Tips for Managing Records during an Office Relocation

In any office relocation, your must carefully consider how to handle your records. It is very important that you begin planning for transfer, relocation, and/or disposition of the records well ahead of time.

Please be aware that pursuant to CGS §1-240(a) and §53-153, it is either a class A misdemeanor or felony to destroy, mutilate or otherwise dispose of any public record without first receiving authorization from our office.

There are several steps that can make relocation more efficient from a records management standpoint:

a. Contact your Records Management Liaison Officer (RMLO) for assistance in this process.

b. Conduct an inventory to determine where your records are located. Remember to consider possible storage areas beyond your immediate physical area, e.g. attics, basements, and other out-of-the way areas. A sample records inventory form is available on the Office of the Public Records Administrator website for your reference.

c. E-mail and electronic records must be a part of the records inventory. Although hard copies are the primary concern during the move, attention should be paid to eliminate all duplicates and non-record material, regardless of format. Agencies should only be retaining the official record copy. Reference the OPRA General Letter 2009-2: *Management and Retention of E-mail and other Electronic Messages* for additional guidance.

d. Once you've created the list, identify any non-record items. Some examples of non-records are extra (duplicate) copies, reference materials, publications not related to agency business, and blank forms. You can immediately dispose of items that are non-records. If you are unsure if an item is a non-record, contact your agency RMLO prior to disposing of the record.

e. For the remaining records, consult the records retention schedules. Records retention schedules are available online.

    a. There are two types of schedules. General Schedules include records commonly used and created by most agencies. Agency specific schedules list records unique to individual agencies.

    b. Please note that only agency specific retention schedules created or revised after July 1, 2007 are posted online. Records retention schedules with an effective dates prior to July 1, 2007 are on file with the Office of the Public Records Administrator. Your agency RMLO and Assistant RMLO should have copies of all active retention schedules for your agency.

f. Contact your RMLO to discuss destroying records that have met the minimum retention period by submitting a *Records Disposition Authorization* (Form RC-108), available online.

g. If you have inactive records not eligible for disposition contact your RMLO to discuss the option of using an off-site records storage facility, such as the State Records Center.

h. If you have records with a retention period of "Permanent / Archival", contact your RMLO to discuss transferring the records to the Connecticut State Archives or an approved archival repository.