

Records on the Move

Records Management Services
2015

Moving: An Opportunity to Clean House

Rule 1: Only move what is necessary

Rule 2: Only move records which are used
on a regular basis

A blue-tinted photograph of a vast ocean under a cloudy sky. The text is overlaid on the lower-left portion of the image.

Only Move What Is Necessary

CLEANING HOUSE

Which Records Should I Move?

Do not move inactive Records

Do not move Records which have past their retention requirement

Consult a Retention Schedule

- UW General Records Retention Schedule
- Departmental Records Retention Schedule

What is a Records Retention Schedule?

The primary source of retention requirements for records created and received by the UW

Provides the legal authority for the destruction of records

<http://f2.washington.edu/fm/recmgt/retentionschedules/gs/general>

Cleaning House

Identify the records maintained by your department---apply the appropriate Retention Schedule

If the records have met their retention period

*Records pertaining to ongoing or pending audits or judicial or public disclosure proceedings must not be destroyed until the issue is resolved

Recycle

Shred

Transfer to the UW Archives

Shredding or Recycling

Shredding

Contact db SecureShred
425.828.0808

Recycling

Contact UW Recycling

Request Services: Paper Cleanout Toter

http://www.washington.edu/facilities/building/recyclingandsolidwaste/request_forms

Sending Records to UW Archives

John Bolcer, UW Archivist
685-2352
jdbolcer@uw.edu

Records That Have Not Met Their Retention Period

Send the records you don't use on a regular basis to safe, secure, inactive storage at the **University Records Center**

Criteria For Sending Records to the University Records Center

1. Records must be on a State approved records retention schedule
2. There must be at least 6 months left on the retention period
3. Records must fit in a standard storage box (10"x12"x15") with a lid that fits securely
4. Boxes cannot weigh more than 35 pounds
5. Records must not be a biohazard
6. Records must not leak

Storing Records at the URC: Packing & Labeling Boxes

- Keep records with similar dates together
- Boxes should be at least half full
- Box lid must fit firmly--do not use hanging files or place binders on end
- Label one short side of the box using a sharpie -- do not attach labels, "Post-It Notes", or tape to the box

Storing Records: Storage Request Form

The Storage Request Form is available
on-line

<http://f2.washington.edu/fm/recmgt/urc/storagerequests>

Watch the Clock

Determine how long it will take to box-up the records for storage, shredding, or to be moved

If the records are being sent to the University Records Center or to the University Archives, build in time for pickup and approval of the storage request

If records are being shredded, build in time for in-office shredding or pickup by the shredding vendor

A blue-tinted photograph of a vast ocean under a cloudy sky. The text "RECORDS ON THE MOVE" is overlaid in white, bold, uppercase letters in the lower half of the image.

RECORDS ON THE MOVE

How Many Boxes Will I Need?

Only use Record Storage Cartons/Bankers Boxes for records being sent to the University Records Center or to the University Archives (10 X 12 X 15)



Vertical Cabinet = 2 boxes per drawer



Lateral Cabinet = 3 boxes per drawer

Any size box can be used for records being shredded or recycled

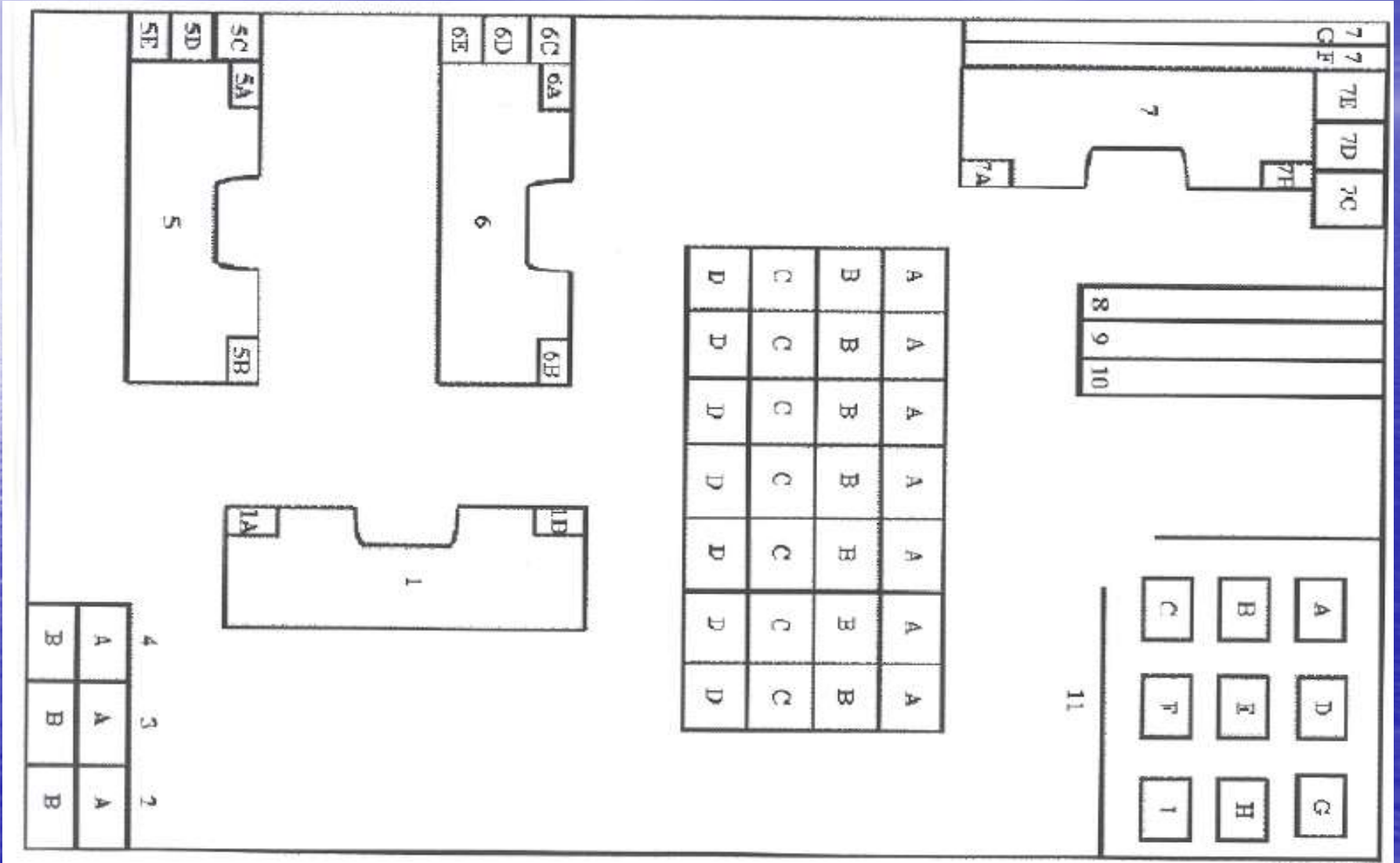
Map Out Your Space Pre-move And Post-move

- Determine the volume of records you will be moving into the new space and how much room you will have for them
 - Will you have enough room for all of them?
- Specifically where will each type of records go?
 - Will you be moving your filing cabinets?
 - Will there be room for all your filing cabinets?
 - Will you have to centralize files?
 - Will you have to decentralize files?

Packing Boxes: Map Out Your Space Pre-move

- Track your records through the move
 - Where are your records currently located?
 - Where will they go in your new space?
- Create a map of your office as it currently exists
 - Pack and label boxes in an orderly way according to the map
- Create a map of your new space
 - Determine where records will go **BEFORE** you move

Example of Map Diagram



Timeline: Packing Boxes

When is it feasible to pack the records that will be moved?

- How long can each type of record remain inaccessible?
- How soon will you need it after the move?

Note to self: last to pack, first to unpack

Pack Boxes

- Pack boxes by type of record
- Use a sharpie to identify the box, do not use labels other than those provided by the movers
- Create a list of all the boxes, noting their contents

Reminder: Use boxes that are 10 X 12 X 15 or boxes provided by the movers

Label Boxes

Basic Label

- Budget Records
- Box 1 of 5

More Detailed Label

- Budget Records
- Drawer 6C
- Box 1 of 5

Very Detailed Label

- Records Mgmt
- Budget Records
- Drawer 6 C
- Box 1 of 5

After The Move, Inventory The Boxes And Unpack

- Make sure all the boxes arrived at your new office safely
Do not put this off!
- Sort boxes by type of record
- Unpack by type of record
- Begin with the type of record that is used most often
- Check off each box on your list as the records are filed

Now Relax And Enjoy Your New Home

And call Records Management Services to
pick up the records you don't have room
for...

Records Management Services

<http://f2.washington.edu/fm/recmgt/>

Barbara Benson

bbenson@uw.edu

543-7950

Cara Ball

ballc2@uw.edu

543-6512

Albert Ybarra

aybarra@uw.edu

543-0573