



TIME TO PAC UP

Records Management Moving Guide

Chief Administrative Officers

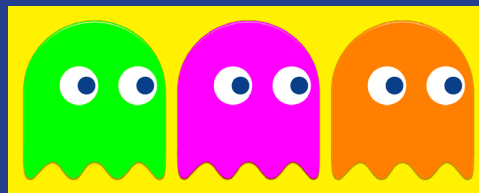
- Allow time for employees to manage their records
- Have your records officer invite the State Archives to give a brief training during your staff meeting
- Allocate resources for boxes and other supplies
- Arrange sufficient record-shredding services with a reputable shredding company
- Contact your records officer with questions

Destroy records which have met retention

- Keep a log of all records being destroyed
- Records containing restricted information should be destroyed by a reputable shredding company

Records Officers

- Read the records officer moving guide available at bit.ly/3gXtY97
- Be a resource for your agency
- Contact the State Archives with any questions



Move your “active” paper records to the new building

- “Active” records are accessed at least once a month
- Sort records into boxes; write down what’s in each box
- Keep track of which boxes have been moved, when, and by whom
- Coordinate as an agency to securely transport records from their old home to their new home

Every Employee

- Sort records by type; discard non-records*
- Determine which records should be destroyed, kept, or transferred (use schedules on back plus your agency schedules)
- Contact your records officer with questions

Transfer inactive paper records to State Records Center/Archives

- Sort records into archival boxes, one type of record (series) per box
- Create an inventory for each box. Put one copy in the box; give one copy to your records officer
- Label each box
- Partner with your records officer to transfer boxes

**Non-records include personal notes, junk mail, reference materials, professional literature, duplicate copies, etc.*



division of
Archives and
Records Service

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How Long Should I Keep ...

Agency Programs & History

	Retention (keep records this long)	Disposition (then do this)	GRS No.
Agency history records	Until need ends	Transfer to State Archives	(GRS-1723)
Program and policy development records	3 years after final action	Transfer to State Archives	(GRS-1717)

Budget, Finance, Payroll, Purchasing

Accounts payable and receivable	7 years	Destroy	(GRS-1854)
Budget records	4 years	Destroy	(GRS-1856)
Payroll	3 years	Destroy	(GRS-1903)
Purchase orders and requisition records	4 years	Destroy	(GRS-1544)

Contracts & Grants

Contract records	7 years after expiration	Destroy	(GRS-1731)
Grant records	7 years after final action	Destroy	(GRS-1859)

Correspondence

Executive correspondence	5 years after separation	Transfer to State Archives	(GRS-1758)
Routine administrative correspondence	7 years	Destroy	(GRS-48)
Transitory correspondence	Until resolution of issue	Destroy	(GRS-1759)

Meetings

Closed meeting records	3 years	Transfer to State Archives	(GRS-1710)
Executive internal committee records	Until need ends	Transfer to State Archives	(GRS-1726)
Internal committee records	Until resolution of issue	Destroy	(GRS-1725)
Open meeting minutes & public materials	3 years	Transfer to State Archives	(GRS-1709)
Open meeting recordings	3 years	Destroy	(GRS-1712)

Public Relations

Public relations records	Until need ends	Transfer to State Archives	(GRS-1716)
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Reports & Publications

Annual or official reports	Upon publication	Transfer to State Archives	(GRS-3)
Publications	Upon publication	Transfer to State Archives	(GRS-1678)

Be on the lookout for records about...

- underrepresented communities
- natural disasters
- land/water use
- anything over 100 years old
- executive correspondence & decision-making
- policy/program creation & revision
- open meeting minutes & materials

These are permanent records: please send to State Archives!

Can you get rid of paper copies of digitized records?

- Send paper copies of **permanent** records to the State Archives, even if they've been digitized
- You may destroy paper copies of **non-permanent** digitized records