Records Management in Four Easy Steps

1. Identify records versus non-records
2. Establish ownership of the records
3. Assign a retention schedule to manage records
4. Dispose of non-records and records that have met retention

Identify records versus non-records

Records (paper or electronic) are created and received doing our work - they are evidence of functions, policies, decisions, procedures, projects, activities, programs, mission, and operations.

Non-records do not document official work functions or responsibilities.

Establish ownership of the records

An **official records holder** (ORH) manages the official record because they created or received the record as part of their job responsibilities.

Program or team project records should be co-managed by developing file structures that provide access to all records and the ORH should be assigned to a staff member on the project.

Assign a retention schedule to manage records

Retention schedules are approved by the Public Records Board and state how long records must be kept and how they can be disposed of. The ORH should determine the appropriate retention schedule to follow to manage each record.

* **General Records Schedules** are used for Business Functions, Administrative Records, School Districts and Public Libraries and Library Systems.

Dispose of non-records and records that have met retention

Non-records can be disposed of when no longer needed.

Records can only be disposed of when:
1) The retention schedule has not expired and there is not an update or revision in progress.
2) The retention period specified in the schedule has been met.
3) There are no pending audit or litigation or open records requests.

Records containing PII must be kept and destroyed securely.

WISCONSIN DEPARTMENT OF Public Instruction

4/4/2025