

SECTION: 4.0 ADMINISTRATIVE
SUBJECT: RECORDS RETENTION

Title: Records Retention

Background: The State of Idaho Department of Administration, under Idaho Code Section 67-5752, is responsible for the development of a statewide records management system. The State's Records Management Guide: <http://history.idaho.gov/idaho-records-center-retention-schedules> exists to assist individual agencies in designing their own specific retention schedules. Within the Guide, a State Board of Education section exists, including a schedule specifically tailored to Higher Education: https://history.idaho.gov/wp-content/uploads/Education_Higher_Ed_Records_Book_0.pdf

Point of Contact: Administrative Services

Other LC State offices directly involved with implementation of this policy, or significantly affected by the policy: N/A

Date of approval by LC State authority: July 2022

Date of State Board Approval: N/A

Date of Most Recent Review: July 2022

Summary of Major Changes incorporated in this revision to the policy: Formatting changes using LC State style guide

1. Policy

This policy summarizes Lewis-Clark State College (LC State) records retention policy and procedure, and sets forth the schedules to be used within the institution.

2. General

- A. As per the guidelines set forth by the Department of Administration at: <http://history.idaho.gov/records-center> and the SBOE, LC State has developed, and periodically updates, a general college-wide retention schedule as well as department-level or "retaining department" schedules. This segregation recognizes the different retention requirements that a responsible department may have as opposed to other offices (ex: Payroll records maintained by HRS vs. the employing department).
- B. College-wide Retention Schedule: <https://www.lcsc.edu/media/2531/lcscretentionschedule9-13-12.pdf>
- C. LC State Departmental Retention schedules: <http://www.lcsc.edu/administrative-services/records-management/>
- D. The above link directs the user to retention schedules for ten separate areas on campus: Instructional Division, Administrative Services, Admissions, Continuing Education & Community Events, Distance Learning, Information Technology, New Student Recruitment, Workforce Training, the Provost's Office, and Purchasing. Within each area schedule, retention requirements for all primary functions (Academic, Administrative, Fiscal, Personnel, etc.) are detailed, with the "Office of Origin" identified as the retaining department. If a particular document cannot be found among these schedules, or you have questions concerning conversion of files to electronic records, contact Administrative Services, in the office of the vice President for Finance and Administration for assistance. Retention of records involves, time, expense and effort, documents should be disposed of when no longer needed, subject to the retention schedules.

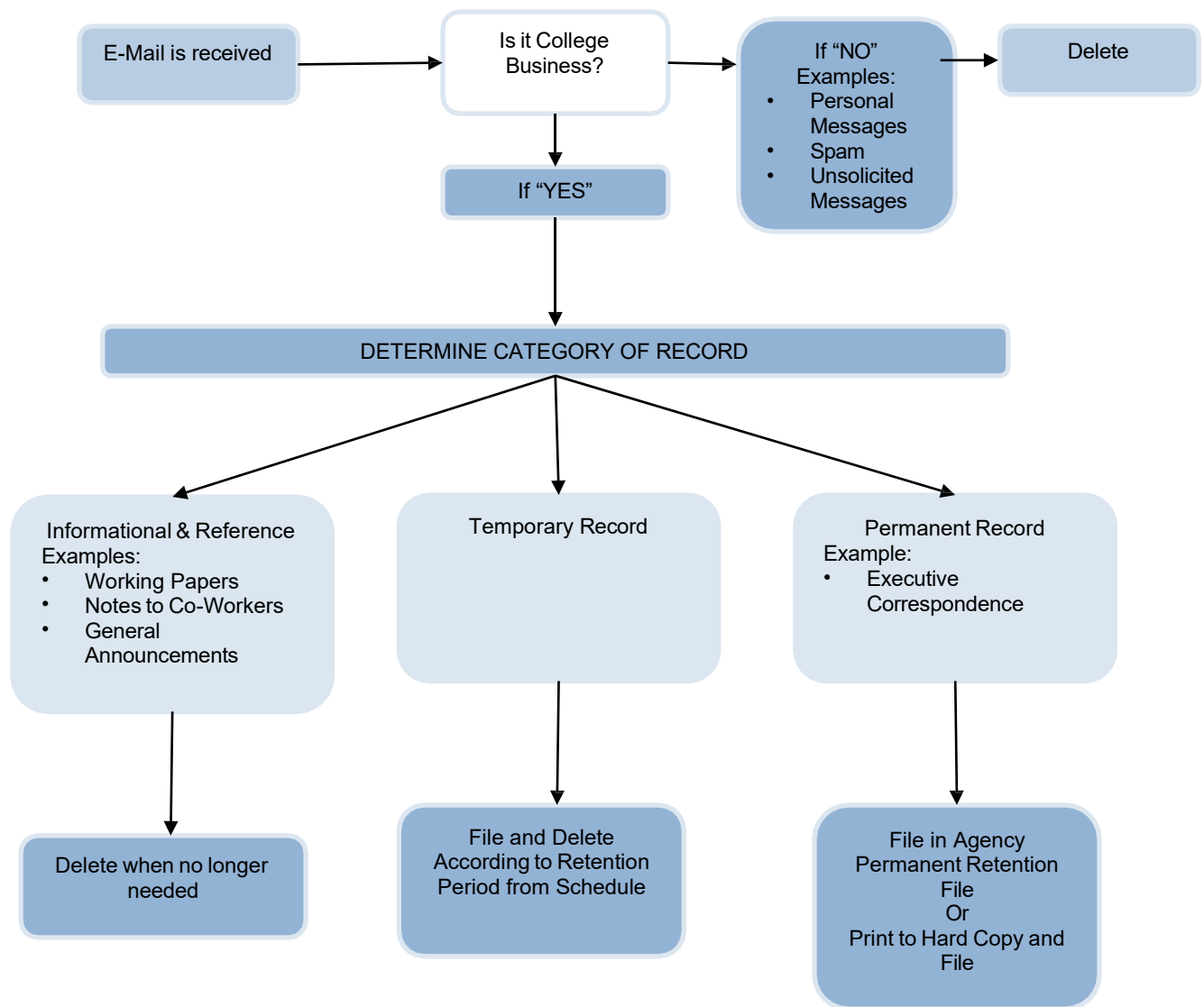
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3. Electronic Correspondence (e-mail)

- A. LC State recognizes the guidelines of the Idaho Records Center (see Records Management Guide, above Appendix 7) with regard to the retention of e-mail correspondence. Find summary diagrams below.

FIGURE 1.1: DECISION SEQUENCE FOR DETERMINING E-MAIL RETENTION



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FIGURE 1.2: DETERMINING RESPONSIBILITY FOR RETAINING E-MAIL MESSAGES

Because e-mail messages can be forwarded and routed to multiple addresses, copies of the messages may exist in many areas of the agency. In most cases, the author, or originator, of the e-mail message is responsible for maintaining the "record" copy. However, in cases in which the recipient has altered the message (made changes, added attachments, etc.) or when the message is coming from outside the agency (and, therefore, not documented anywhere within the agency), the recipient is the one responsible for retaining the message.

