UNIVERSITY OF CALIFORNIA Records Management

# Quick Records Management Tips

## HANDLING RECORDS

1. **Review** your non-records, and delete/toss/shred/recycle what you no longer need. If you aren't the unit responsible for the records, your copies are non-records. You should dispose of them as soon as they are no longer needed by your office but no later than the retention period used for the official record.

2. **Find** your personal papers, take them home with you.

3. **Finalize** your records once a project has been completed. In MOST cases, working papers and earlier drafts do not need to be kept after a project has been completed.

4. **Separate** your records into 2 groups – Active and Inactive.

5. Review your inactive records, referring to the records retention schedule.*

   - **Delete/toss/shred/recycle** the ones with expired retention periods – unless the records are under a records hold.
   - **List** the folders using the detail level that you need to make future access easy.
   - **Transfer** the ones that still need to be kept to our off-site commercial records center, Iron Mountain. Remember – out of sight does not mean out of mind – you will need to keep track of these and destroy them when the retention period has lapsed.

Records@ucop.edu
510-987-0399

*https://recordsretention.ucop.edu/