Step 1: Appoint a Records Custodian

Each department appoints a records custodian, who will attend annual training and familiarize themselves with applicable laws and regulations relating to their subject area of work.

Step 2: Survey Records

Each department categorizes and classifies all of their records in accordance with the UMass Boston standard schedules, which can be found on the Contract and Compliance website. If a department has records that aren't included on the standard schedules they will work with the Records Administrator (the Assistant Vice Chancellor for Contracts and Compliance) to determine an appropriate retention period, which will be added to the standard schedules.

Step 3: Input Records to the Database

Each department inputs data on all of their retained records into the online records database, which is linked to the Contracts and Compliance website. The database lists:

- All types of records owned by the department;
- The time period for which each category of records must be retained;
- The records' storage location; and
- The appropriate method of disposition.

Step 4: Property Store Records

Records can be maintained either on UMass Boston property, in the University Archives and Special Collections, in the State Records Center, or in private storage facilities.

Departments should review their records periodically to ensure they are being retained properly.

Step 5: Properly Dispose of Records

- The Records Administrator will set an annual date on which all records whose retention periods have expired in the preceding 12 months must be destroyed.
- Departments must contact the University Archives and Special Collections for review before disposing records of any records that may have historic value.
- Departments must complete a records disposal form for records that have retention schedules.
- The method of destruction depends on the content of each record. Records with personally identifiable information are confidential and should be placed in locked areas until they can be shredded. Records that contain no personal information can be recycled. **When in doubt, shred!**

Step 6: Update the Database

- After disposition, departments must update the database with information on all of their records that have been disposed of.