Is It a Record?

How to Determine Whether a Document is a Record and Associated Disposal Guidelines

Record: must follow retention guidelines before disposal

Non-Record: does not require approval before disposal

Yes

No

No\*

Draft or duplicate?

Represent official action or position of the university?

Supporting document?

Identified as a record on a retention schedule?

Yes

Yes\*

No

Transitory or for reference only?

No

Yes

Yes

Part of contract or agreement, or account of receipt or expenditure of funds?

No

No

Yes

\*A document is a record if there is archival value - ongoing usefulness or significance beyond their immediate business need, based on the administrative, legal, fiscal, evidential, or historical information they contain. An example of a document of archival value is that provides an explanation of the history of the university, a college, unit, or individual.