

## Snack It & Pack It

# Snack It & Pack It

Records Management Services  
State of Michigan



**Notes:**

Welcome to “Snack It & Pack It,” offered by the State of Michigan, Records Management Services.

# Objectives

2/20

- Promote routine clean-up of records
- Prepare office for Snack It & Pack It day
- Help identify which records should be:
  - Kept
  - Stored at the Records Center or Archives
  - Destroyed



**Notes:**

The objectives of this course are to promote routine clean-up of records, prepare your office for Snack It & Pack It day, and to help identify which records should be: kept, stored at the Records Center or Archives, or destroyed.

- Purpose

- Kick start record clean-up
- Initiate a routine clean-up habit



**Notes:**

The purpose of Snack It and Pack It day is to kick-start record clean-up, and to initiate a routine clean-up habit.

- Should be comprehensive
  - Central office records and records maintained by individual employees
  - All formats: paper and electronic
  - All employees need to participate
- Is a good thing
  - Saves space and money
  - Reduces risk
  - Easier if it is done more frequently



**Notes:**

Records clean-up should be comprehensive. It needs to include central office records and records maintained by individual employees. It needs to include records in all formats, both paper and electronic. All employees need to participate in the clean-up activities. Records clean-up is a good thing. It saves space and money, reduces risk, and it is easier if it is done more frequently.

- **Month before**
  - Identify a coordinator
  - Schedule clean-up date
- **Two weeks before**
  - Order RC boxes
  - Return checked out files to central filing system
  - Identify legal holds
- **Day of**
  - Wear casual clothes
  - Bring food
  - Distribute Retention and Disposal Schedules
  - Assign clean-up duties for shared files (paper and electronic)



**Notes:**

There are things you need to do to prepare for Snack It & Pack It day. A month before, a coordinator should be identified. The clean-up date should be selected, and employees' calendars should be blocked off, so they do not schedule meetings on that date. Two weeks before the date, the coordinator should order Records Center boxes. Employees who checked out files from the central filing system should return them, if they don't need them anymore. Also, the coordinator should identify any pending FOIA, litigation or audit activities that would override implementation of the Retention and Disposal Schedule for the records. On the day of the event, employees should wear casual clothes and bring food to share. The coordinator should distribute copies of Retention and Disposal Schedules to all employees, both general schedules and agency-specific schedules. Also, the coordinator should assign clean-up duties for shared files, both paper and electronic.



**Notes:**

Did you know that on average, 30% of records in offices need to be retained, but are not retrieved regularly, and are good candidates for low-cost, off-site storage? 40% of records in offices have met their retention requirements and should be destroyed. This makes it a whole lot harder to find the 30% of records in offices are needed for on-site reference activities. This is why your office needs a clean-up day.

- Schedules identify how long records must be kept
- Schedules provide the only legal authorization to destroy records
- Compliance is the agency's responsibility
- [Published online](#)



**Notes:**

Retention and Disposal Schedules identify how long records must be kept. They provide the only legal authorization to destroy records. Compliance with schedule is the agency's responsibility, Records Management Services does not audit agencies for compliance. The schedules that are used by state agencies are available online at <https://stateofmichigan.sharepoint.com/teams/insideml/recordsmanagement/Pages/schedules.aspx>.

## Where are the records?

8/20

- Shared computer network drives
- Electronic document management systems
- Email accounts
- Office's centralized filing cabinets
- Individual work spaces
- Secret places nobody talks about (closets, basements, attics, old cabinets)



**Notes:**

Records can be stored in a lot of places, including shared computer network drives, electronic document management systems, email accounts, centralized filing cabinets, individual work spaces, and sometimes in secret places that nobody wants to talk about...



- Review schedules to identify records that should be:
  - Sent to the Records Center
  - Sent to the Archives of Michigan
  - Destroyed
- If you find records in your office that are not listed on a schedule, don't destroy them
  - Contact [Records Management Officer](#) for assistance



**Notes:**

Retention and Disposal Schedules define which records should be sent to the Records Center for temporary storage, transferred to the Archives of Michigan for permanent preservation, or destroyed. If you find records in your office that are not listed on a schedule, don't destroy them. Contact your department's [Records Management Officer](#) for assistance.

- [General Schedule for Non-records](#) authorizes destruction of items that do not document agency activities
  - Publications from outside sources
  - Mass mailings that are received and require no action
  - Junk mail and spam
  - Reference materials collected from outside sources
  - More...



**Notes:**

The [General Schedule for Non-records](#) authorizes the destruction of items that do not document agency activities. These may include publications from outside sources, mass mailings that are received and require no action, junk mail and spam, reference materials collected from outside sources, and more.

- General Schedule for Non-records authorizes destruction
  - Draft documents that are replaced by new or final versions
  - Drafts that are not needed to document the development of the final record
  - Drafts that are not required to be retained by an agency-specific schedule



**Notes:**

The General Schedule for Non-records authorizes the destruction of drafts, including draft documents that are replaced by new or final versions, drafts that are not needed to document the development of the final record, and drafts that are not required to be retained by an agency-specific schedule.

- General Schedule for Non-records authorizes destruction
  - Reference copies
  - Paper vs. electronic copies
  - Multiple office copies
  - Employee copies



**Notes:**

The General Schedule for Non-records authorizes the destruction of duplicates, including reference copies. If your office maintains certain records in both paper and electronic formats, this general schedule allows you to declare one of them to be a duplicate and destroy it. Also, remember that there are many situations where multiple offices possess copies of the same record. Only one is responsible for recordkeeping, so you need to communicate with the other office to determine who has the duplicate that does not need to be retained. Finally, employees should try to reduce the volume of duplicate copies they keep at their desk or in their email account.

- [General Schedule for Administrative Records](#) authorizes destruction of transitory records when their reference value ends
  - Document work activities, but have short-term value
  - Examples include: phone messages, reminders on sticky notes, temporary documents that are replaced by other records



**Notes:**

The [General Schedule for Administrative Records](#) authorizes the destruction of transitory records when their reference value ends. Transitory records document work activities, but have short-term value. Examples include phone message, reminders on sticky notes, and temporary documents that are replaced by other documents.

- Destroy or delete non-records and records past their retention period
- Take unnecessary personal items home
- Use confidential destruction bins for items with sensitive information
- Use recycling bins for non-sensitive items

**CONFIDENTIAL**



**NOT CONFIDENTIAL**



**Notes:**

It is really important to destroy or delete non-records and records that have already met their retention period. Also, take home personal items that you don't need at work. Remember to use confidential destruction bins for items with sensitive information, and to use recycling bins for non-sensitive items.

- Inactive records can be sent to the [Records Center](#) for storage
- Schedules indicate which records need to be transferred to the Archives of Michigan for permanent preservation
  - Contact the Archives at [archives@michigan.gov](mailto:archives@michigan.gov)
- Authorized users can submit boxes to Records Center using *the Records Center database*
  - Contact RMO to get a user account



**Notes:**

Inactive records can be sent to the [Records Center](#) for temporary storage. Schedules indicate which records need to be transferred to the Archives of Michigan for permanent preservation. Contact the Archives via email at [archives@michigan.gov](mailto:archives@michigan.gov) for assistance. Authorized users can submit boxes to Records Center using the Records Center database. Employees who need a user accounts should contact their department's RMO for assistance.

- Clean up electronic files:
  - Databases/IT applications
  - Shared network drives
  - Individual network drives
  - Email accounts
  - External discs and drives
- Someone in the office should be assigned responsibility for cleaning shared digital storage
- DTMB-IT or a service provider may need to conduct disposition for databases or IT applications
  - Written procedures are needed



**Notes:**

Don't forget to use Snack It & Pack It day as a time to clean up electronic files too. These files may be stored on databases, IT applications, shared network drives, individual network drives, email accounts, external disks and drives, and other places too. Someone in the office should be assigned responsibility for cleaning shared digital storage. DTMB-IT or a service provider may need to conduct disposition for databases or IT applications. If so, a contract or charter should specify the disposition procedures.



# Suspending Destruction

17/20

- **FOIA, Litigation, Audit, Investigation**
- Legal holds suspend retention schedules, so destruction must cease
- Holds apply to records in all formats
- Failure to cease the destruction could result in penalties
- Confirm holds before destroying records
  - Check with your supervisor, FOIA and litigation coordinators



HELP. CONNECT. SOLVE.

## Notes:

It is very important to suspend destruction of records that are the subject of Freedom of Information Act (FOIA) requests, litigation holds, audits or investigations. Legal holds suspend retention schedules until the hold is lifted. Holds apply to records in all formats, paper and electronic. Failure to cease destruction of records could result in penalties. Employees should confirm whether there are any active holds applying to the records they are planning to destroy by checking with supervisors, FOIA coordinators, or litigation coordinators.

- Coordinator will distribute a [tip sheet](#)
- Contains suggestions to help with clean-up of paper and electronic files



**Notes:**

Your coordinator will distribute a [tip sheet](#) containing suggestions to help you with clean-up of both paper and electronic files.

## Snack It & Pack It Day!

Don't be an ,  or . Get all your  in a row!




You have  and  of  all over the .

Take a few  steps and  from your daily responsibilities to clean.

Remember to  and delete your . It will only take a .

 big by cleaning and help save your office .

Let's make sure there is  space in the office and network storage.

Don't be a .  and all your  are doing it. So should you!

Ps: Be sure to  and  while you clean. It will make the time fly!

### Notes:

Don't be an air head, milk dud or goober. Get all your chicks, ducks and bunnies in a row! You have mounds and mounds of whatchamacallit all over the milky way. Take a few extra steps and detour from your daily responsibilities to clean. Remember to take 5 and delete your spam. It will only take a minute. Skor big by cleaning and help save your office 100 grand. Let's make sure there is good and plenty space in the office and network storage. Don't be a ding dong. Mike and Ike and all your peeps are doing it. So should you! Ps. Be sure to snicker and chuckle while you clean. It will make the time fly!

### Records Management Services

3400 N. Grand River Ave.

Lansing, Michigan 48909

(517) 335-9132

[inside.michigan.gov/recordsmanagement](https://inside.michigan.gov/recordsmanagement)



**Notes:**

Please contact Records Management Services if you need assistance with records retention, recordkeeping systems, and other records management issues. Thank you for taking this online class. We hope you will visit our [website](https://inside.michigan.gov/recordsmanagement) and take more records management classes.