Manage.

☐ Move finalized electronic records from the day-to-day work area to the University Records area of Box, SharePoint, or other approved locations at least once a year.

✓ Retention is managed.
✓ Historical records are preserved.

☐ Send inactive paper records that have not met retention and are no longer needed by the department to the University Records Center. Call 2-2828 for support.

☐ Dispose of paper and electronic non-records and records that have met their retention.