THIRD PARTY SOFTWARE BEST PRACTICES

RECORDS RETENTION
Records must be maintained in accordance with a legally approved University Records Retention Schedule.

USABILITY
Ensuring easy identification and retrieval of records, and allowing deletion/purging of records past retention.

PRIVACY & SECURITY
Service provider must meet all the relevant information privacy and security requirements.

ACCOUNT MANAGEMENT
Defining and controlling access to records.

IMPLEMENTATION
Approving and standardizing use throughout the department.

CONTRACT NEGOTIATION
Documenting important vendor obligations within the contract with the cloud provider.

RECOVERY
Mitigate disruptions with frequent backups and creating standard operating procedures for events that may diminish services.

Per WAC 434-615-020, University offices and departments can use cloud applications to store university records provided that the records are managed properly. Managing records properly includes the ability to respond to audits, public records requests, and litigation, retain records for their full retention period, and delete records at the end of their retention period.

Storing records with an outside vendor does not absolve UW employees from the responsibility for proper retention and management of the records.

UW Records Management Services is here to help you maintain compliance with records and information governance principles. Contact us at recmgt@uw.edu.

REPOSITORIES
File storage + sharing applications that store files you have created outside of the cloud. Files can be accessed by you and/or others via the Internet.

 e.g. OneDrive, Google Drive, Dropbox

TOOLS
Productivity tools you use to create unique types of records and store them within the application itself.

 e.g. Trello, Slack, Jira

HYBRIDS
Software as a Service (SAAS) databases and other structured content systems that store their information in the cloud.

 e.g. Workday, SalesForce