

Simplify your move: Review paper records and documents

Please review your records as a part of the preparation for a move to a new location. Below are best practices for reviewing records and documents to determine what needs to be kept and what can be disposed.

Review the [UC Records Retention Schedule](#) and assign a record category to each record. Paper records that need to be kept but are infrequently referenced should be sent to offsite storage. Paper records that need to be kept and are frequently referenced are good candidates for scanning. Due to space constraints, only paper records that needed in paper format should be moved to the new location. Please be sure that records are managed in accordance with [privacy/HIPAA requirements](#).

Step	Activity	Instruction or Resource
1	The records are part of an ongoing public records act request, an audit, investigation, or a foreseeable or on-going litigation	The records cannot be destroyed until all issues are resolved.
2	Determine if the records are the official copies for the University	If not, they might be non-records. If they are non-records and not required for items listed in Step 1, then they may be destroyed. If they contain Personal Information or Restricted Information, they must be shredded.
3	Check the UC records retention schedule and Records Policies	Schedule: http://recordsretention.ucop.edu/ Policies: http://www.ucop.edu/information-technology-services/policies/records-management-policies.html
4	Administrative Records Relating to Research: Retention and Disposition Requirements	http://www.ucop.edu/research-policy-analysis-coordination/files/retention_disposition_2015-update.pdf
5	Retention period has lapsed and there are no ongoing needs for the records	Destroy the records. If they contain Personal Information or Restricted Information, have them shredded.
6	Retention period has lapsed and there are ongoing needs for the records	Contact Brenda Gee to discuss your situation.
7	Retention period has not lapsed	Do not destroy the records. Be sure the records are properly identified. This makes it easier for to determine when the records are eligible for destruction.
8	Retention period is permanent, subject to UCSF Archives review.	Coordinate the transfer of these records to the UCSF Archivist when no longer needed by unit. Polina.Ilieva@ucsf.edu

Contacts

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