



# TIME TO PAC UP

## A Records Management Moving Guide for Records Officers



**Division of Archives  
& Records Service**

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# Greetings, Records Officer!

Congratulations on your upcoming move!

Moving offices is a lot of work, but the Utah Division of Archives and Records Service (State Archives) is here to help!

Our records and information management (RIM) specialists can help you with:

- In-agency training on sorting and boxing records
- Updating retention schedules and record series data
- On-site or remote assistance on packing day to help find retention schedules

To find your State Archives RIM specialist, visit [archives.utah.gov/records/get-help](https://archives.utah.gov/records/get-help)

Or contact our general line at 801-531-3863 or [recordsmanagement@utah.gov](mailto:recordsmanagement@utah.gov)

The following pages present one approach to managing your records through the move. As you plan and prepare, work with your Chief Administrative Officer and other stakeholders to create a plan tailored to your own agency's timeline, personnel, and specific needs.

# Step 1: Plan

## 1. Identify areas impacted by the move

- Sections, offices, cubicles, common rooms

## 2. Define responsibilities for each area

- Who will go through the records and inventory them?
- Who will box up the records?
- Who will transport the records to their new home and/or send records to the State Records Center?

## 3. Map out key target dates

- When to train staff on individual responsibilities
- When to review, organize, and box up or destroy records
- When to move records to the new office

## 4. Get familiar with your record series

You are the expert on your agency's records series! Find them at [archives.utah.gov/rc-list](https://archives.utah.gov/rc-list)

Each record series includes its own retention schedule. Your State Archives RIM specialist can help update series retention schedules as needed.

General retention schedules may be found at [axaemarchives.utah.gov/solr/axaem/GRSItem](https://axaemarchives.utah.gov/solr/axaem/GRSItem).

## Step 2: Train

Coordinate with management and staff to communicate deadlines and individual responsibilities.

- Communicate, communicate, communicate! Send emails and schedule meetings to review progress and answer questions
- Clearly communicate deadlines, team leaders, and responsibilities
- Give a demonstration during staff meeting for sorting and boxing records
- Post instructions and State Archives' [Time To Pac Up](#) flyer in common spaces and restrooms
- Share inventories and related records as needed so everyone who needs access has access
- Hold a record-sorting party, a boxing party, and/or a destruction party

Scheduling dedicated time for employees to pack up records will help everyone get the work done! You may want to coordinate with other divisions/departments in your building, and/or order additional shredding bins or records destruction services.

## Step 3: Prepare Records & Move

Follow the plan you created in step 1, adjusting as needed. Keep communication open.

Use the information on the following pages to answer common questions.

Your State Archives RIM specialist is available to help! [Contact your RIM specialist](#) if you would like to have a RIM specialist on hand to answer questions during sorting, destruction, or packing day.

# Online Resources

## General retention schedules

[axaemarchives.utah.gov/solr/axaem/GRSItem](http://axaemarchives.utah.gov/solr/axaem/GRSItem)

## Agency record series

[archives.utah.gov/rc-list](http://archives.utah.gov/rc-list)

## Transfer instructions

[archives.utah.gov/records/transfer-or-recall-records/  
transfer-instructions](http://archives.utah.gov/records/transfer-or-recall-records/transfer-instructions)

## Transfer form

[archives.utah.gov/records/transfer-or-recall-records/  
records-transfer-request-form](http://archives.utah.gov/records/transfer-or-recall-records/records-transfer-request-form)

## Inventory templates

[archives.utah.gov/knowledge-base/where-can-i-find-  
templates](http://archives.utah.gov/knowledge-base/where-can-i-find-templates)

## State Archives RIM specialists

[archives.utah.gov/records/get-help](http://archives.utah.gov/records/get-help)

## Agency general retention schedules\*

[archives.utah.gov/agency-grs/](http://archives.utah.gov/agency-grs/)

*\*Applicable only to USBE, Commerce, Corrections, GovOps, DHHS, DPS, UDOT, and DWS*

# Records inventory

Create an inventory to track your records throughout the move. See [archives.utah.gov/knowledge-base/where-can-i-find-templates](https://archives.utah.gov/knowledge-base/where-can-i-find-templates) for sample inventory sheets.

## What to inventory

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

## What information to capture

- Name/type of record (record series)
- Record location—in the old office and the new office
- Potential restricted information in the records
- Contact person or records custodian

Boxes going to the Records Center or State Archives will also require a detailed inventory placed inside each box (see pages 12–13).

# Sorting records

- Sort records by record type (record series)
- Use the retention schedules from step 1 to determine which records may be destroyed and which should be kept

Check your record series for details on when to send records to the Records Center. Your State Archives RIM specialist can help update your format management plans as needed

## Records vs. non-records

Not everything is a record!

Separate records from non-records, since non-records don't need to follow a retention schedule:

- A **record** means any documentary material (like correspondence, paper, maps, plans, photographs, recordings, digital files, etc.) that is prepared, owned, received or retained by your agency. See [Utah Code 63G-2-103\(25\)](#) for more details
- Some common non-records include personal notes, junk mail, vendor catalogs, temporary drafts that haven't been distributed, and daily calendars

## Duplicate records

Each agency is responsible for deciding which document or file is the official record (also known as “record copy”).

- A digital record can be the official record
- A copy of the original can be the official record

Whatever you decide, the official record needs to follow the retention schedule. Other copies should not be kept longer than the official record.

## Digitized records

If your digitized records are permanent, please send the original paper copies to State Archives.

You may destroy non-permanent paper originals or copies if they have been successfully digitized.

# Records to watch for

Keep an eye out for records which document these topics; these records are typically permanent:

- Civil rights
- Rights of citizens
- Law enforcement and major crime
- Military action and service
- Documentation of underrepresented communities
- Immigration
- Education trends
- Environment and pollution
- Land use
- Water use
- Disasters and disaster response
- Utah's Territorial era
- Anything over 100 years old

If you find these or other records which may be historically valuable, please contact your RIM specialist.

# Records going to the new office

Keep track of boxes as they are moved.

For each box, you should know:

- Where the records came from in the old office and where they're headed in the new office
- Who is in charge of the records
- When the box was moved, and by whom

Records which may contain information that is not public should be securely transferred by authorized individuals.

# Packing boxes to transfer to the State Records Center or State Archives

Pack boxes according to State Archives standards. See full instructions online at [archives.utah.gov/records/transfer-or-recall-records/transfer-instructions/](https://archives.utah.gov/records/transfer-or-recall-records/transfer-instructions/)

- Use official Archives boxes (Office Depot item #285052). These boxes are designed specifically for Utah State Archives and are stronger than standard office boxes
- Pack **one series** to a box
- Use manila folders (not hanging folders)
- Staples and paper clips do not need to be removed
- Create an inventory sheet for the contents of each box
  - Include box number and folder names to help current and future employees find records in each box
  - See [archives.utah.gov/knowledge-base/where-can-i-find-templates](https://archives.utah.gov/knowledge-base/where-can-i-find-templates) for sample inventory sheets.
- Place a copy of the inventory sheet *in* the box, and keep a copy for your agency's reference
  - You'll also upload or link to the file inventories on the transfer form

# Records going to the Records Center or State Archives

Track the following information for each box that is transferred:

- Your box number
- Box destination (State Records Center or State Archives)
- Date the transfer form was submitted, and by whom
- Actual date box is sent

To transfer a box, submit an online transfer form at [archives.utah.gov/records/records-transfer-request-form](https://archives.utah.gov/records/records-transfer-request-form)

- Submit a new transfer form for each series
- Multiple boxes (from the same series) may be included on one transfer form

You'll receive an auto-confirmation email after submitting the form.

The State Records Center or State Archives will contact you after that to coordinate a time and method for you to deliver the boxes. Do NOT send boxes until you've received approval to do so.

# General Retention Schedules

## Agency Programs & History

Agency history records	Until need ends	Transfer to State Archives	<a href="#">GRS-1723</a>
Program and policy development records	3 years after final action	Transfer to State Archives	<a href="#">GRS-1717</a>

## Budget, Finance, Payroll, Purchasing

Payroll	3 years	Destroy	<a href="#">GRS-1903</a>
Accounts payable and receivable	7 years	Destroy	<a href="#">GRS-1854</a>
Budget records	4 years	Destroy	<a href="#">GRS-1856</a>
Purchase orders and requisition records	4 years	Destroy	<a href="#">GRS-1544</a>
Reimbursement files	3 years	Destroy	<a href="#">GRS-1833</a>

## Contracts & Grants

Contract records	7 years after expiration	Destroy	<a href="#">GRS-1731</a>
Grant records	7 years after final action	Destroy	<a href="#">GRS-1859</a>

## Correspondence

Routine administrative correspondence	7 years	Destroy	<a href="#">GRS-48</a>
Transitory correspondence	Until issue resolved	Destroy	<a href="#">GRS-1759</a>
Executive correspondence	5 years after separation	Transfer to State Archives	<a href="#">GRS-1758</a>

## Employee Performance

Performance plans and evaluations	3 years after separation	Destroy	<a href="#">GRS-1966</a>
Employee and program productivity records	2 years after issue resolved	Destroy	<a href="#">GRS-1698</a>
Employee training records	Until separation	Destroy	<a href="#">GRS-1916</a>

## Meetings

Open meeting minutes & public materials	3 years	Transfer to State Archives	<a href="#">GRS-1709</a>
Open meeting recordings	3 years	Destroy	<a href="#">GRS-1712</a>
Closed meeting records	3 years	Transfer to State Archives	<a href="#">GRS-1710</a>
Internal committee records	Until issue resolved	Destroy	<a href="#">GRS-1725</a>
Executive internal committee records	Until need ends	Transfer to State Archives	<a href="#">GRS-1726</a>

## Public Relations

Public relations records	Until need ends	Transfer to State Archives	<a href="#">GRS-1716</a>
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## Reports & Publications

Annual or official reports	Upon publication	Transfer to State Archives	<a href="#">GRS-3</a>
Publications	Upon publication	Transfer to State Archives	<a href="#">GRS-1678</a>

Visit [axaemarchives.utah.gov/solr/axaem/GRSItem](http://axaemarchives.utah.gov/solr/axaem/GRSItem) to view all general retention schedules.

For agency-specific GRSes visit [archives.utah.gov/agency-grs](http://archives.utah.gov/agency-grs)