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 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).