

# Getting Started as the Records Liaison

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

Take the Record Liaison training online by going to [training.byu.edu](https://training.byu.edu) and searching for “Records Liaison” in the catalog. Please contact 2-6260 with any questions.

\* Tip: Each department on campus should have a Records Liaison, typically assigned by the department head or supervisor. If you are uncertain who your Records Liaison is, please contact us at 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.

\* Tip: To view the Records Transfer Sheets of department boxes previously submitted to the University Records Center, go to the [Records Liaison Hub](#) on our website.

\* Tip: To schedule a Department Retention Schedule appointment with the URIM Records Analyst, please call 2-6260

## Step 3: Plan.

Using the Completed DRS:

- Decide which electronic records to keep in Box or another approved location.
- Decide which paper records to store in the University Records Center and which to store in the department.

## Step 4: Manage.

- Move Finalized electronic records from the day-to-day work area to the University Records area of Box or other approved locations at least once a year where:
  - \* Retention of records 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 using the eRTS system. Please call 2-2828 for support.
- Dispose of paper and electronic information (non-records) that are no longer needed by the department.
- Suspend the deletion of all records and information if your department has received a Litigation Hold from the Office of the General Council (OGC).