

## **Moving? Get Ready!**

### **Review records and information**

Space is valuable and needs to be used to its best advantage.  
The steps below will help minimize the onsite storage space needed for paper records and allow more space to be used for people.

#### **Get records and documents ready for a move**

1. Identify the volume and type of paper records and/or documents that you and your team have onsite
2. Determine if they are official records, copies, or transitory documents (transitory documents are documents that only have value for a short period of time)
3. Copies and transitory documents can be disposed of when they are no longer needed for business purposes
4. Records need to be retained based on the UC Records Retention Schedule.
  - Think about how often the paper records that need to be kept are referenced
  - If they are referenced infrequently but need to be kept, offsite storage is a good option
5. Paper records that are referenced frequently may be good candidates for scanning and electronic storage.
6. If offsite storage or digitization and electronic records storage are needed, begin to think about budget for records storage
7. Need a vendor for offsite storage? Contact Carolyn or Brenda. There some very affordable options available
8. Looking for guidance of managing paper or electronic records? Contact Brenda or Carolyn

#### **Resources**

Brenda Gee – UCSF Records Coordinator – [Brenda.Gee@ucsf.edu](mailto:Brenda.Gee@ucsf.edu)

Carolyn Tuft – Document Management [Carolyn.Tuft@ucsf.edu](mailto:Carolyn.Tuft@ucsf.edu)

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