

UWS -UW-Madison General Records Schedule for Business Communications Records



Record Series ID Number	Record Series Title	Record Series Description	Retention	Media Type	Disposition	Office of Record
UWBC0001	<p><u>BUSINESS COMMUNICATIONS:</u> <u>ROUTINE</u></p> <p>Routine communication has continuing value as a public record, because it is directly connected to the transaction of public business that is conducted by university employees. Routine communication comprises the normal communication that occurs when university employees, and sometimes their colleagues who are not university employees, work together to transact public business on behalf of the University of Wisconsin System.</p> <p>Routine communication has no historical value; never includes records that set forth university policies, guidelines, procedures, or directives; and does not formalize the business processes of the University of Wisconsin System.</p>	<p>Routine communication can be memorialized using many different types of business tools, and it includes but is not limited to communication that:</p> <p>(1) Allows university employees, and sometimes non-employees, who are in different physical locations to discuss and perform routine aspects of business activities or projects on behalf of the University of Wisconsin System;</p> <p>(2) Records routine aspects of the decision-making process that occurred between colleagues during the lifecycle of a business activity or project;</p> <p>(3) Assists employees in administering routine facets of a university activity or business project; or</p> <p>(4) Allows employees to disseminate to their colleagues routine, substantive materials that are related to a university activity or business project.</p>	<p>Retention: EVT + 6 Months EVENT= Business Activity or Project is completed</p> <p>Copies: Destroy when no longer needed, but no longer than originals</p> <p>Confidential or PII: None</p>	Electronic	Delete	<p>Campus wide</p> <p>Applies to all Units and Departments</p>

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UWBC0002	<p><u>BUSINESS COMMUNICATIONS: TRANSITORY</u></p> <p>Transitory communication is directly connected to the transaction of public business that is conducted by university employees, but it has a short-term business value.</p> <p>Transitory communication has no business value after the information contained in the message has been conveyed or superseded, or the event to which the message is related has occurred. Transitory communication does not establish policies, guidelines, or procedures; certify a transaction; become a receipt; nor perpetuate or formalize business activities of the University of Wisconsin System. Transitory communication is not necessary for statutory, legal, or fiscal purposes; has no historical value; would not be filed in a records management system; and should be destroyed after one week, or when obsolete because the communication has been superseded or the related event has transpired.</p>	<p>Transitory communication can be memorialized using many different types of business tools, and examples include but are not limited to:</p> <p>(1)Messages that communicate information that is not the basis for official action, such as news bulletins, holiday notices, charity and welfare appeals, or information about workplace events.</p> <p>(2)Scheduling information pertaining to an event that has already occurred.</p> <p>(3)Courtesy copies of communications that convey information but do not require responsive action by the University employee who is the recipient, but not the creator, of the communication.</p> <p>(4)Communication that is created by, or received from, a distribution list, listserv, or other resource provider for reference purposes.</p> <p>(5)A preliminary version of a document that has been shared for review and comment among colleagues after it has been superseded by a successive version of the document. Preliminary versions of a record may be classified as transitory only by the recipient, but not the</p>	<p>Retention:</p> <p>EVT + 7 Days</p> <p>EVENT= Communication has been superseded or the related event has transpired.</p> <p>Copies: Destroy when no longer needed, but no longer than originals</p> <p>Confidential or PII: None</p>	Electronic	Destroy	<p>Campus wide</p> <p>Applies to all Units and Departments</p>

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		<p>creator, of the communication.</p> <p>(6)Transitory requests for information or materials to which a university employee can easily reply, and in response to which a university employee would not have to perform special research, engage administrative processes, or seek supervisory review</p>				