**Records Management Workflow for Closing Work Units**

Records & Information

Use this workflow to determine how to meet your records management responsibilities when your work unit closes. Contact Records & Information if you require further assistance: records-info@unimelb.edu.au.

**Hand over to originating unit for filing.**

**If already filed, destroy.**

**File appropriately – retain for period required by RDA and business need.**

**File original appropriately – retain for period required by RDA and business need. Copies may be destroyed under NAP.**

**File one copy appropriately – retain for period required by RDA and business need. Other copies may be destroyed under NAP.**

**File appropriately – retain for period required by RDA and business need.**

**Retain until no longer required for business use, then destroy under NAP.**

**Destroy under NAP.**

**START HERE**

**Ensure the business unit does not leave records in drawers, shelves, boxes, and storerooms before the unit ceases to operate**

**Complete the** [**Records Handover for Staff Leaving or Relocating Template**](https://records.unimelb.edu.au/guides/disposal_advice/staff_who_are_leaving/?a=3546996) **and conduct a meeting with the new responsible area(s)**

**Using the** [**University Records RDA**](https://records.unimelb.edu.au/services/disposal_advice/rda)**, identify records to be kept permanently. Contact Records & Information and refer to** [**Transfer of permanent records**](https://records.unimelb.edu.au/guides/disposal_advice/transfer-of-permanent-records) **web page**

**Records which are not yet time-expired, should be given to the new responsible area to be retained and stored, or placed into secondary storage. See** [**Storage of temporary records**](https://records.unimelb.edu.au/guides/disposal_advice/storage-of-temporary-records) **web page.**

**Ensure records related to core activities are returned to the responsible area(s)**

**Identify records within the work unit that need to be transferred or destroyed**

**Remove all personal (not work related) records and items**

**Delete material which comes under Normal Administrative Practice (NAP). See** [**Retention and disposal**](https://records.unimelb.edu.au/guides/disposal_advice) **web page**

**Using the** [**University Records RDA**](https://records.unimelb.edu.au/services/disposal_advice/rda)**, identify records which need to be kept for a temporary period**

**Time-expired records can be prepared for destruction. See** [**Destruction of temporary records**](https://records.unimelb.edu.au/guides/disposal_advice/destruction-of-temporary-records) **web page.**

**You have completed your records management responsibilities**

**START HERE**