

Permanent Records

A guide for determining what to do with administrative records with a permanent retention period

Per the UC Records Retention Schedule, some of your records must be retained permanently but you're not sure what to do

- Some of the records are in paper, some are electronic.
- Your office is interested in conserving space.
- Your office is interested in maintaining records electronically.
- The schedule states: "Permanent, subject to University Archives review. Coordinate the transfer of these records to the University Archives when no longer needed for current operational business." However, you don't find University Archives in the UCOP directory.

Follow the steps below to determine what to do when you have permanent records.

<u>STEP</u>	<u>ACTION</u>	<u>COMMENT</u>
1	DETERMINE if the records are used	
	A. The records <u>are not used or are very rarely used</u> to conduct day-to-day business.	Your records may be <u>eligible for the UCOP Central Records Collection</u> . See the <u>Submission Guidelines, for the UCOP Central Records Collection</u> on the Central Records Collection page: http://www.ucop.edu/information-technology-services/units/immediate-office/records-management-services.html
	B. The records <u>are used constantly</u> , some even daily	You will need to maintain the records in your office. For permanent records see BFB-RMP-2, Appendix C: Record Preservation Considerations, pp 23-26: http://policy.ucop.edu/doc/7020454/BFB-RMP-2 For paper records, an electronic document management system may be a viable option. See the CDL guidelines on scanning permanent records: http://www.cdlib.org/inside/diglib/guidelines/bpgimages/ http://www.cdlib.org/services/dsc/contribute/docs/cdl_gdi_v2.pdf
	C. The records are part of an <u>ongoing litigation, audit or investigation</u>	Ask the attorney, auditor, or other official what to do with them.