



**UTAH STATE ARCHIVES
RESOURCES TO HELP
YOU WITH YOUR MOVE**

RIM SPECIALISTS

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- **GENERAL RIM** *NOT SURE? NO WORRIES!*
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RIM SPECIALISTS

FINDING RETENTION SCHEDULES



contact info:
archives.utah.gov/rim/records-analysts.html

RIM SPECIALISTS IN-AGENCY TRAINING

contact info:
archives.utah.gov/rim/records-analysts.html



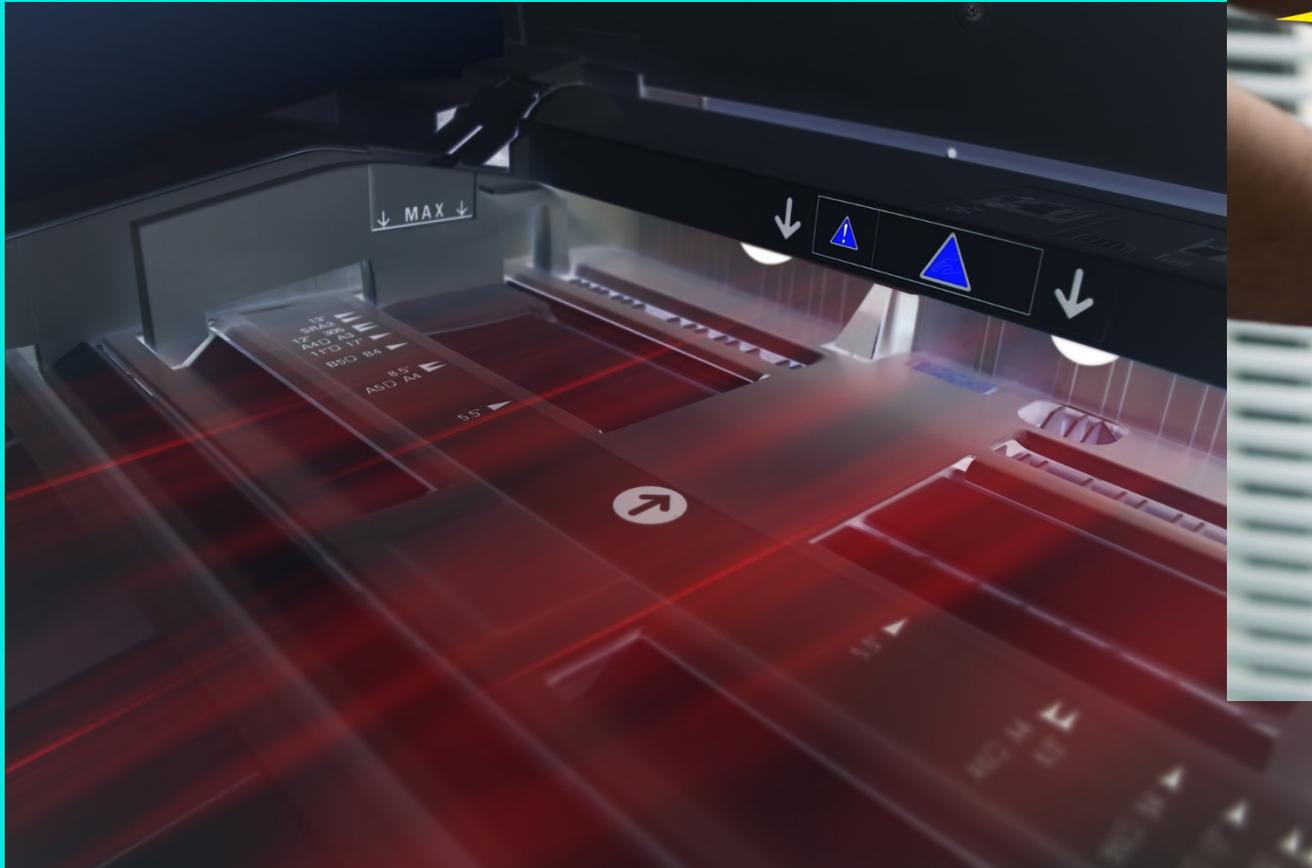
RECORDS CENTER

FREE STORAGE!



RECORDS CENTER

SCAN ON DEMAND



learn more online:
[archives.utah.gov/rim/
scanondemand.html](https://archives.utah.gov/rim/scanondemand.html)

MOVING GUIDE FLYER

FOR EVERYONE

available online:
archives.utah.gov/rim/pac-up.pdf



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

Records Officers

- Read the records officer moving guide available at go.usa.gov/xymdC
- Be a resource for your agency
- Contact the State Archives with any questions

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



Move your "active" 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

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

Transfer inactive 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.



Utah State Archives RIM Consultation Program © 2019
 801-531-3863 | recordsmanagement@utah.gov

How Long Should I Keep ...

Agency Programs & History	Retention (keep records)		
Agency history records	Until need ends		
Program and policy development records	3 years after final		
Budget, Finance, Payroll, Purchasing			
Accounts payable and receivable	7 years	Destroy	
Budget records	4 years	Destroy	
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	3 years	Destroy	(GRS-1760)
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)
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

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

These are permanent records: please send to State Archives!

MOVING GUIDE BOOKLET

FOR RECORDS OFFICERS

available online:
archives.utah.gov/rim/moving-guide.pdf



A Records Management Moving Guide for Records Officers

Created by the Utah Division of Archives and Records Service, 2019

Step 1. Inventory your records

Create an inventory to track all information assets. Your inventory may be as detailed or as simple as you like. See page 14 and archives.utah.gov/rim/templates.html for sample inventory sheets.

What to inventory

- Records in employees' offices
- Records in common office areas, closets, bookshelves, and file cabinets
- Non-records which must be moved, such as reference materials

What information to capture

- Name/type of record (record series)
- Record location
- Retention period (if known) and disposition (keep or destroy)
- Potential restricted information in the records
- Contact person or records custodian

Determining retention for records

Each record follows a retention schedule stating how long a record should be kept. To find a retention schedule:

Sample Inventory Sheets

Pre-move inventory

Record Name/Type	Description	Location
Vendor Contracts	Contracts with computer vendors for system upgrades	File cabinet storage

Box inventory sheet

Place a copy of this sheet in each box going to the State Archives Center or State Archives, and keep a copy for reference.

Box Number	Box Dates	Series Number	Series Name
M2019-3	2015-2019	64562	Vendor Contr

Boxes transferred

Box Number	Box Dates	Series Number	Series Name
M2019-3	2015-2019	64562	Vendor Contr

Destruction log

Date of Destruction	Legal Authority (Series Number or General Retention Schedule)	Series Title / Record Description
8/7/20	64562	Vendor Contr

Templates available online at archives.utah.gov/rim/templates.html

General Retention Schedule

Agency Programs & History

Record Name/Type	Retention	Disposition
Agency history records	Until need ends	Transfer to State Archives
Program and policy development records	3 years after final action	Transfer to State Archives

Budget, Finance, Payroll, Purchasing

Record Name/Type	Retention	Disposition
Accounts payable and receivable	7 years	Destroy (G)
Budget records	4 years	Destroy (G)
Payroll	3 years	Destroy (G)
Purchase orders and requisition records	4 years	Destroy (G)

Contracts & Grants

Record Name/Type	Retention	Disposition
Contract records	7 years after expiration	Destroy (G)
Grant records	7 years after final action	Destroy (G)

Correspondence

Record Name/Type	Retention	Disposition
Executive correspondence	5 years after separation	Transfer to State Archives (G)
Routine administrative correspondence	3 years	Destroy (G)
Transitory correspondence	Until resolution of issue	Destroy (G)

Transfer Boxes to the Records Center

Call 801-263-3423 and create item #285052 (\$2.43 per box); you'll need to provide your state contract (NASPO) account number, or create an account

Prepare boxes

- Remove records from binders and hanging files and put them in manila folders
- Put an inventory sheet inside each box and keep a copy for your agency's reference
- Don't overfill! Lid should fit snugly and be taped securely to the box
- Write a box number and other info directly on the box with thick, black permanent marker

Submit form

- Fill out the transfer form at go.usa.gov/xEAhz. You'll need to know your record series number, box numbers, and date range of the records
- The Records Center will contact you to coordinate shipment of the boxes

Send boxes

- Send boxes to the Records Center
 - Via mail: Utah State Records Center, PO Box 141029, Salt Lake City, UT 84114
 - In person (by arrangement): Building C-6, 5th St. & C St., Clearfield, UT 84015
- All boxes submitted on one transfer sheet must arrive together in one shipment

Full instructions at archives.utah.gov/rim/transferring-records.html

Questions? 801-525-3020 Records Center
801-531-3863 RIM Specialists

DON'T WAIT!





**CALL
TODAY!**

RIM SPECIALISTS

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recordscenter@utah.gov 801-525-3020

RESOURCES

- ***MOVING FLYER FOR EVERYONE***
<https://archives.utah.gov/rim/pac-up.pdf>
- ***MOVING BOOKLET FOR RECORDS OFFICERS***
<https://archives.utah.gov/rim/moving-guide.pdf>
- ***SAMPLE LOG/INVENTORY TEMPLATES***
<https://archives.utah.gov/rim/templates.html>
- ***RECORDS CENTER TRANSFERS - QUICK-REFERENCE CARD***
<https://archives.utah.gov/rim/rc-infocard.pdf>
- ***RECORDS CENTER***
<https://archives.utah.gov/rim/records-storage.html>
- ***SCAN-ON-DEMAND***
<https://archives.utah.gov/rim/scanondemand.html>

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