

WASHINGTON STATE UNIVERSITY


Administrative Policies and Procedures

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Office of Procedures, Records, and Forms

Revised May 2018



Training Objectives: Manuals


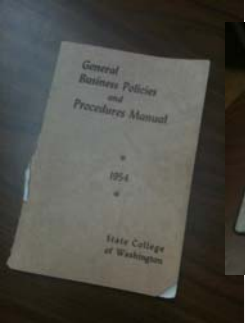
- History of operations manuals at WSU.
- Why we have operations manuals.
- How to use online manuals.
- How the manuals are updated.




History Lesson

1954 BPPM


1960s Manual






History Lesson

- 1972 State Audit Report
- Hard Copy BPPM, SPPM
- 1997 Online Manuals
- 2000 Executive Policy Manual
- 2016 Board of Regents Policy Manual
- 2018 WordPress CMS website



Why have manuals?

- Serves as a quasi-supervisor. Always in. No trips or leave. Fewer phone calls. Fewer errors.
- Primary communications device. Provides knowledge of laws, regulations, and institutional practices.




Why have manuals?

- Institutional memory.
- Levels playing field.
- Standardizes practices. Promotes efficiency.
- Consolidates location.

Where to Find Manuals

- Uniform Resource Locator (URL):
<https://policies.wsu.edu/prf/index/manuals/>
- WSU Home Page
- A-Z Index


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Business Policies and Procedures (BPPM)

[Introduction](#) | [Table of Contents](#)

The Business Policies and Procedures Manual (BPPM) is intended to guide and assist employees and administrators in the conduct of day-to-day administrative functions of the University.

Topics in the BPPM have a general interest to many or all University departments. The BPPM does not include sections that exclusively describe internal central administration procedures or procedures that impact only one or two University units.

The BPPM contains instructions for completing forms and provides detailed procedures for requesting services from University units and external organizations.

Procedures are based upon approved University administrative policies and applicable state and/or federal statutes and regulations. Sections may include both policy and procedural statements.

Safety Policies and Procedures (SPPM)

[Introduction](#) | [Table of Contents](#)

The WSU Safety Policies and Procedures Manual (SPPM) is the primary publication used by the University administration to distribute safety and health information, directives, policies, and regulations to the University community.


The manual includes subject areas that roughly correspond to University safety and health functions, i.e., accident prevention, accident reporting, accident follow-up, protective equipment, motor vehicle safety, fire safety, environmental health, occupational health, and radiation safety.

Executive Policy Manual (EP)

[Introduction](#) and [Table of Contents](#)

How to Find Information

- Search engine
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
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Travel Authority

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PRIOR APPROVAL

Official University travel requires prior approval by an appropriate University administrator. (See BPPM 95.01, and Dean/Director /Chair/Approving Official below.)

Written Prior Approval


Written prior approval on a Travel Authority (TA) form is required in the following circumstances. The department routes or retains the TA as indicated.

- When a travel advance is requested. Route the approved TA to Travel Services.
- When conference registration is to be paid in advance by Accounts Payable. Route the approved TA to Accounts Payable.

RETAINING APPROVED TA IN DEPARTMENT

In each of the following six circumstances, the department must retain the approved TA in the departmental files. The department does not route the approved TA to Travel Services or Accounts Payable.

- When the traveler will be going out of state or out of the country. (SAAM 10.10.50) See also BPPM 95.15 for information about foreign travel.
- When a privately-owned, rented, or chartered aircraft will be used (see BPPM 95.30).
- When official WSU travel is partially or entirely supported by funds not administered by the WSU Controller's Office, e.g., from a third party (another educational institution, a private organization) or the traveler's personal funds (see BPPM 95.16).



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Rented Aircraft

Submit the original TA or substitute TA to Purchasing at least ten days before anticipated departure (see also BPPM 95.30).

Conference Registration

Submit the original and a copy of the TA and the registration form to Accounts Payable at least ten days before the fee is due.

Foreign Travel

See BPPM 95.15.

FORMS:


- [Travel Authority](#)
- Available in FileMaker format

Announcing Revisions

- Procedures, Records, and Forms sends out an e-mail message on WSU Insider Announcements.
- To subscribe refer to:
<https://insider.wsu.edu/>

NOTE: Be sure to select the **Daily Announcements** link at the end of each day's WSU Insider news e-mail message to view all of the day's announcements.

- Revision announcements are linked to the Manuals web page.



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BPPM Revisions

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04/09/18	Toll Call Authorization; ITS Online Customer Statements	512
04/04/18	Employment Eligibility Verification-USCIS Form I-9; Telephone Dialing Procedures	511
03/12/2018	WSU Organization; Moving Services at WSU Pullman	510
02/13/2018	Printing Services; Miscellaneous Travel Expenses	509




Revising Manuals: Sources

- Auditors
- Statutes/regulations
- Administrators
- Users



Revising Manuals: Process

- Input
- Prepare draft
- Review and approval



OFFICE OF PROCEDURES, RECORDS, AND FORMS
Executive Policy Manual

Executive Policy #5
Revision Approved September 25, 2014

Policy Approval and Distribution

 Print

SUMMARY

University policies and procedures are to be appropriately approved, published, and distributed in designated and authorized publications and web locations. This policy outlines the drafting, review, approval, and distribution processes for administrative, business, and safety policies and procedures.

POLICY

University personnel are to obtain appropriate approvals prior to publication of University policies and procedures.


University policies are to be consistent with provisions of the Washington Administrative Code and the Revised Code of Washington.

University policies and procedures are to be published and distributed in designated and approved publications and approved web locations.

Advisory guidelines which supplement University policies and procedures may be published and distributed from departmental websites.


APPLICABILITY

This policy applies to University policies, procedures, and advisory guidelines related to administrative, business, and safety functions that affect many or most University units.




Distribution

- Convert to HTML and PDF
- Upload to UNIX
- Notify University
- Save old section in archive media



You should now know:

- How to locate manuals online.
- How to find information in manuals.
- How manuals are updated and how to find out when manuals are updated.




Records Retention

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Office of Procedures, Records, and Forms
509-335-2005



Training Objectives: Records


- State definition of records.
- How to find out how long to keep records.
- Which records are confidential.
- How to dispose of records.



Records Retention: What are we talking about?


Management of records for
the period of time between
record creation and record disposition.

What we do with it and
how long we keep it.




Why do we keep records at WSU?

- We need to document our business.
- We need to meet requirements of laws/regulations.
- We need to be able to recreate the history of WSU.




State of Washington Records

Any paper, photograph, film, sound recording, map drawing, machine-readable material or other document, regardless of physical form, made or received by the state in connection with the transaction of public business.
(From RCW 40.14.010)




Legal Requirement: RCW 40.14 (Preservation and Destruction of Public Records)

University records are public records. Public records may not be destroyed, microfilmed, or transferred to archives without authorization.




Records Officer

- Coordinates University's records retention program.
- Prepares retention schedules.
- Liaison with State Records Committee.




Responsibility for Records

- Primary responsibility resides with each individual University office.
- The unit director/manager/chair designates a departmental records coordinator.



Records Coordinator

- Liaison with Records Officer
- Notifies Records Officer changes in office records.
- Files and refers to records retention schedules.
- Applies retention standards to records.
- Ensures that department personnel apply retention standards to records held in their files and computers.



Why not just keep everything?

- Must look through it.
- Must track it.
- Takes up expensive space.
- Causes additional processing in litigation, audit, or public records requests.





Some records are essential records.


Records you would need to restart your operation after a catastrophe.
See 90.15.

Back up and store offsite.



1997 Kincaid Fire - UW





All-University Records Retention Schedule

BPPM 90.01

RECORDS
96.01
Revised 7-17
Procedures, Records, and Forms
509-335-2005

ALL-UNIVERSITY RECORDS RETENTION SCHEDULES

Administrative-General Office Operations

Print section

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Record Series Title—Function/Purpose	Location (*Official Copy)	Retention and Disposition Action	Disposition Authority No.	Remarks
ADVISORY BODY RECORDS Records documenting the actions, meetings and membership of boards, commissions, committees, councils, task forces, etc., that are created to act strictly in an advisory capacity to the University and have no final decision-making powers. Also includes interagency/ national/external advisory bodies for which the University acts as secretary/keeper of the official records. Includes, but is not limited to:	Department*	Retain for 5 years after end of calendar year, then Transfer to Archives for appraisal and selective retention.	GS 10015	Archival (appraisal required)
<ul style="list-style-type: none"> - Agendas, meeting/agenda packets (briefs, reference materials, etc.); - Speaker sign-up, written testimony; - Audio/visual recordings and transcripts of proceedings; 				


*Minutemen

[illegible]

ALL-UNIVERSITY RECORDS RETENTION SCHEDULES			
Administrative-General Office Operations			
CONTACT INFORMATION Records relating to the contact details of external clients/stakeholders the University has gathered/received and the maintenance of such lists/collections. Includes, but is not limited to: <ul style="list-style-type: none"> - Business cards; - Contact details stored in Microsoft Outlook and other contact databases; - Mailing lists, email distribution lists, listserv/RSS subscriber details, etc.; - Requests to be added/removed from the University's contact lists (includes mail/communications returned as undeliverable). 	Department*	Retain until no longer needed for University business, then destroy.	GS 50007
DRAFTING AND EDITING Records relating to the drafting/editing of correspondence, documents, and publications. Includes, but is not limited to: <ul style="list-style-type: none"> - Preliminary drafts not covered by a more specific records series, not needed as evidence of external consultation or as evidence that the University practiced due diligence in the drafting process; - Edits/suggestions/directions (such as handwritten annotations/notes, track changes information/comments in Microsoft Word, etc.); 	Department*	Retain until no longer needed for University business, then destroy.	GS 50008


ALL-UNIVERSITY RECORDS RETENTION SCHEDULES			
Administrative-General Office Operations			
INFORMATIONAL NOTIFICATIONS/COMMUNICATIONS Records communicating basic/routine short-term information (regardless of format or media used) that: <ul style="list-style-type: none"> - Do not document University decisions/actions; - Are not used as the basis of University decisions/actions; and - Are not covered by a more specific records series. <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> - Basic messages such as "Come and see me when you're free," "Call me back at (360) 555-5555," etc. - Internal communications notifying of staff absences or lateness (such as "Bob is out today," "Mary is running late," etc.). 	Department*	Retain until no longer needed for University business, then destroy.	GS 50001 Rev. 2
INTERNET BROWSING Records routinely generated as part of internet browsing. Includes, but is not limited to: <ul style="list-style-type: none"> - Browsing history/saved passwords/web form information, etc. - Cache/temporary files - Cookies 	Department*	Retain until no longer needed for University business, then destroy.	GS 50010

ALL-UNIVERSITY RECORDS RETENTION SCHEDULES			
Administrative-General Office Operations			
REFERENCE MATERIALS Materials gathered from outside sources for reference/reading use which are not evidence of the University's business transactions. Includes, but is not limited to: <ul style="list-style-type: none"> - Conference materials (such as proceedings, handouts, etc.) from conferences/seminars not organized by the University; - Copies of published articles, reports, etc.; - Internet browser favorites/bookmarks; - Listserv/RSS feeds. 	Department*	Retain until no longer needed for University business, then destroy.	GS 50013
SECONDARY (DUPLICATE) COPIES Copies of records (created or received), provided that the University retains the primary copy of the record in accordance with the current approved minimum retention period. Includes, but is not limited to: <ul style="list-style-type: none"> - Data extracts and printouts from University information systems; - Ccs of emails, provided the University is retaining its primary copy of the email; - Convenience/reference copies of records; - Duplicate and near-duplicate images/photographs provided the selected "best" images documenting the 	Department*	Retain until no longer needed for University business, then destroy.	GS 50005 Rev. 1




State Requirement

- WAC 434-662-040, effective January 1, 2009
- Electronic records must be retained in electronic format and remain usable, searchable, retrievable and authentic for the length of the designated retention period.
- Printing and retaining a hard copy is **not** a substitute for the electronic version.




State Imaging Standards


- Must be observed when agency wants to use the image as the record copy and dispose of paper original.
- Not required when agency uses the image as a working copy and retains the paper original for the approved retention period.
- To obtain a copy of or a link to the standards, contact Office of Procedures, Records, and Forms. See also BPPM 90.21.



E-Mail, Text, Voicemail, and Social Media


- Most e-mail, text, voicemail, and social media messages are transitory communications.
- Some e-mail, text, voicemail, and social media messages are public records requiring retention. Evidence of official policies, actions, decisions, or transactions.
- See BPPM 90.03.






Saving Text, Voicemail, and Social Media Messages

- To save text or social media messages, manually:
 - Send the messages to a University email account. Save as email.
 - Save the messages to a University-controlled server or content management system.
- To save voicemail messages:
 - Contact applicable telephone provider.
 - Use Single Inbox Messaging to save message as .WAV file attachment to University email



Manage Your E-mail

- Don't let thousands of e-mail messages clutter your e-mail account.
- Delete immediately if you don't need it.
- Have a timetable for reviewing e-mail.
- Store e-mails with longer-term retentions in special folders in Outlook or elsewhere (e.g., your computer, a shared drive).



Important to Remember:

E-mail, text, social media, and voicemail messages created to conduct University business are public records
EVEN IF the messages are sent from or received on personal devices, e.g., cell phones, tablets, laptops.


**Washington state**AUGUST 27, 2015

Court: Texts on public employee's cellphone public records


BY MANTHA BELLISLE
Associated Press

SEATTLE — The Washington Supreme Court on Thursday unanimously ruled that a public employee's work-related text messages sent and received on a private cellphone are public records.

The ruling came in a case filed by Pierce County Sheriff's detective Glenda Nissen, who had asked for Prosecutor Mark Lindquist's call and text records. Nissen had sued the county claiming Lindquist banned her from his office after she criticized the prosecutor and backed his opponent. The requests included texts that he made and received on his private cellphone.

**Determining Retention**

- Legal requirements.
- Fiscal and audit requirements
- Functional needs of office
- Historical and archival requirements.


**To schedule a record:**



- Check the All-University Schedule in BPPM 90.01.
- Check any unique departmental schedule.
- Complete a Retention Schedule Review form (see 90.01.8). Route to PR&F.
- Procedures, Records, and Forms prepares a draft.
- Approvals by department, records officer, State Records Committee.



Retention Schedule Superseded

- Litigation holds
- Public records requests
- Audits



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Andersen guilty

Once grand accounting firm now faces five years probation, \$500,000 fine and possibly its own end.
June 16, 2002: 4:43 PM EDT
By Luisa Redden, Brett Gering and Alice Martin

NEW YORK (CNN/Money) - A jury Saturday found Arthur Andersen guilty of obstructing justice, all but sealing the fate of the once mighty accounting firm.

After a six-week trial and 10 days of deliberations, jurors convicted Andersen for obstructing justice when it destroyed Enron Corp. documents while on notice of a federal investigation. Andersen had claimed that the documents were destroyed as part of its housekeeping duties and not as a ruse to keep Enron documents away from the regulators.

Andersen now faces up to 5 years probation plus a \$500,000 fine.

The 12-member jury reconvened at the Houston court house at 10 a.m. ET and shortly thereafter declared that they had a verdict. Judge Melinda Harmon read the decision at 10:25 a.m. ET. Later, when the jurors were polled, they all individually said "guilty."


Government lawyer Andrew Weissmann said the case sends a signal. "When you expect the police, don't destroy evidence," he said. "For Andersen, the police was the [Securities and Exchange Commission]."



Storage of Inactive Records


- WSU Pullman: Facilities Services, Capital at 509-335-5571
- Other locations: Campus facilities management
- Store records at State Records Center in Olympia
- Store inactive electronic records offline, e.g., tape, external hard drive, dedicated storage server
- ~~NOTE: State records must be kept in a state~~





Records Disposal


- Send to Manuscripts, Archives, and Special Collections (MASC).
 - See BPPM 90.02 for more information regarding archival records.
- Recycle.
- Make illegible if confidential.



Which records are confidential?


All records which are exempt from public disclosure in accordance with state law. (RCW 42.56)

Refer to BPPM 90.05, 90.06, 90.07.



Partial list of confidential records

- Personal information
- Lists for commercial purposes
- Application information
- Tests
- Library records




Disposal of Confidential Records

Records must be reduced to an illegible condition.
(WAC 434-640-020)




Shredding

- University Recycling at WSU Pullman
- Commercial shredder (Iron Mountain)
- Departmental shredder



Destruction of Electronic Records

- Hard Drives
- CDs and DVDs
- Tapes
 - See “Specific Item or Transaction Requirements” in BPPM 20.76 for more information regarding destruction of digital media.



You should now know:

- State definition of records
- How to read a records retention schedule
- How to schedule a record
- What to do with old records
- How to determine if a record is confidential
- How to dispose of records



Questions???

Contact PR&F

- Telephone 509-335-2005
- E-mail dbartl@wsu.edu
- E-mail faerber@wsu.edu
- E-mail prf.forms@wsu.edu

WASHINGTON STATE UNIVERSITY



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WSU Training
Videoconference

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and wish to have your attendance
documented in your training history,
please notify Human Resource Services
within 24 hours of today's date:

hrstraining@wsu.edu
