



TIME TO PAC UP

Records Management Moving Guide

Chief Administrative Officers

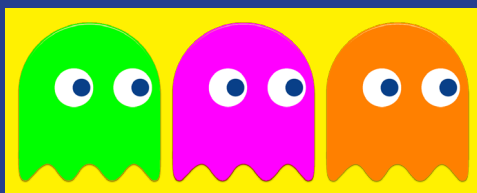
- Allow time for employees to manage their records
- Have your records officer invite State Archives to give a brief training during your staff meeting
- Allocate resources for boxes and other supplies
- Arrange sufficient record-shredding services with a reputable shredding company
- Contact your records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

Paper copies of records

- Send paper copies of **permanent** records to State Archives
- You may destroy paper copies of **non-permanent** record
- Keep a log of records you destroy

Records Officers

- Read the records officer moving guide available at bit.ly/4wtSPU2
- Be a resource for your agency and help coordinate details
- Contact State Archives with any questions



Keep an eye out for permanent records about...

- Underrepresented communities
- Natural disasters, land/water use
- Executive correspondence & decision-making
- Policy/program creation & revision
- Open meeting minutes/materials
- Anything older than 100 years

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

Coordinate moving paper records

- Clearly label boxes
- Keep track of what records are in each box, when they were moved, and by whom
- Move boxes securely
- Follow transfer procedures for records going to the State Records Center or State Archives:
bit.ly/4eBoYD0

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



Division of Archives
& Records Service

Utah State Archives RIM Consultation Program © 2026
801-531-3863 | recordsmanagement@utah.gov

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

Payroll	3 years	Destroy	GRS-1903
Accounts payable and receivable	7 years	Destroy	GRS-1854
Budget records	4 years	Destroy	GRS-1856
Purchase orders and requisition records	4 years	Destroy	GRS-1544
Reimbursement files	3 years	Destroy	GRS-1833

Contracts & Grants

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

Correspondence

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

Employee Performance

Performance plans and evaluations	3 years after separation	Destroy	GRS-1966
Employee & program productivity records	2 years after issue resolved	Destroy	GRS-1698
Employee training records	Until separation	Destroy	GRS-1916

Meetings

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

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