



Tips for a Successful Office Cleanup

Plan ahead

- Contact the **Information and Records Management Program at 5-6499** at least a week prior to your clean up for personalized assistance in planning your project.
- Review Harvard's information and records management policies and tools at <http://hul.harvard.edu/rmo/policies.shtml>

Be aware of Harvard's policies about retaining and disposing of records

- Harvard has official policies on how long you must keep different kinds of records and their disposition, known as the General Records Schedule (**GRS**). Download the GRS **prior** to June 29 from <http://grs.harvard.edu>.
- Identify the kinds of records in your office and follow the retention guidelines in the GRS.
- Common records and their retention periods are listed on the reverse side of this handout.
- If you are cleaning up your electronic files or your email, be aware that the GRS applies to records in electronic formats too.
- For help interpreting the GRS, call **5-6499**.

Destroying records

- Shred records containing confidential information (financial, personal, sensitive).
- Call OSS at **5-6380** to arrange shredding services.
- Do not destroy any records pertaining to an investigation, legal action or proceeding, litigation, audit, or program review in progress or if you know that one is about to be held. This is so even if the retention period or disposition date specified for the records has already expired.
- Document records destroyed, recording the type of records and their dates.

Storage options

- Off-site storage is available for office records that must be retained but are not frequently used. Call Melissa Murphy at **6-6364** for information and instructions.

Permanent (archival) records

- For records with permanent retention periods or of historical value, contact Laura Peimer, Archivist, at **5-3688** to arrange for their transfer to Historical Collections.

Post clean-up assessment

- If your clean up inspires you to reorganize your files for improved access and management, call the Information and Records Management Program for professional assistance in designing a recordkeeping system.

Remember, when in doubt, DON'T throw it out!

Information management guidance is available

The Information and Records Management Program can help with all issues and questions relating to information and records management. Contact **Liz Copenhagen**, Information Life Cycle Manager at **5-6499** or ecopenhagen@hbs.edu



Common Records and their Retention Periods

The following are common records and their retention periods. Following each item is its General Records Schedule citation number (<http://grs.harvard.edu>). Contact the Information and Records Management Program at **5-6499** for records not on the list or for questions.

*Note: for records with a retention period of archives review or permanent contact Laura Peimer at **5-3688** *

Financial records

- Accounts payable records (GRS 0410) – retain 4 years (non-sponsored accounts) or 6 years (sponsored accounts), then destroy
- Cash records (GRS 0420) – retain for 4 years (non-sponsored accounts) or 6 years (sponsored accounts), then destroy
- Journal records (GRS 0460) – retain for 4 years (non-sponsored accounts) or 6 years (sponsored accounts), then destroy
- Fiscal audit records (GRS 0525) – archives review after 5 years
- Payroll records (GRS 0560) – retain 6 years after employee leaves, then destroy

Human resource records

- Personnel records (GRS 0675) – retain 6 years after employee leaves, then destroy
- Faculty personnel records (GRS 0705) – permanent retention for junior and senior faculty
- Search records (GRS 0765) – retain for 3 years after the end of the search, then destroy

Committee records

- Standing committee records (GRS 1027) – permanent
- All other committee records (GRS 1032, 1035) – archives review after 5 years

Program and project records

- Program planning and management records (GRS 1120, 1125, 1130, 1135, 1150) – archives review after 5 years
- Executive correspondence (GRS 1050) – archives review after 5 years
- Special project records (GRS 1175) – archives review after 5 years

Special events, conferences and programs records

- Special event, conference, and program records (GRS 1820, 1825, 1850) – archives review after 5 years

Academic program and student records

- Academic program administration records (GRS 3100) – permanent
- Curriculum development and review records (GRS 3160) – archives review after 5 years
- Course records (GRS 3157) – archives review after 5 years
- Graduate student records (GRS 4150) – permanent

Faculty records

- Faculty biographical records (GRS 3320) – permanent
- Faculty personal and professional papers (GRS 3380) – archives review after 5 years

Remember to shred confidential and sensitive records