Records Management
Information Technology Services

Tips for Managing Your Records

- Review emails regularly and delete transitory messages once they are obsolete, including your Deleted Items and Sent Items folders.

- Discard duplicate print and electronic documents when you are sure the master has been filed.

- Dispose of draft versions of documents and working materials that you don't need to keep when you are sure the final version has been distributed and a copy filed.

- Securely destroy supplies of blank forms and business cards once they are obsolete.

- Discard routine, external publications once they have been circulated and/or you no longer need them.

- Dispose of information with short-term value once you have acted on it.

- Send your confidential transitory records and student work to Records Management for secure disposal.

- Familiarize yourself with the University of Lethbridge Classification system and contact Records Management when you have questions.

We are all Records Managers!

Records Management
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records@uleth.ca
uleth.ca/records-management

Services We Provide

- Storage of semi-active and inactive University records

- Retrieval of records stored in the Records Centre

- Confidential shredding

- Confidential destruction of magnetic media (CD/DVD, video tapes, etc.)

- Guidance for the classification and retention of University records

- Liaison between University departments and the University Archives

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Records Management Basics

- University employees have an obligation to create accurate records of their activities and to ensure that these records are managed in accordance with the Records Management policy.

- Personal information contained in University records must be created, maintained, protected and disposed of in an appropriate manner, in accordance with all applicable laws and policies.

- All University records, regardless of their format or location, are the property of the University, not individuals, departments, or faculties.

- University records may not be removed from the University's control or destroyed, except under the authorization of the Records Management policy.

- The retention of University records is scheduled and authorized so that they are retained only for as long as they are needed.

- University records of historical value will be preserved in the University Archives and access provided where restrictions do not apply.

- The University Records Management policy, program, and practices are based on current professional standards and are in accordance with all applicable policies, contracts, regulations, and laws.

There is as much risk in keeping records too long as there is in not keeping them long enough.

Record Life Cycle Management

The Records Management department supports the management of information throughout its life cycle, regardless of format, from the creation of a record through to its disposition.

Records Management Tools

There are two major tools used to manage University records:

1. A **Classification System** that organizes information based on business functions, processes, and activities.

2. A **Retention Schedule** that provides guidelines for retaining University records. Retention schedules apply to all records, in all formats, in all departments/faculties.

The **University of Lethbridge Classification System (ULCS)** incorporates both tools into one document for ease of use.

uleth.ca/records-management/classification

Definitions

All employees are responsible for distinguishing University records from transitory records and non-records.

University records are all documents, data, and recorded information created, received, and maintained as evidence of the activities of the University. Records can be in any medium or format. **This includes email.**

To ensure compliance with University policies and applicable legislation, University records must be retained and disposed of in accordance with an approved retention schedule.

Transitory records are records of temporary usefulness that are needed only for a limited period of time in order to complete a routine action or prepare an ongoing record. They are not needed as evidence of a business activity to meet legislative obligations.

Transitory records should be destroyed as soon as they are no longer required. Transitory records that contain personal or confidential business information, or have the potential for misuse (e.g. obsolete stationary) should be shredded.

Non-records are documents such as reference material, personal records, and external publications.

Non-records may also be works created as a result of intellectual or artistic activity and acquired or developed in preparation for teaching or in the course of research (unless created under a contract with the University that specifies otherwise). Ownership of intellectual property is in accordance with the applicable handbook, manual, or contract.