



# WHAT TO DO WITH YOUR RECORDS BEFORE YOU LEAVE THE UNIVERSITY

## **This guide is aimed at all academic and professional services staff**

Records, including teaching materials, and emails created in the course of your employment, are the property of the University. Before you leave you are responsible for organising the records which are in your care, in consultation with your line manager or local Records Coordinator.

### **What records do you have in your care?**

- They could be in paper, electronic, memory stick, email, CD etc., on your personal drive, shared drive, laptop, web, on your desk, in your office, off site in storage or elsewhere
  - All of these should be considered
- Are you named (by job title) on a Records Retention Schedule?
  - Your successor or line manager should take control of these records
- Are you the secretary of a committee or meeting?
  - Your successor or line manager should take control of these records
- Are the records copies or originals?
  - It may be that copies can be disposed of. Refer to guidance.

### **What action should you take?**

#### **Electronic records**

- Delete electronic records if in line with your line manager you have identified them as no longer needed; if not transfer them to an appropriate colleague; this includes emails
- Any document passwords should be passed on with the relevant password
- Take special care with records containing personal data, confidential, sensitive, commercial or financial data; these should be handed over securely if not deleted
- Delete your own personal data and data set up for your own use only

### **What records should you keep or dispose of?**

- Records listed on Records Retention Schedules should be kept for the length of time specified on the schedule.
- In deciding, think about whether somebody need to refer to the record again in the future.
- In discussion with your line manager, consider disposing of legacy records, the contents of which are unknown (and which would be too time-consuming to review), and which are never referred to.

Then:

- Transfer remaining records to your successor or a colleague in agreement with your line manager.
- Consider preparing a list of records for your successor or an appropriate colleague, including hard and soft copy, and their location.

### **More Guidance: Useful links**

- [Retention of Corporate Records, Financial Records, Health & Safety Records, Personnel Records](#)
- [Good Practice Note 9 – Staff Exit Process](#)
- [Good Practice Note 6 – Retention & Disposal of Records](#)