

Do I have to process this through the Records Management (RM) Program?



- Is it information, that provides evidence of a business transactions or activities of the unit?
- Has it been received or created (or is being created) and needs to be maintained and accessible by the office, department or individual in pursuance of Dal's mission, its legal obligations or in the transaction of business?

If you answer **yes** to either of these questions
- IT IS a record
& has to be processed under the RM Program
 as per the RM Policy

Now Go To [DalCLASS](#)

What retention do I use?

- Is this information unique & it only sits here in my unit?
- Is my unit considered the 'Dal Service' in this situation surrounding this business activity?

If you answered yes to either of these questions your office is a **Primary Office**

- Am I using a service at Dal?
 Examples:
 - HR
 - Financial Services
 - Registrar Office
 - FGS

If yes then you are a **Secondary Office**

- Is it a Reference or Convenience copy?
- Is it Transitory or temporary utility and are not required for statutory, legal, fiscal, administrative, operational or archival purposes?
- General in nature?

If the answer is **yes** to any of these -
It is NOT a record
 & does not have to go through the RM Program

Does it contain sensitive, confidential, personal or private information?

