

## Task: Moving or Transferring Records

### ***Objective***

At the end of this module, the participant will be able to identify records for storage or destruction, and transfer those records from the office environment to the Records Management Department.

### ***Background Information***

An **HCC Record** is defined as anything created or received by an HCC employee in the transaction of public business on government time or using government resources. This record could be in any medium such as paper, letter, book, map, photograph, sound, video, microfilm, magnetic tape, or electronic. This does not include convenience copies, copies of documents furnished to the public or blank forms/stocks of publications.

**Active Record** is any record accessed 3 or more times per month. This record should remain in the work area until it becomes inactive.

**Inactive Record** is any record accessed less than 3 times per month. This record can be transferred to Records Management for proper retention or destruction.

**Permanent Records** have historical, administrative or research value to the College and are kept indefinitely. These records need to be transferred to Records Management for proper retention. Examples are student transcripts, administrative meeting minutes, contracts, and leases.

**Retention Schedule** describes the types of data or record series that exist within HCC, and lists the minimum length of time these items must be retained in order to comply with state or federal laws, statutes, or judicial rulings, or recognized industry best practices.

**Records Inventory** identifies what kinds of records are created or received in a particular area. It describes the function, content, use and format of each records series.

The only records to be destroyed are those original records that have met their retention date, or those copies of documents kept only for convenience or reference.

## Downloadable Documents

### Navigation:

From HCC home page at <http://www.hccs.edu>

- > Faculty & Staff
- > Records Management (under Employee Support)
- > Select from the following (under Forms):

- [Inventory Form](#)
- [Record/Box Transfer Form](#)
- [Record Destruction Form](#)

or

- > View **Retention Schedules**
  - [General Record Schedules](#)
  - [Office of International Students](#)
  - [Public Junior College Schedules](#)
  - [Public Safety Agency Schedules](#)
  - [Public School District Schedules](#)

## Process for Completing Task

1. All records should be boxed by type and separated by year. (Boxes for record storage or destruction can be requested from Records Management through the help desk at 713-718-8800.)
2. All records must be inventoried before being sent to Records Management.
3. A completed Records Management **Inventory Form** and Records Management **Box Transfer Form** must accompany all orders.
4. A **Record Destruction Form** is to be completed, in addition to the forms stated in step #3, if the box is being sent for destruction.
5. Check the **retention schedules** that govern the records to determine if they require storage or destruction, to get the record series number and proper record title. Please contact Records Management at 713-718-5151 if you have any questions.
6. Place a work order through the help desk at 713-718-8800 or by email to [customer.support@hccs.edu](mailto:customer.support@hccs.edu).
7. Records Management will make arrangements for the pick-up, transfer, and/or removal of all boxes of records upon completion of the above steps by the requesting department.

## Key Resource Persons

DISTRICT RECORDS MANAGEMENT DEPT.		<a href="mailto:records.management@hccs.edu">records.management@hccs.edu</a>
Lori Thames	Manager	713-718-5155
Cesar Villegas	Records Retention Technician	713-718-5593
Olivia Harris	Administrative Assistant	713-718-5151