Welcome to the Basic Records Management training, which is offered by DTMB - Records Management Services.
This training provides an overview of the basic information that every Michigan government employee needs to know about records management. Topics to be discussed include Michigan laws related to records management, the different types of records, records Retention and Disposal Schedules, preservation of historical records, and additional resources that are available about records management topics.
Learning Objectives

• To understand
  • What a record is
  • Which records need to be kept
  • What a Retention and Disposal Schedule is
  • How schedules help agencies manage their records

The objectives of this class are for employees to understand what a record is, which records need to be kept, what a Retention and Disposal Schedule is, and how schedules help agencies manage their records.
Poll: What words do you think of when you hear the phrase "records management"?
Michigan’s archives and records management programs were originally established in 1913 with the passage of the Historical Commission Act. This act created the Archives of Michigan, and established it as the official repository for preserving historically valuable Michigan government records. It also established that public records were the property of the people of Michigan.

Fast forward several years, and the State of Michigan created what was called the “Little Hoover Commission,” to investigate ways to improve the efficiency of Michigan government. A task force of the commission was assigned the responsibility of determining whether the State should establish a records management program. The task force was about to issue its recommendations to create a records management program when in 1951 there was a state office building fire.

In 1952 the Michigan Legislature passed the first records management legislation. In 1954 the State Records Center opened for storing inactive records. The Records Center moved to its current location in 2008.

The Archives of Michigan is now an agency within the Department of Natural Resources, and the Records Management Services is an agency within the Department of Technology, Management and Budget.
In 1951 there was one state office building that all state employees in Lansing worked in. An employee of the Department of Highways (now MDOT) feared he was going to be drafted to serve in the Korean War. He thought that if he committed a misdemeanor crime he could avoid the draft. So, he dumped the ashes from his pipe into his wastebasket and went to lunch. It was a freezing cold February and the fire burned for 3 days. Firefighters from surrounding communities came to Lansing to help fight the fire, but water was freezing before it got into the building.

15 firefighters were injured fighting the fire, and more than 8000 cubic feet of records and books were destroyed. The damages cost $3 million. The individual who set the fire was caught and was sent to Jackson Prison. However, it was determined that he was married, and his wife was pregnant at the time--factors that would have allowed him to avoid the draft. Meanwhile state government was having serious problems, because its primary office building and records were destroyed.

The State Office Building is still in use today. It is now named the Lewis Cass Building. However, it is one floor shorter than it was prior to the fire. The Michigan Legislature responded quickly to the disaster and the task force report.
Records Management Services (RMS)

- Retention and Disposal Schedule development, review and approval
- Recordkeeping system consulting
- Imaging and document management services
- Education and training
- Records storage services

RMS is responsible for the development, review and approval of records Retention and Disposal Schedules. RMS also provides recordkeeping system consulting, imaging and document management services, education and training—like this class, and records storage services.
Each department has a Records Management Officer (RMO) who is appointed by the department’s director. RMOs are responsible for coordinating records management activities for their department, and they are the first person who should be contacted when an agency has a question or needs assistance. A list of the RMOs is available online on InsideMichigan (see the end of this training for instructions to access the website).
There are certain principles that records managers follow. First, if information is recorded on any medium, it is a record.

Public records are evidence of the activities of government.

Destruction of records must be authorized by an approved records Retention and Disposal Schedule.

Records need to remain accessible and usable for their entire retention period. Storing records on a floppy disk that no longer works with your computer is not fulfilling your requirements for record retention.

All records that document an activity should be stored together, so you only have to look one place to find the document you need or the answer to your question.

Finally, every employee who creates, receives, or maintains records has a responsibility for records retention.
There are several Michigan laws that address records management.

The first is the Freedom of Information Act (or FOIA), which contains a definition of public records. There are actually multiple definitions of “public records” in Michigan law. They are all complimentary and don’t contradict each other, but the FOIA definition is the one that is cited most frequently. We will look at this definition in a few minutes.

Next is the Management and Budget Act, which prescribed the responsibilities of the Records Management Services, as well as the responsibilities of all state employees to manage records.

Next is the Michigan History Center Act, which states that public records can only be destroyed with the authorization of an approved Retention and Disposal Schedule.

The Michigan Penal Code establishes misdemeanor penalties, including fines and jail time, for destroying a public record without the authorization of an approved schedule.

Finally, the Records Reproduction Act regulates the reproduction of records into different formats.

All of these laws are available from the Michigan Legislature’s website, www.legislature.mi.gov.
What is a Record?

Let’s start by defining what is a record.
According to the State of Michigan’s Administrative Guide Procedure 0910.01, the word “Record” means recorded information in physical or electronic formats, made or received by a Michigan government agency or employee. Records document the performance of government business, and serve as evidence of the organization, functions, policies, decisions, procedures, operations, or other activities.

Michigan’s Freedom of Information Act (FOIA) defines a Public Record as “A writing prepared, owned, used, in the possession of, or retained by a public body in the performance of an official function, from the time it is created.”

Basically, if the information is recorded on any medium, and if it documents the work that you do as a government employee it is a record.
There are many types of records. Examples include case files, applications, licenses, complaints, contracts, correspondence, financial documents, data, reports, and more.

| Case Files | Correspondence |
| Applications | Written communications |
| Licenses | Visual communications |
| Complaints | Audio communications |
| Contracts | Policies and Procedures |
| Maps | Meeting Notes |
| Design Drawings/Plans | Meeting Appointments |
| Financial Statements | Newsletters |
| Receipts | Census Data |
| Reports | Lab Test Results |
Records can take the form of...

- Paper
- Microfilm
- Word Documents
- Excel Spreadsheets
- Visio Diagrams
- Databases
- Photographs (print and digital)
- Digital Images
- Voice Mail
- Audio Recordings
- Video Recordings
- Instant Messages
- Text Messages
- E-mail Messages
- Sticky Notes
- Social Media Postings
- PowerPoint Presentations

Records can be maintained in a wide variety of formats, including paper, microfilm, electronic documents, databases, digital images, audio and video recordings, email, text messages, social media postings, and more.
There are some records we need to keep, such as records that document official functions. And there are some records we don’t need to keep, such as transitory records, non-record materials and personal records. We will discuss each of these types separately.
The first category we will discuss is Official Records. Michigan’s Freedom of Information Act (FOIA) defines an official record as recorded information that is “prepared, owned, used, in the possession of, or retained by a public body in the performance of an official function.”
Retention of official records is governed by Retention and Disposal Schedules, both general and agency-specific.

Official records document the activities of the agency, and how employees perform their jobs. Supervisors should decide where official records are stored, and should promote consistent recordkeeping practices, so everyone in the office can access the records they need to do their jobs.
Examples of official records include directions to change the language of a contract, answers to questions, decisions about personnel issues, and notices of appointments to a committee, including a list of responsibilities.
Creating Work Records with Personal Resources

- Government business conducted using personal resources creates public records
  - Personal email account
  - Social media tools (such as Facebook or Twitter)
  - Personal cell phones
  - Home computer
- Subject to Retention and Disposal Schedules, as well as FOIA or litigation
- Executive Directive 2019-05 prohibits the use of private email for the conduct of state business

If you conduct government business using personal resources, the records that are created may be government records. If so, they are subject to Retention and Disposal Schedules, as well as FOIA and litigation. Personal resources include personal email accounts, social media tools (such as Facebook or Twitter), personal cell phones, home computers, etc. Executive Directive 2019-05 prohibits the use of private email for the conduct of state business.
Records relating to agency activities that have temporary value and do not need to be retained once their intended purpose has been fulfilled.

Source: General Schedule 5.00

Transitory records document work activities, but they have little value once the activity is completed and should be destroyed. For state employees, their retention is governed by General Schedule #5.00.
Transitory Records

- Can be disposed of when activity is completed (GS #5.00)
- Examples:
  - Requests or reminders to do a routine task
  - Simple inquiries about policies, office location and hours, etc.
  - Information that is published somewhere, like the internet or a procedure manual
  - Temporary documents that are replaced by other records that serve as evidence of the activity

Transitory records can be disposed of when the activity is completed. Transitory records include requests or reminders to do a routine task, simple inquiries about policies, office location and hours, information that is published somewhere, like the internet or a procedure manual, and temporary documents that are replaced by other records that serve as evidence of the activity.
Examples of transitory records include notices about meetings (remember, calendars are records), requests for supplies (note that a purchase order will be created as evidence of the purchase), requests for copies of documents, etc.
Non-records

Recorded information in the possession of an agency that is not needed to document the performance of an official function.

Source: General Schedule #1

Non-record materials are recorded information in the possession of an agency that is not needed to document the performance of an official function. They are defined by General Schedule #1.
**Non-records**

- Can be disposed of when they are no longer needed for reference purposes (GS #1)
- Examples:
  - Publications received from outside sources
  - Mass mailings, notices, flyers, advertisements, spam, junk mail
  - Drafts that are replaced by new or final versions
  - Duplicates
    - Agencies can decide which format to use for retaining their records, if records exist in multiple formats
    - If multiple offices possess the same record, they should communicate with each other about who is responsible for record retention

Per General Schedule #1, non-records can be disposed of when they are no longer needed for reference purposes. Non-record materials include brochures, newsletters and publications received from outside sources, mass mailings received for informational purposes, advertisements, spam and junk mail, drafts that are replaced by newer or final versions, and duplicates. If records exist in multiple formats (such as paper and electronic), agencies can decide which format to use for retaining their records, they don’t have to keep both. If multiple offices possess the same record, they should communicate with each other about who is responsible for record retention, so they don’t keep duplicates.
Examples of non-records include blood drive notices, communications from professional associations, informational correspondence, etc.
Personal Records

Records that document non-government business or activities.

Personal records document non-government activities.
Personal Records

• Document your personal life
  • Employee benefits
  • Personal financial accounts
  • Social events with co-workers and friends, etc.
  • Personal purchases and shopping
• Store personal records so they are physically separated from government records
• Personal records should not be created and stored using government resources
  • Executive Directive 2019-05 directs that “state email must not be used for non-state activity”

Personal records document your personal life, including employee benefits, personal financial accounts, health, family, social events with co-workers and friends, personal purchases and shopping, photos, videos, music, etc. They should be stored separately from government records, using non-government resources. Executive Directive 2019-05 directs that “state email must not be used for non-state activity.”
Examples of personal records that might be created at work include parking information, office party notices, congratulations, etc.
In summary, records are not equal. Now that we know what records we need to file, we will look at long we need to keep them.
Schedules are the foundation of records management, because all other decisions about how to manage records depend in part upon how long the records are kept.
Retention and Disposal Schedules

- List official records created and maintained by an agency
- Define the retention periods for records
- Provide the only legal authorization for destruction
  - Internal policies cannot legally authorize destruction of records
- Should reflect current organization structure and business processes

Schedules list the records series that are created and maintained by an agency. They define the retention periods for records, and they authorize the destruction of records. Internal policies cannot legally authorize the destruction of records, only an approved schedule can. Records not listed on a schedule are by default permanent, because there is no authorization to destroy them.

Schedules need to reflect current organization structures and business processes of each agency, so the schedule is accurate and useful. Government agencies are frequently renamed, split and merged, so it is important to revise schedules to reflect these changes.
Format Does Not Matter

- Schedules apply to all records in all formats
  - Paper, email, data, photos, maps, digital images, word processed documents, etc.
- Schedules apply regardless of where the records are stored
  - File cabinets, cubicles, shared drives, email accounts, Records Center boxes, databases, imaging systems, cloud, closets, etc.

Schedules must cover all records, in all formats, including email, digital images, data, photos and electronic documents.

Schedules apply regardless of where the records are stored, including file cabinets, cubicles, shared drives, email accounts, Records Center boxes, databases, imaging systems, cloud storage, closets, etc.
Schedule Approval Process

• Approved schedules are legal documents
• Schedules are approved by:
  • Agency representative
  • Records Management Services
  • Archives of Michigan
  • Attorney General
  • Auditor General
  • State Administrative Board

All schedules are reviewed and approved by an agency representative (who is usually the division director), by Records Management Services, the Archives of Michigan, Attorney General (for state government only), Auditor General (also state government only) and the State Administrative Board. The State Administrative Board is the final approving entity on the document, so their approval date is the effective legal date of the document.
How does the State of Michigan determine what is the appropriate retention period for a record?

First, we look at the record’s administrative value to determine how long the agency needs the record to support its daily work activities.

Next, we look at the record’s fiscal value to determine how long it is needed to close financial accounts and support auditing.

Next, we look at the record’s legal value to ensure that records are kept as long as they are needed as evidence to document compliance with legal requirements. There are a lot of state and federal laws that tell us we have to create records. Rarely, do they tell us how long to keep the records after they are created. However, laws need to be consulted to determine if they define a retention period for various records.

Finally, we look at whether the record should be preserved permanently to document the history of the State of Michigan. Then we set a retention period for when all of these values cease to exist.
An excerpt of the Retention and Disposal Schedule for Records Management Services is displayed on the screen.

### Retention Period

**RETAIN UNTIL:** a defined trigger
**PLUS:** additional time
**THEN:** Destroy or Transfer to the Archives

**Reading Schedules**

In 2017 RMS re-formatted the Retention and Disposal Schedules to make them easier to read and follow. The retention period contains narrative language that defines how long the record is kept, and whether it should be destroyed or transferred to the Archives of Michigan for permanent preservation.
There are two types of schedules that are used in Michigan: general schedules and agency-specific schedules. All offices need to use both types of schedules, because they supplement each other.
General Schedules cover records that are common to a particular function or type of agency.

- They reduce duplication of effort. By covering a record series once on a general schedule, we don’t have to list it on each agency’s specific schedule. Public records not listed on a general schedule must be listed on an agency-specific schedule.
- They promote consistent retention practices. So for example, everyone who has FOIA requests keeps them for the same 1 year retention period.
- General schedules do not mandate that records be created; they simply establish a retention period, in case the records are created.
- General schedules do not specify the format of the record. Some offices could keep the records in paper, and others could use digital imaging, and this is acceptable.
- General schedules are published on InsideMichigan (see the end of this training for instructions to access the website).
<table>
<thead>
<tr>
<th>General Schedules</th>
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<tr>
<td>• <strong>General Schedule 1 - Non-Records</strong></td>
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<td>• <strong>General Schedule 5 - Administrative Records</strong></td>
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<td>• <strong>General Schedule 6 - Accounting And Purchasing</strong></td>
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<td>• <strong>General Schedule 9 - Technology Systems Records</strong></td>
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<td>• <strong>General Schedule 10 - Procurement Records</strong></td>
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</tbody>
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This is a list of the general schedules that are approved for use by the Executive Branch.

- **General Schedule 1 - Non-Records**
- **General Schedule 5 - Administrative Records**
- **General Schedule 6 - Accounting And Purchasing**
- **General Schedule 7 - Human Resources**
- **General Schedule 8 - Metadata**
- **General Schedule 9 - Technology Systems Records**
- **General Schedule 10 - Procurement Records**
### Agency-Specific Schedules

- Cover records that are unique to the agency
- Cover records not listed on general schedules
- Specific schedules override general schedules when records are listed on both
- May identify the format of a record

Agency-specific schedules cover records that are not listed on general schedules, because the records document the unique functions of the agency named on the document. Specific schedules always override general schedules when a record is listed on both, because the agency needs a different retention period than is listed on the general schedule.

Specific schedules may identify the format of a record.

Specific schedules are published on InsideMichigan (see the end of this training for instructions to access the website).
Currently, there are over 670 specific schedules for the Executive Branch, covering over 9,200 record series.

RMS works with agencies to develop and revise schedules, and then RMS routes the schedules for approval. If you need to create or revise a schedule, contact your department’s RMO, and they will contact RMS to initiate the project. Revisions are often fast and easy to do, so don’t hesitate to request assistance.
Following Retention Schedules

- All records need to be reviewed regularly (at least annually)
  - Identify which records to keep and which to destroy
- Office directors should designate a *records management liaison (RML)* to coordinate clean up activities
- RMS does not audit agencies to confirm compliance with schedules – it is the agency’s responsibility
- Applying retention saves space (physical and electronic), saves money, improves retrieval of information

Retention and Disposal Schedules can help and protect agencies, but are only useful if the agency uses them to apply retention. Agencies need to review all records (paper and electronic) regularly - monthly or annually, for example- to identify which to keep and which to destroy. Office directors should designate a *records management liaison (RML)* to coordinate clean up activities.

RMS does not audit agencies to confirm compliance with Retention and Disposal Schedules – it is the agency’s responsibility. Applying retention saves space (physical and electronic), saves money, and improves retrieval of information.
Agencies do not always have possession of all of their records. Some records may be maintained by a service provider instead, such as the Records Center, DTMB-IT, cloud service providers, contracted vendors, etc. These records are still the property of the agency and must be listed on the agency’s Retention and Disposal Schedule. The agency is responsible for ensuring these records are retained in compliance with the schedule.

Agencies should review their contract or service agreement to ensure that it references the retention period from the schedule (note that this can affect storage costs), defines the frequency of the record disposition process (destruction or transfer to the Archives of Michigan), establishes a process for suspending destruction for legal holds, and ensures that the destroyed records cannot be recovered, reconstructed or released. – per Administrative Guide Procedure 910.05.
Government agencies often receive requests to access their records. These requests may be the result of Freedom of Information Act (FOIA) inquiries, litigation, audits or investigations.

Authorized coordinators are responsible for collecting the requested records and releasing the applicable records. Other employees should not respond to these requests. The process of collecting and reviewing records can be very time consuming and expensive. However, if agencies regularly follow their schedules, fewer records will need to be reviewed and released.

It is also very important to stop destruction of relevant records when a request is received. A legal hold should be placed on all requested records, and the retention schedule should be suspended until the hold is lifted. Failure to stop destruction can result in significant penalties.

It is important to confirm whether the agency is subject to any legal holds before records are destroyed. Supervisors should be able to confirm if there are any legal holds that affect the office.
Litigation Holds

- Litigation holds suspend schedules
- Duty to preserve evidence begins:
  - Notice is received
  - Trigger event (examples)
    - Litigation is threatened
    - Plans are made to begin litigation against another party
    - Complaints or accusations are received
    - Communication from attorney is received stating that a party intends to commence litigation and demands the preservation of relevant information
  - Always consult Department of Attorney General about litigation

Litigation holds suspend schedules. However, when should agencies stop destroying records? The duty to preserve evidence begins when a notice is received, or when a trigger event happens. Some examples include:
- Litigation is threatened
- Plans are made to begin litigation against another party
- Complaints or accusations are received
- Communication from attorney is received stating that a party intends to commence litigation and demands the preservation of relevant information

Always consult Department of Attorney General or other legal counsel to confirm.
Why Follow a Retention Schedule?

- Risks associated with keeping records too long
  - Wastes space
  - Harder to find records you need
  - Records must be reviewed for FOIA and litigation
- Risks associated with destroying records too soon
  - Violation of Michigan law
  - Exposes agency to liability if the records are requested via FOIA or litigation
- Avoid random record purging by establishing a routine within the normal course of business for destroying records

Bottom line, why is it important to follow a retention schedule?

There are risks associated with keeping records too long: they waste space, they make it harder to find records you need, and the records must be reviewed for FOIA and litigation requests.

There are also risks associated with destroying records too soon: it is a violation of Michigan law, and it exposes the agency to liability if the records are requested via FOIA or litigation and they cannot be produced.

It is really important that agencies avoid random purging of records by establishing a routine within the normal course of business. Records clean up can take place at the end of the month, the end of the year, the end of the fiscal year, or at some slow time of year, if such a thing actually exists. Schedules cannot protect agencies from risks if they are never reviewed and implemented.
There are a lot of Retention and Disposal Schedules and some of them list a lot of records. You don’t have to memorize them all. Most employees work with only a few records series on a regular basis. You only need to know the retention periods for the records that support your job duties.
The next topic is preservation of historical records by the Archives of Michigan.
What does “Transfer to the Archives of Michigan” mean?

• After the agency’s need to use the record ends only two actions are possible:
  • Destruction
  • Transfer to the Archives of Michigan

• Requirement to transfer the records is documented on the Retention and Disposal Schedule
  • Legal obligation, records cannot be destroyed
  • Less than 5% of all government records are archival
  • All agencies have potential to produce archival records

After the agency’s need to use its records ends, only two actions are possible: destruction or transfer to the Archives of Michigan. The requirement to transfer records to the Archives is documented on the schedule. This requirement is a legal obligation, which means the records cannot be destroyed. Less than 5% of all government records are archival, but all agencies have the potential to produce archival records.
Why does the Archives want certain records?

- Preserve Michigan history
  - Document how government operates
  - Protect the rights of citizens
  - Document society or important events
- Make Michigan history available to the public
  - All formats: paper, electronic, audio, photographs, video, maps, microfilm, etc.
  - Examples:
    - Meeting materials of public bodies (minutes, agendas)
    - Election results and precinct maps
    - Transportation maps and engineering drawings
    - Vital records (birth, death, marriage, divorce)
    - Photos and videos of important people, events, places, etc.

The Archives of Michigan is responsible for the identification and permanent preservation of public and private records that document significant government activities and historic eras or events. Historically significant public records document how government operates, protect the rights of citizens, and document society or important events.

The Archives makes Michigan history available to the public. Records in the Archives are in all formats, including paper, electronic, audio, photos, maps, microfilm, etc. Examples include meeting records of public bodies, election results, transportation maps, vital records, photos, and more.
This is a picture of a map from the 1830s that is in the Archives. It is clear that the map makers did not understand the West side of the state very well. Very few people had explored this side of the state at that point in time, and they had not documented what the true coastline looks like.
What does the Archives do with the records?

- Records are kept forever
  - Never destroyed
  - If Archives determines later on that the records are not archival, the Retention and Disposal Schedule is changed to authorize destruction (agency is notified)
- Records are kept in a safe and secure environment
  - State-of-the-art storage space designed for preservation
  - Security controls and procedures
- Records are accessible to the public on-site and online
  - Special procedures are used to protect confidential records

The records in the Archives are kept forever, they are never destroyed. If the Archives determines later on that the records are not archival, the Retention and Disposal Schedule is changed to authorize destruction and the agency is notified.

The Archives keeps records in a safe and secure environment that includes state-of-the-art storage space that is designed for preservation. The Archives also employs security controls and procedures.

The records in the Archives are accessible to the public via on-site visit and online tools. Special procedures are used to protect confidential records in the Archives.
The Archives is located in the Michigan Library and Historical Center building at 702 W. Kalamazoo St in Lansing. You can call the Archives at 517-335-2576 or email them at archives@Michigan.gov. Their website is www.Michigan.gov/archivesofmi.
There are additional education resources and services that are available from Records Management Services.
### Records Management Training

- **Live Classes (register via the SOM Learning Center)**
  - Basic Records Management
  - How to Manage Records
  - Imaging and Document Management
  - Content Manager (CM9)

- **Online Training**
  - [SOM Learning Center](https://stateofmichiganlearningcenter.csod.com/client/stateofmichiganlearningcenter/default.aspx)

- **Online Guidance**
  - [InsideMichigan](https://stateofmichiganlearningcenter.csod.com/client/stateofmichiganlearningcenter/default.aspx)

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RMS offers free records management training to government employees. Live training is offered quarterly to state employees in Lansing. Employees can register for live classes via the SOM Learning Center. [https://stateofmichiganlearningcenter.csod.com/client/stateofmichiganlearningcenter/default.aspx](https://stateofmichiganlearningcenter.csod.com/client/stateofmichiganlearningcenter/default.aspx)

In addition, all classes and additional guidance documents are available online. Topics include Records Center user instructions, email management, confidential records destruction, and more. The online training is available via the SOM Learning Center, and online guides are available via [InsideMichigan](https://stateofmichiganlearningcenter.csod.com/client/stateofmichiganlearningcenter/default.aspx) (see the end of this training for instructions to access the website).
The State Records Center that is operated by RMS provides for the temporary storage of inactive physical records in boxes for state agencies. The State Records Center recently added a fee-based service called “Open Shelf” for unboxed storage of active paper records.

All records remain the property of the creating agency, and can only be accessed by authorized individuals. Agencies can pick up records at the Records Center for urgent retrievals. Normal retrieval is 1-3 business days. The building also has fire and theft protection.
Electronic Document Management

- 2 enterprise-available solutions
  - Content Manager (formerly HP Records Manager, TRIM)
  - FileNet
- RMS provides a needs assessment upon request

Records Management Services offers various electronic document management services to state agencies. The State of Michigan has two enterprise-available document management solutions. They are Content Manager (formerly HP Records Manager and TRIM) and FileNet. State agencies can contact RMS to request a needs assessment to determine which of these solutions will best meet their needs and budget.
RMS is available online. To find RMS online go to inside.michigan.gov. Go to the For Your Job menu. Select Records Management.
Quiz Time!

True or False?

1. I can throw away or delete records whenever I want.
2. Schedules only cover paper records that are sent to the Records Center for storage.
3. I made a copy of a PowerPoint presentation to take with me to a meeting. I can delete it after the event since it is a duplicate.
4. It’s ok to use my personal email account to communicate with a licensee about an upcoming site inspection.
5. Records management is overwhelming, and no one can assist me. It’s better to keep everything until I leave this job.

It’s quiz time! Are the following statements true or false?

1. I can throw away or delete records whenever I want.
   Answer: False. Retention and Disposal Schedules define how long records must be kept.
2. Schedules only cover paper records that are sent to the Records Center for storage.
   Answer: False. Schedules provide the legal authorization to destroy records. So they cover all records, in all formats, regardless of where they are stored.
3. I made a copy of a PowerPoint presentation to take with me to a meeting. I can delete it after the event since it is a duplicate.
   Answer: True. Duplicates are non-records that can be destroyed when their reference value ends.
4. It’s ok to use my personal email account to communicate with a licensee about an upcoming site inspection.
5. Records management is overwhelming, and no one can assist me. It’s better to keep everything until I leave this job.
   Answer: False. Records Management Services and your department’s RMO are available to assist you if you have questions about how long to keep certain records. There are risks associated with keeping records too long, so it is best to destroy eligible records on a regular basis.
Thank you for attending. You will receive an email in 1-2 days inviting you to fill out an evaluation of this class.

Login to the State of Michigan Learning Center. Go to the Learning menu. Select View Your Transcript. Find this class in the list, and select the Evaluate button.

Evaluation is open for 10 days
We can help!

Records Management Services
3400 N. Grand River Ave.
Lansing, Michigan 48909
517-335-9132

Please contact Records Management Services if you need assistance with records retention, recordkeeping systems, and other records management issues. The phone number is 517-335-9132.

Thank you for taking this online class. We hope you will visit our website and take more records management classes.