Records & Information Template

Records Management Checklist for Staff Leaving or Relocating

This checklist should be completed prior to your last week in your current role. It outlines the steps to take to file, destroy or transfer the information you have been responsible for and will ensure that important information remains accessible to other staff once you leave or move.

|  |
| --- |
| Remember that the documents you have created and/or received as part of your duties are University records. |

## Task checklist

|  |  |  |
| --- | --- | --- |
| **Step no.** | **Task** | **Completed** |
| 1 | Move all your business records, including email into your work unit’s relevant systems and storage areas, e.g. Records Managed SharePoint, Content Manager or shared drive, and/or transfer your business records to colleagues. |  |
| 2 | Transfer University information stored on your personal computer, laptop or mobile device to a University environment (Records Managed SharePoint, Content Manager, shared drive, etc.) |  |
| 3 | Delete any records which come under Normal Administrative Practice (NAP) i.e. reference copies, drafts, working copies, material available elsewhere.  See the [Retention and Disposal](https://records.unimelb.edu.au/guides/disposal_advice) web page for guidance about NAP |  |
| 4 | Remove all personal hardcopy and digital documents and other personal items such as photographs, staff birthday lists etc. |  |
| 5 | Return all borrowed hardcopy records/files to Records & Information |  |
| 6 | If you are a Content Manager user, notify Records & Information that you are leaving by sending an email to: [records-info@unimelb.edu.au](mailto:records-info@unimelb.edu.au) |  |
| 7 | Identify current business records that will be required by your work unit. Advise your supervisor of the location or use the [Records Handover Information Sheet](https://records.unimelb.edu.au/__data/assets/word_doc/0006/3546996/RITemplate-RecordsHandoverForStaffLeavingOrRelocatingV2.1.docx) |  |
| 8 | Using the [University Records Retention and Disposal Authority](https://records.unimelb.edu.au/services/disposal_advice/rda) (RDA), identify which of your business records are temporary records, i.e. need to be kept for a period of time before they can be lawfully destroyed.   * Time-expired records can be put aside for destruction. See the [Destruction of temporary records](https://records.unimelb.edu.au/guides/disposal_advice/destruction-of-temporary-records) web page for guidance. * Records which still need to be retained, can be stored locally in the work unit or in secondary storage. See the [Storage of temporary records](https://records.unimelb.edu.au/guides/disposal_advice/storage-of-temporary-records) web page for guidance. |  |
| 9 | Using the [University Records RDA](https://records.unimelb.edu.au/services/disposal_advice/rda), identify which of your business records are permanent and need to be transferred to Records & Information. See the [Transfer of permanent records](https://records.unimelb.edu.au/guides/disposal_advice/transfer-of-permanent-records) web page for guidance. |  |
| 10 | Complete [Records Handover Information Sheet](https://records.unimelb.edu.au/__data/assets/word_doc/0006/3546996/RITemplate-RecordsHandoverForStaffLeavingOrRelocatingV2.1.docx) a week before you leave |  |