How to Use the Retention Schedule

We all produce information through our work activities. This information (or 'records') should be efficiently controlled from its creation and use to its disposal (in a practice known as **records management**).

Retention Guidelines

The retention of information produced by the University is subject to various **legal and best practice guidelines** (including Data Protection and Freedom of Information). To comply with these requirements, the University's Records Management team has created a **retention schedule**. The schedule outlines which records you need to keep, how long you need to keep them for, and what you should do with them at the end of their retention period.

The retention schedule applies to records **in any format** (including paper and electronic). However, as we are currently seeking to address the large volume of "legacy" paper records at our campuses in Lampeter, Carmarthen and Swansea, we are particularly concentrating on non-electronic records. Please note: records are listed by **business function** and business activity rather than by department.

Layout of the Retention Schedule

The schedule is divided into **nine subsections** to aid navigation. Within each subsection, the retention schedule is arranged by business function, then business activity. Under each activity, you will find a list of the type of **records** it produces, the length of time (**retention period**) for which these records should be kept, and the **action** to be undertaken at the end of the retention period. **Notes** about any relevant legislation or guidance are also provided.

Records	Retention Period	Citations and Notes	Action

End of the Retention Period

There are three possible actions to be undertaken at the end of the retention period:

- **Archive:** Transfer records to the University Archives. Before sending any material to the University Archives, please contact the Records Management team for advice.
- **Destroy:** Some records can be placed in standard recycling bins. Any records containing personal data must be destroyed confidentially. Legally, we need to be able to prove how and when records were destroyed. Please contact the Records Management team to request a Records Disposal Form where you can record the required information.
- **Review:** Consult with the Records Management team to determine whether the records should be retained for longer or destroyed.

Contact the Records Management Team

If you have any questions about implementing the retention schedule, please contact the Records Management team at records@uwtsd.ac.uk.