Did you know many times records are unnecessarily kept?

Records that have met their retention requirements can often be purged, scanned or archived. In fact, records should not be retained past their retention period unless they still serve a legal, operational, or historical value to the University.
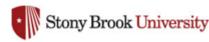
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Records Management

A Basic Guide on Properly Managing and Storing Records at Stony Brook University

Stony Brook University

What is Records Management?

In accordance with Section 57.05 of the NYS Arts and Cultural Affairs Law, **official records** of state-operated campuses of the State University of New York (SUNY) and SUNY System Administration **must be retained and may not be destroyed unless in accordance with applicable records retention schedules.**

What is a record?

A record is defined as: Any recorded information generated in the course of conducting business, and which must be maintained to meet the fiscal, legal, historical, or administrative needs of the organization. Some examples include meeting minutes, employee/student files, and contracts.

Records such as drafts, courtesy copies, etc. may be considered non-records.

Implementing Records Management in your department

Step 1: **Inventory your records.** What types of records are in your possession and where are they located?

Step 2: **Ask yourself: Is your department the "official record custodian"?** Many times only one department is considered the "official custodian" of a record, and other departments keeping a courtesy copy is usually unnecessary.

Step 3: **Identify retention periods.** SUNY's Retention Policy lists various records and specific periods that a campus must retain them, and what records must be kept permanently.

Step 4: **Clean up.** Now that you know which records must stay and which can go, ask yourself these questions:

- Would it be beneficial to scan operation records?
- Where will you store permanent records?
- Are you destroying records in a safe and secure manner?

The Records Management Officer is here to provide guidance so don't get discouraged. Call to set up an appointment today!

What are the benefits?

Having an efficient records management program in place will:

- Improve efficiency and accuracy in locating your records
- Reduce the desire to keep records longer than required
- Assure that proper records are identified, retained and/or archived
- Reduce clutter and free up valuable space
- Protect the University against litigation/adverse court rulings