

Getting Started as the Records Liaison

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

Take the Record Liaison and ERC trainings 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 previously submitted Records Transfer Sheets for department boxes at 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.

Inact your plan:

- Move finalized electronic records from the day-to-day work area to the Electronic Records Center on 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).