


Contact us:

To make an appointment with the Records Management Team please email or telephone using the contact details below.

 0151 794 5675 (internal x45675)

 recman@liverpool.ac.uk

Useful links:

Records Management website:

www.liverpool.ac.uk/csd/records-management/

Retention Schedule:

www.liverpool.ac.uk/csd/records-management/retention-schedule/

Confidential Waste Service:

www.liverpool.ac.uk/csd/records-management/storage-and-disposal/confidential-waste/

Advice and guidance for managing your records:

<https://www.liverpool.ac.uk/csd/records-management/advice-and-guidance/guidance-notes/>



Records Retention Guide:

How long to keep your records

To be used in conjunction with the University Retention Schedule:
www.liverpool.ac.uk/csd/records-management/retention-schedule/

The Retention Schedule and 'Making a Decision' pullout

You will need to consult the Retention Schedule which provides a list of the records created, received, and maintained by the University.

www.liverpool.ac.uk/csd/records-management/retention-schedule/

The Retention Schedule also provides details on the **length of time** the records are to be retained for operational and regulatory requirements.

The 'Making a Decision' pullout contains guidance on how to identify University records and a flowchart with a series of questions. These questions have colour coded responses to aid you in choosing one of the coloured options below.

If you are unsure about the right course of action please contact Records Management (see the back of this guide for contact details).

A) Retain in the Office

Instructions for records which are referred to on a regular basis.

Set a new review date based on the Retention Schedule and how long the records are needed for operational and regulatory requirements.

Choose a suitable storage location for hard copy or paper records within the office or working environment. Electronic records should be stored on the University network e.g departmental drives or M: drives.

Ensure that password protection or limited access measures are implemented if required.

Avoid using removable media for long term storage as USB drives, CDs and DVDs have a limited life span and are not backed up on University systems.



B) Retain in Semi-Current Storage

Instructions for records which are not referred to on a regular basis but cannot be disposed of yet.

As with Section A, consult the Retention Schedule and **set a review date**.

Choose an appropriate location for the records. If they are needed regularly for legal or audit purposes, store them within the office environment. If the records are not required on a regular basis, they can be stored in the Records Centre storage facility. Semi-current electronic records should be retained in a folder designated for long term storage and placed on University file space.

Ensure that **password protection** or **limited access measures** are implemented if required.

University records should be stored on University network file storage e.g. departmental drive or M: drive. Avoid using USB drives, CD or DVDs - they have a limited life span, are easily lost and are not backed up on University systems.



C) Offer to University Archives

Records marked for permanent retention or those with potential historical value, could be transferred to the University Special Collections and Archives at the Sydney Jones Library:

www.liverpool.ac.uk/library/sca/



D) Disposal of Records

Consider keeping an audit trail for any decisions made, and actions performed with respect to the disposal of records.

Ensure that you dispose of all versions of the records in all locations.

Dispose of confidential paper records using the Records Management confidential disposal service:

www.liverpool.ac.uk/csd/records-management/storage-and-disposal/confidential-waste/

Dispose of non-confidential paper records using the appropriate recycling bins.

All versions of electronic records should be deleted from all locations including your computer desktop, M drive, departmental drives, emails and from any external storage devices.

The confidential disposal service mainly deals with paper records but can also take physical items (packaged separately) such as CDs, magnetic tape, x-rays, video tapes and ID cards.

Dispose of redundant IT equipment via the IT Asset Disposal Service:

www.liverpool.ac.uk/csd/my-computer/disposal/

