

USING RECORDS RETENTION SCHEDULES

Records retention schedules are one of the core documents of a records management system. These schedules detail the life cycle of a record. They identify the record series and prescribe how long series must be maintained, as well as their ultimate disposition of either destruction or preservation.

Retention schedules must be approved by the State of Michigan. A general records schedule has been approved by the state and is included in the appendix of this manual. It contains descriptions of many common types of records in the University. **This schedule is not intended to cover records that might be unique to a department or office.** Special schedules for such records are developed in cooperation with the University Archives and Records Management Program and offices during the survey process and will be added to the manual at a later date. Office retention schedules are reviewed annually.

To read the retention schedules, work from left to right. The first column entitled “Record Series/Description” is a brief title that captures the function of the record (i.e. Correspondence or Publication.”), and a paragraph detailing the types of records commonly found. This list does not need to be all-inclusive. Record series titles are created by the department and archivist, and will be as consistent as possible across University offices. Column 2, or “Department Retention” details the estimated high-reference usage for the records. The third column “Records Center Retention” identifies legal requirements for keeping records that may no longer be frequently used. The fourth column, “Archives” describes the ultimate disposition of the records that have some historical information. Not all of these records may be kept permanently, but they must be reviewed by the University Archives and Records Management Program prior to destruction. Other records, such as receipts and bookkeeping documentation may say “Destroy.” These records are not permanent and should be transferred to the records center for destruction. **NO RECORDS MAY BE DESTROYED WITHOUT PROPER CERTIFICATION.** (See Destruction of Records.) Non-records as detailed in the retention schedule, may be destroyed in offices without certification. If there are any questions of what constitutes a record, and whether certification is needed, contact the University Archives.