The Ohio State University Records Management Quick Start Guide

The Ohio State University, as a public institution, must comply with laws governing public records. The Ohio State University Archives (Archives) is responsible for developing and maintaining the records retention policy and schedules for the management and disposition of university records.

Records are information created or received in the course of university business that are maintained as evidence of and/or information about the transaction of that business. Records of upper administrative offices have a unique value to the history of the institution. Many records are significant and should be transferred to the Archives.

The retention periods of records are based on legal statutes, university rules, administrative need, and best practices. Retention periods are the same regardless of format (electronic or paper).

TYPES OF RECORDS	EXAMPLES	EXAMPLE RETENTION PERIOD
Non-record: Those that do not document a function of the university	Personal email message	Delete when no longer needed
Transient Records: A record of short-term—but not a specific period—administrative value	Meeting announcement—whether a paper memorandum or an email[1] message	Destroy after the meeting or when no longer of administrative use
Short Term Record: Records with a specific retention period typically less than ten years	Invoices	4 years, then destroy
Long Term Record: Records with a specific retention period typically ten years or greater	Personnel records	Active + 6 years, then destroy
Permanent Record: Records of enduring administrative or historical value	Meeting minutes	Retain in office 3 years, then transfer to University Archives

Resources for getting started:

- Records Retention Website: http://go.osu.edu/records
- University's Records Retention Policy: http://go.osu.edu/recordspolicy
- University's general records retention schedule: http://go.osu.edu/retention-schedules
- Information about transferring records to Archives: http://go.osu.edu/transfertoarchives
- Certificate of records destruction: http://go.osu.edu/crd

Other resources:

- Archives' staff is willing to visit offices throughout campus to assist with records management. Contact Tamar Chute at chute.6@osu.edu or 292-3271.
- Questions about electronic records and digitization, contact Dan Noonan at noonan.37@osu.edu or 247-2425.
- *Paper and Bytes: Policies, Best Practices, and Resources for Managing OSU Records*: Two hour workshop offered quarterly. http://hr.osu.edu/ohrc/ld_quarterlytraining.aspx [This workshop can be modified for individual units as well.]

---

[1] Email is not a record type or series, but is a means of conveying information. As such, its retention is based upon the informational value of the content of the email message.