UNIVERSITY OF LIVERPOOL | COMPUTING SERVICES

Records Management Guidance:
Office detox: sorting through your paper and electronic records

Definition

An office detox day or week is a dedicated time when everyone in a particular section or department takes some time to sort through paper and electronic records, and identify those which need to be kept and those which can now be destroyed.

Purpose & Benefits of Office Detox

An office detox is a useful exercise to promote efficient working, highlight problems, and help individuals and teams of staff to reflect on the records that they create and the ways in which they are maintained. It can also be very useful when relocation is imminent.
N.B. An office detox day should be used to complement regular reviews of records.

Checklist of Hints & Tips for Office Detox Participants

- Consult the University Retention Schedule and the Records Retention Guide: how long to keep your records to determine appropriate actions for records i.e. retain, destroy, transfer to archives.
- Remember to look at paper and electronic records (including your email account!!). Use the same criteria for all formats. Consider the following: Do you have the final version, or a draft? Is the final version retained elsewhere? If there are electronic and paper versions of the same records, do both need to be retained?
- Use the Records Management website to help with queries about specific record types/situation e.g. for help with tackling records which are no longer used, or have been inherited from another staff member/system, see the Guidance Note on Legacy Records.
- Contact Records Management if you have any queries or would like further help and support preparing for the detox or on the day itself.

Organising an Office Detox

Before the Event

- Get permission from your Team Leader/ Head of Section. Clarify details e.g. which staff teams will be involved, which filing cabinets/ areas of the shared drive will be targeted.
- Plan and prepare well in advance: give colleagues plenty of notice and add the event to your section's calendar.
- Raise awareness and interest: use publicity e.g. posters and emails.
- Circulate details of the event explaining what the objectives are, and how everyone will benefit. Also circulate links to the Records Management website and University Retention Schedule for reference when sorting records.
- Consider spreading the event over a number of days to give opportunities for as many people as possible to participate e.g. you could have two mornings of office detox in a particular week.
- Contact Records Management well in advance to request boxes and bags, and book a collection slot for transfer of records to semi-current storage and/or collection of confidential waste.

On the Day

- Encourage everyone to join in. Offer incentives such as free coffee and cake or prizes for the tidiest office, most emails deleted etc.
- Make sure you only clear out/ look at records that you and your section are responsible for, this includes:
    - Paper records in filing cabinets, cupboards, drawers and on shelves.
    - Electronic documents in your M Drive and shared section folders.
    - Emails in your University account and your section's account.
- Have a supply of boxes, confidential waste sacks and recycling bags ready.
- Identify records which are used infrequently, but need to be retained, box and list, before transferring to the records centre.
- Ensure that disposal actions are recorded where necessary to satisfy legal, audit and compliance requirements.
- If in doubt about the appropriate actions for any records, contact Records Management for advice.
- Ask colleagues to keep a tally of emails they delete, and let the team leader/ organiser know, so that an overall total can be reported at the end of the week/ day.

After the event

- Provide statistics on what has been achieved, for example:
    - Number of confidential waste and recycling sacks filled.
    - Number of emails deleted.
    - Amount of server space freed up (contact Computing Services Department in advance for help with this).
    - Amount of space cleared in filing cabinets/shelf space cleared.
- Thank everyone for their participation.