

Getting Started in Managing Your Records

1. Appoint a Records Management Liaison for your unit if you do not have one already; an appointment form is available from the University Archives and Records Service.
2. Have your liaison attend the "Introduction to Records Management" workshop as soon as one is scheduled after being appointed.
3. Complete the 'Step One Scheduling Form' and return it to the University Archives and Records Service within one week; you will get a response within seven days.
4. When received from University Archives and Records Service, complete the more detailed 'Step Two Scheduling Form' by inventorying your unit's records (all types and all locations) and return within one week; again, you will receive a response within seven days.
5. Review the draft retention and disposition schedule that University Archives and Records Service will send you and return it with any changes; again, please try to respond within one week; then, within seven days you will receive an information copy of the final draft schedule being sent to the NC Department of Cultural Resources in Raleigh for their review.
6. Sign-off (both the liaison and the director) on the final schedule forwarded by University Archives and Records Service as soon as the schedule is returned from Raleigh (2-4 weeks); return the signed schedule to University Archives and Records Service for final approval by the University and the NC Department of Cultural Resources; your schedule will be official when the approved schedule is returned from Raleigh.
7. If your unit drops out of the scheduling process for any reason before a signed schedule is completed, the University Archives and Records Service will proceed to create a schedule for your unit and have it approved in Raleigh.
8. Note the week indicated by University Archives and Records Service as the date for your unit's annual records review; this will be noted in the cover letter conveying the signed schedule to you; if a different week would fit your unit better, please notify University Archives and Records Service.
9. Additionally, your liaison and other staff members, as appropriate, should participate in other training offered by University Archives and Records Service. On-site consultations are available, upon request.

UNC-CH University Archives and Records Service

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