

Fact Sheet

Records Cleanup Day



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At times we can feel overwhelmed by the number of emails and other records that daily cross our desks—both physical and virtual. A good way to keep on top of the records overload is to set aside a day at least once a year to clean up your office and put all those records in their proper place.

Choose a day when the office is not busy. Each office will have its own rhythm depending on the work it does. Some offices may be less busy at financial year-end. For others, summer is quieter, or later in the fall once students are back in classes.

It is important to get the support and involvement of the office manager. Staff need to know that they have permission to spend time on this important task.

Goals of a records cleanup day

The goal of a records cleanup day is more than simply tidying up your office. In addition, a records cleanup day:

- ensures compliance with the university's authorized [records retention schedules](#)
- minimizes legal exposure since retaining records longer than required is as much a legal liability as destroying records prematurely
- helps to avoid a privacy breach
- eliminates duplication, frees up space in filing cabinets and on the network
- may reduce your office footprint and reduce storage and maintenance costs
- increases work productivity and efficiency in information search and retrieval

How to prepare

Before the designated records cleanup day:

- Meet with the office manager to review the process involved for the day, and get his or her commitment for resources and any other needed arrangements.
- Create a team of individuals and designate a lead person to coordinate and oversee the activity. If it's your first time, invite the [Records Manager](#) to be part of the team.
- Review the appropriate [records retention schedules](#) and other [guidance](#) from the Records Management and Privacy Office.

Transitory Records

Don't wait for a Records Cleanup Day to dispose of transitory records. Dispose of them regularly. See the Fact Sheet on [Transitory Records](#).

- For [secure shredding](#), order an appropriate number of confidential recycling bins from the University's preferred supplier.
- If records can be sent to the University's [offsite storage](#) at Iron Mountain, follow the procedures for ordering, packing and shipping boxes.
- If records can be sent to the [University Archives](#), consult with the Archives for specific transfer instructions.
- Notify staff about the day and send periodic reminders.
- If necessary, inform the University community of the day/time when your office will be closed or on a reduced service schedule.

What to do on the day

On the designated cleanup day:

- Meet with all staff and provide them with detailed instructions on how to conduct the cleanup.
- Distribute copies of, or direct staff to, the appropriate [records retention schedules](#) and other [guidance](#) on the [Records Management and Privacy Office](#) website.
- Ensure staff review file drawers, filing cabinets, personal and shared drives including Active Directory and OneDrive, and email folders to identify records whose retention periods have expired. Remember to consider records already in storage.
- If records are being moved to [offsite storage](#), make a file list before boxing them up and sending them to storage locations.
- Use the appropriate [forms](#) to list the files to be destroyed or transferred to the University Archives and obtain appropriate sign-off on the disposition of records. Note: You don't need to list or seek authorization to destroy [transitory records](#).

CAUTION:

Never destroy records that pertain to an ongoing or reasonably anticipated investigation, legal action or proceeding, Access to Information request, audit or program review, even if the retention period or disposition date specified for the records has already expired.

Repeat annually

Make this a regular event, held at least once a year. Under the University's [Records Management Policy](#) we are all responsible for ensuring the effective management of university records.



Make it fun!

Make it a dress-down day. Order pizza for lunch. Hold a contest with prizes.

For more ideas, or if you have any questions, contact the Records Management and Privacy Office at recordsmanagement@queensu.ca.