

## About University Records Management

The University Records Management program in University Archives & Historical Collections (UAHC) promotes efficient administration and management of Michigan State University records. The program staff provides guidance on maintenance, retention, and storage of official records based on their legal, administrative, and historical value to the university.



## Contact

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<http://archives.msu.edu>

## What to keep and discard

The record types listed below are examples. For specific questions, please contact the University Records Management staff for guidance.

### KEEP

- Official correspondence, annual and summary reports, final grant reports, special reports, policy statements, and procedures
- Speeches, presentations, and recorded performances and events
- Faculty/staff meeting minutes and agendas
- Publications, such as catalogs, newspapers, yearbooks, research magazines, newsletters, brochures, event programs, and posters
- Films, recordings, tapes, and photographs, including samplings of material created as part of teaching programs
- Course syllabi, curricula, and instruction notes
- Student organization records, including minutes, publications, and photographs

### DISCARD

- Advertising circulars and product catalogs
- Personal correspondence
- Nonuniversity publications

## University Records Management



## Why records management is important

Records management is important to ensure compliance with institutional policies and state and federal laws that include the Family Educational Rights and Privacy Act (FERPA), the Freedom of Information Act (FOIA), and the Health Insurance Portability and Accountability Act (HIPAA).

Law requires specified documents to be kept permanently and others to be destroyed to avoid increased risks in litigation. Records management also increases administrative efficiency and frees up limited office space and server storage. These benefits are achieved through the use of records retention schedules.

## What is a university record?

According to the International Organization for Standardization, a record is “information created, received, and maintained as evidence and information by an organization or person, in pursuance of legal obligations or in the transaction of business.” (ISO 15489)

A record series is a set of documents that are identical in form and/or function and have approximately the same date, fiscal year, or chronological grouping. Active records are documents currently being used by a department on a daily or monthly basis. These records are retained at the department.

Inactive records are used no more than a few times a year. These records can be sent to University Archives & Historical Collections (UAHC) after they have been retained at the department for at least one year after the date of their creation.



## University records ownership



The records of the administrative, operation, or governance of university officers and offices are the property of Michigan State University. All university records must be

preserved, stored, transferred, destroyed, or otherwise managed according to the mandate established by the MSU Board of Trustees. While the records of faculty scholarly output are not directly addressed here, similar care and consideration should be given to their stewardship.

## Retention schedules

Retention schedules are a set of policies and procedures that identify and describe an organization's records. Retention schedules provide instructions for the disposition of records throughout their life cycle. General schedules are designed for record types that are common to many units within the university. A number of general retention schedules are available for the following types of university records:

- Academic
- Administrative
- Fiscal
- Legal
- Information Technology
- Personnel

Specialized schedules are designed for record types that are unique to a particular university unit. The University Records Management program staff

are available to assist in the creation of specialized schedules with offices and departments as necessary. For guidance on transferring records, please contact the UAHC at (517) 355-2330 or [archives@msu.edu](mailto:archives@msu.edu).

## University Records Management services

The University Records Management program staff are available to help MSU units by:

- Inventorying business records
- Identifying applicable retention schedules
- Training unit records liaisons
- Identifying vital business records
- Preserving historical records
- Storing and disposing of inactive records
- Providing staff training and guidelines
- Assisting faculty with disposition of papers and data

Electronic records and document management assistance includes:

- Historical data retention
- Shared folder structures
- File name standardization
- Business classification schemes
- Version control
- Keyword indexing
- Vital records identification
- Long-term preservation strategies
- Curation of research data
- Preservation of scholarly output

## RECORDS LIFE CYCLE

