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Subject: UW- Madison Records Management News - Spring 2017
Date: Thursday, March 30, 2017 1:39:33 PM
Attachments: [image005.png](#)

April Is Records and Information Management Month!!!

April is here so just a reminder that there are many resources for university employees to reference to assist them with the management of their university records and information.

These resources can be found on the [UW-Madison Records Management website](#).

1. Records Management File Plans.

There are several new power points presentations, including the creation of a Records Management File Plan. How can a file plan assist your department? I recommend that all university dept. /unit create one.

- A “file plan” is a well thought out plan in how records are managed.
- File Plans specify how records are to organized once they have been created and maintained through the records lifecycle.
- File plans are used in training new employees in how records are managed
- Assists in identifying records consistently
- Assists in location and retrieving records quickly
- Disposing of records no longer needed
- Meeting legal and organizational requirements
- Provides transparency of how records are managed

A Records File Plan is a document that provides **transparency** in the management of university records. It is recommended that all departments and units develop a file plan to documents their records management processes and where and how information is managed and stored.

- [2017 Records; File Plans; and Retention-Creating a Roadmap to Success- slides](#)
- [2016 Job-Aid for University File Plans](#)
- [2016 File plan form](#) [Word format] for use by department or units

2. Other Guidance and Training from the website. (see [Records Management Training Resources for University Offices](#))

Guidelines: See also [Records Management Policy and Guidance](#)

- 2014 **UW-Madison** [Employee Responsibility for University Records](#)[pdf]
- 2016 **UW-Madison** [Records Management Guide for Departing Employees](#) [pdf]
- 2016 [UWSA Procedure 399.1 Storage of Supporting Documentation for Financial Transactions.](#)
- 2016 **UW-Madison** [Managing Electronic Records in Information Systems: Shared Drives: Content](#)

Management Sys.; Doc Management Sys; Collab Tools and other Electronic Inf. Systems [pdf]

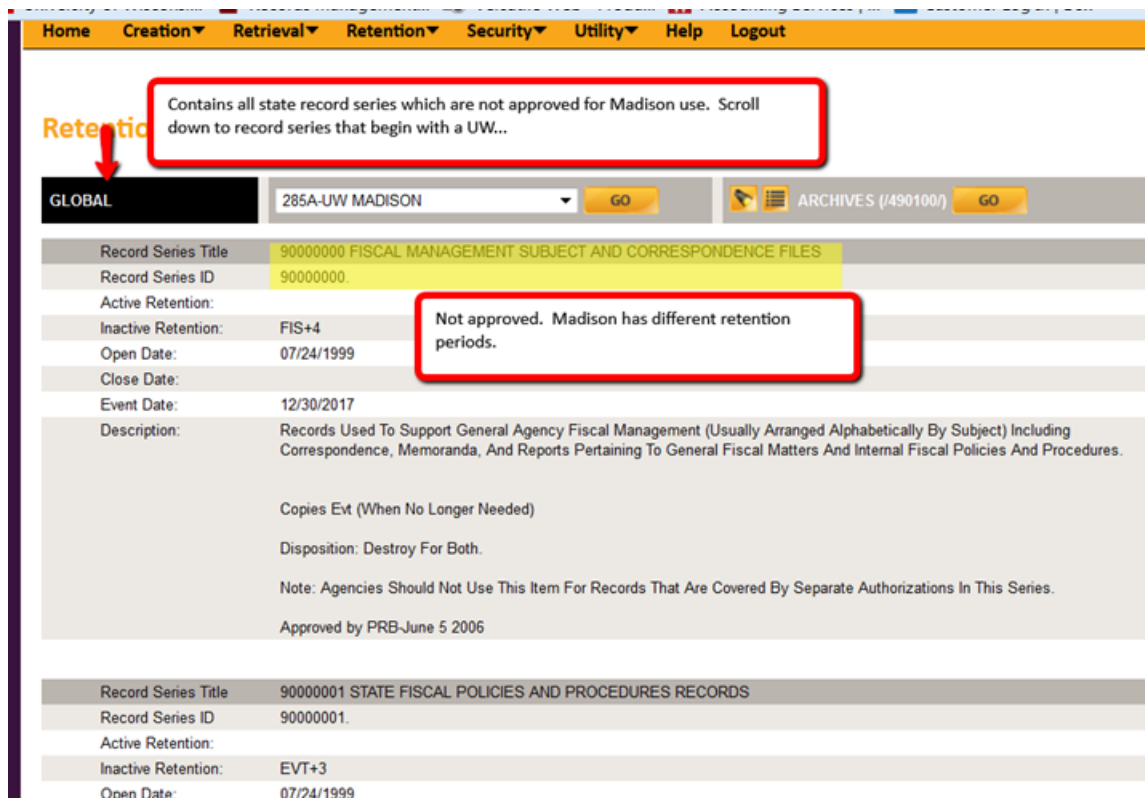
- 2014 **UW-Madison** [Electronic Business Communication and University Records](#) (Business Communications including e-mail)[pdf]
- 2014 **UW-Madison** [Guidelines for Document Imaging and University Records](#)[pdf]
- [UWSA- Records Management Guidelines for Information Technology Systems](#)
- [UWSA-Records Management: Best Business Practices](#)

Training Videos:

- 2017 [Introduction to University Records Management](#)– YouTube Video 11:25 min. *NEW*
- 2017 [Retention and Disposition of Records](#) – YouTube Video 8:42 min *NEW*
- 2016 [Organization and Management of Shared Drives](#) – YouTube Video 9:32 min
- 2013 [Introduction to Records Management](#) You Tube Video 6:03 min
- 2013 Need help organizing your e-mail? [E-Mail Organization for Records Management and Compliance](#). YouTube Video 11:20 min
- 2013 Thinking about Imaging University Records? [Digitizing Documents: Is It Right for You?](#) YouTube Video 6:25 min [Handout for Document Imaging](#) [pdf]

3. Using the State Records Center and Correct Record Series

After the last disposition cycle, I had to hold numerous boxes because they had been placed under the incorrect record series. **Please note that when using Versatile under the Global tab that this section contains the entire states record series not just Madison.** Before Logging into Versatile, check the appropriate [university record schedule](#) to find the correct record series number. Once you have the record series, log into Versatile. Under the Global Tab, scroll down to the record series until you get to the series that begin with UW.



Home Creation Retrieval Retention Security Utility Help Logout

Retention

Contains all state record series which are not approved for Madison use. Scroll down to record series that begin with a UW...

GLOBAL 285A-UW MADISON GO ARCHIVES (/490100/) GO

Record Series Title	90000000 FISCAL MANAGEMENT SUBJECT AND CORRESPONDENCE FILES
Record Series ID	90000000.
Active Retention:	
Inactive Retention:	FIS+4
Open Date:	07/24/1999
Close Date:	
Event Date:	12/30/2017
Description:	Records Used To Support General Agency Fiscal Management (Usually Arranged Alphabetically By Subject) Including Correspondence, Memoranda, And Reports Pertaining To General Fiscal Matters And Internal Fiscal Policies And Procedures.
Copies Ext (When No Longer Needed)	
Disposition: Destroy For Both.	
Note: Agencies Should Not Use This Item For Records That Are Covered By Separate Authorizations In This Series.	
Approved by PRB-June 5 2006	

Record Series Title	90000001 STATE FISCAL POLICIES AND PROCEDURES RECORDS
Record Series ID	90000001.
Active Retention:	
Inactive Retention:	EVT+3
Open Date:	07/24/1999

NOTE: For all UW-Madison approved records schedule check the University General Records

schedules first before going into Versatile.

Records Management: Preserving yesterday, managing today, preparing for tomorrow.

If you have questions, please contact me.

Peg

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Come visit us at UW-Madison Records Management <http://www.library.wisc.edu/archives/records-management/>

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