Making a Decision

About managing university records

Step through the questions below then use the retention schedule at **www.liv.ac.uk/csd/records-management** and use the flowchart overleaf for guidance on how to manage university records.

Was the record created or received by the University in the course of business?

Records created in a previous job or those of a personal nature are not covered by this guidance.

Is it trivial?

Notes for information which are no longer needed, e.g. telephone messages, should be destroyed.

Is it published?

Published or reference material such as telephone directories do not count as records.

Is it a duplicate or a copy of the original record?

Duplicates or copies of original records are themselves records but should be kept only as long as required and no longer than the original.

What to do with it

Check the Retention Schedule

Do the records need to be referred to on a regular basis?

Yes → **A. Retain in Office**

No

Are there any legal, audit or other requirements for retaining the records?

Yes → **B. Retain in Semi-Current Storage**

No

Do the records have historic value?

Yes → **C. Offer to University Archives**

No

D. Dispose of Records

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