Records Clean-up Day

A good way to ensure ongoing organization and disposition of records is to choose an annual records clean-up day for your office.

When? Each office has its own yearly cycle; choose a day/period when the office is not too busy. Some offices may choose financial year end, while others may decide to organize records after convocation or before the intake of students in September.

Who? In order to be successful, all employees should attend. Administrators may decide to provide incentives, such as making records clean-up day a casual day, or ordering a pizza lunch.

To Do Before the Day

1. **Inform the Records Manager**, once you have chosen your records clean-up day, for guidance and assistance.
2. **Decide on responsibilities:** Who will do what? Choose one person to oversee activities.
3. **Estimate supplies**: Decide how many bankers boxes will be needed, and order them in advance.
4. **Make arrangements for shredding**.
5. **Remind staff** periodically, to ensure they will attend. Direct them to this manual for guidance and recordkeeping best practices.
6. **Notify others** if your office will be closed or have a limited capacity during cleanup.

To Do On the Day

Meet in the morning to confirm responsibilities, records retention schedules and goals. Then clean up records.

1. **Box/shred** paper files slated for destruction.
2. **Transfer records to semi-active storage** and update semi-active storage inventory.
3. **Transfer records to the Archives**.
4. Ensure **active files** are well-organized and do any necessary clean-up.
5. Ensure **e-mail** is organized and disposed in a timely fashion.
6. Destroy **electronic files** slated for destruction and ensure they are well-organized and maintained.
7. Fill out any **paperwork** for destruction or archival transfer. See section on disposition for more guidance.

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