### Action

1. **IDENTIFY** your records. Create a spreadsheet with columns: title of the folders, dates of records, owner of the records, and the retention period. Leave a column for other comments, such as what needs to be done with the records, and if they are confidential.

2. **DETERMINE** who uses the records, if they are used.

3. **CHECK** the UC Records Retention Schedule for the types of records you have.
   - a) Retention period has *lapsed* and no one uses the records
   - b) Retention period has *lapsed* but people still need the records
   - c) Retention period has not *lapsed*

4. **DETERMINE** how the records are used
   - a) The records are *not used or are very rarely used* to conduct day-to-day business.
   - b) The records are *used constantly*, some even daily.
   - c) The records are part of an *ongoing litigation, audit or investigation*.

### Notes

1. You should have a list of your records. You can get a list of folders in shared drives, CDs, and flash drives by copying the file path from Windows Explorer and pasting it into the address bar in Chrome; you can then copy the contents into your spreadsheet.

2. These are the people who can help you identify the records and determine whether they are still needed.

3. [http://recordsretention.ucop.edu/](http://recordsretention.ucop.edu/)
   - a) Destroy or delete the records. Shred confidential or restricted paper records: BASC Shredding. For confidential or restricted electronic records see UCOP Institutional Information Disposal
   - b) Contact Records Management to discuss your situation - records@ucop.edu
   - c) Proceed to Step 4

4. Are they hardly ever used or frequently used?
   - a) Send paper records to off-site storage. See Using Off-site Storage.
   - b) Records can be scanned, contact Records Management.
   - c) Ask the attorney, auditor, or other official what to do with them.