

## What to do with Administrative Records

ACTION	NOTES
<p>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.</p>	<p>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.</p>
<p>2. DETERMINE who uses the records, if they are used.</p>	<p>2. These are the people who can help you identify the records and determine whether they are still needed.</p>
<p>3. CHECK the UC Records Retention Schedule for the types of records you have.</p> <p>a) Retention period has <u>lapsed</u> and no one uses the records</p> <p>b) Retention period has <u>lapsed</u> but people still need the records</p> <p>c) Retention period has not <u>lapsed</u></p>	<p>3. <a href="http://recordsretention.ucop.edu/">http://recordsretention.ucop.edu/</a></p> <p>a) Destroy or delete the records. Shred confidential or restricted paper records: <a href="https://go.ucsd.edu/2Hd6atT">https://go.ucsd.edu/2Hd6atT</a>. For confidential or restricted electronic records, see <a href="https://go.ucsd.edu/2HfldDo">https://go.ucsd.edu/2HfldDo</a>.</p> <p>b) Contact Records Management to discuss your situation - <a href="mailto:records@ucop.edu">records@ucop.edu</a></p> <p>c) Proceed to <b>Step 4</b></p>
<p>4. DETERMINE how the records are used</p> <p>a) The records <u>are not used or are very rarely used</u> to conduct day-to-day business.</p> <p>b) The records <u>are used constantly</u>, some even daily.</p> <p>c) The records are part of an <u>ongoing litigation, audit or investigation</u>.</p>	<p>4. Are they hardly ever used or frequently used?</p> <p>a) Send paper records to off-site storage. See <a href="#">Using Off-site Storage</a>. Records can be scanned, contact Records Management.</p> <p>b) Ask the attorney, auditor, or other official what to do with them.</p>