

UNIVERSITY ARCHIVES AND RECORDS SERVICE

Schedule Request

Instructions

Please use these instructions to fill out the attached schedule request. If you have further questions, please contact the University Archives and Records Service below.

1. Complete the top portion of form including your contact information and the department and unit name, as applicable. The department number is a number assigned to the department by the university.

As a liaison, you have the primary responsibility of creating and maintaining the unit's records retention schedule. You also work with the University Archives and Records Service to create or revise retention schedules, sign the official retention schedule, and coordinate the transfer of records to the University Archives.

If you have not already completed a records management liaison appointment form, please do so. See <http://www.lib.unc.edu/mss/uars/recforms.html> for forms and instructions.

2. Go through the list of standard record series, checking off the record copies and reference copies you maintain in your office. Please review the descriptions and instructions in the Standard Records Series Descriptions available on the website for assistance with whether to select "record copy", "reference copy" or both for your office.

A record copy is a record held by the office that is the official record keeper of that record for the university. A reference copy is a record that is held by an office for its own reference and is not the official record for the university.

3. Provide detailed information about records your office holds that you do not see on the standard records series list in the section on unique records series.

You may or may not have record series that are unique to your office.

4. Return the form to the University Archives and Records Service to the address below.
5. You will receive an email from the University Archives and Records Service confirming your form's receipt and a timeline for drafting a records retention schedule.
6. In the meantime, complete the records management workshops available online (www.lib.unc.edu/mss/uars/retrain/html) or through the Office of Human Resources' Training & Development Program. Visit <https://s4.its.unc.edu/TrainDev/> for more information.

Please direct questions and send form to:

University Archives and Records Service
Wilson Library
Campus Box 3926
Chapel Hill, NC 27514-8890
Voice: (919) 962-6402 Fax: (919) 962-6401
recman@unc.edu

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