**Managing your records during an office move**

If you or your team are moving office, it is important to consider how this will affect your records. During an office move there is a risk that records could lose their filing order, could be damaged, could be lost completely, could be left behind, could be moved into insecure storage or that there could be a personal data breach. Preparation is key to getting control of the situation and mitigating these risks.

This guidance has been written by the Records Management Team (RMT) at the University and before we get into our advice for office moves, it's worth clarifying responsibilities around records management. Records are the responsibility of the departments, teams and individuals that create them, rather than the RMT. The RMT can provide advice, guidance and support regarding records management, but we are not currently in a position to manage your records for you. The University does not have a central records store, so the RMT also cannot store records for you. It is the responsibility of the department, team or individual that is moving to ensure that all their records are moved with them, destroyed or transferred to an archive as appropriate.

**Initial steps**  
It is important that you start preparing for your move as early as possible. A good first step could be creating a basic inventory of all the records in your office. While office moves will typically focus on paper records it is worth considering if the move may affect your digital records (for example, if any records are exclusively saved to computer hard drives, external hard drives, USB drives etc. which are kept in your office).

Try to find out as much as possible about your new office – if it is possible you should ask to see the office before the move, otherwise ask to see a room plan or photograph. You should consider how secure this new office is and if there is adequate storage space for records – in some circumstances you may want to request that filing cabinets are provided or moved from your current office. For some teams it may also be necessary to request separate additional storage space. If the office is not secure and will be used to store sensitive or personal records, you should request that a lock is installed. It is worth considering potential cost implications for the office move, such as purchasing boxes, filing cabinets, packaging or labels.

Some teams may want to create a plan or timeline for managing their records before, during and after the move. Start by working back from the moving date and allow time for delays. It may also be helpful to delegate these responsibilities to an individual within the team or to set up a specific working group.

If you have any concerns about your records regarding the move, please contact the RMT as soon as possible. If there are records in your office belonging to another department or team, please contact them directly or the RMT to ensure that these records are assessed.

**Assessing your records before the move**   
Before the move, you should assess as many of your records as possible to determine which records need to be reviewed, permanently retained and destroyed at the end of their retention periods according to the University [retention schedules](https://intranet.uwtsd.ac.uk/departments/library-and-learning-resources/llr-strategy-and-policies/records-management). If you have already created an inventory, you could update this while assessing the records to include information about retention periods and actions as well if any records have already been destroyed.

Some records will need to be retained for a certain period before they can be reviewed, permanently retained or destroyed – these records should be labelled with a description of the contents, covering dates, the date they need to be retained until and whether they will then be reviewed, permanently retained or destroyed. If you are re-using old boxes, make sure to cover up or remove any old labels.

If they need to be reviewed it means further assessment is needed (which could, for example, lead to an extension of the retention period) - please contact the RMT for further advice.

Some records need to be permanently retained often due to their historical value (these are listed as “archive” under the “action” column of the retention schedules). They might be transferred to the University Archives (either in Lampeter or Swansea). Please contact the Special Collections and Archives team for advice on if records hold archival value at [specialcollections@uwtsd.ac.uk](mailto:specialcollections@uwtsd.ac.uk).

Some records will need to be destroyed. Unless they are duplicates or personal records of no wider significance, a [records disposal form](https://intranet.uwtsd.ac.uk/departments/library-and-learning-resources/llr-strategy-and-policies/records-management) will need to be completed. If the records contain sensitive or personal information, they must be disposed of as confidential waste. Non-confidential paper records can be recycled. Further guidance on the disposal of records and confidential waste can be found in the [Confidential Waste Guidance Note](https://intranet.uwtsd.ac.uk/departments/estates-and-facilities/waste).

If you are unable to assess some of your records due to time constraints, just move them to your new office and assess them there.   
  
Before you leave your office, you should do a final walk around to make sure that nothing is left behind. It is important that no records are left in your old office unless they have clearly been labelled as waste or with instructions for them to be moved to another location. Please check in and around all the furniture in the office for hidden records. It may also be worth checking any storage areas that were previously used by your department or team to store records. It may not be possible to visit your old office, once you have moved.

**Moving your records**  
If Estates are moving your records, then it is important to provide them with clear instructions about what needs to be moved and where it needs to go. If you are concerned about the filing order of your records being lost, please let Estates know. Alongside raising a [maintenance ticket](https://quantarc.uwtsd.ac.uk/helpdesk/new-request/common-problem#) via the Hwb to move the items it may be helpful to print off instructions to leave in the office or to label the items directly (specifying if they need to be moved and, if so, where to). You could even arrange your old office to make moving the records easier. For example, you could use one corner for different forms of waste, another corner for what needs to be transferred to your new office and a third corner for material that needs to be transferred elsewhere (i.e. to an archive or to a records store). When raising a maintenance ticket, it is also helpful to provide photographs and give some idea of the amount of material that needs to be moved.

Once you have moved into your new office, you may be unable to access the records in your old office until they are moved. It is worth considering if this is likely to be a problem and taking steps to manage any issues this may cause. For example, you could complete certain tasks before the move, bring specific records with you when initially moving into the new office or ask Estates to prioritise the move.

**Managing your records after the move**  
If you created an inventory of records prior to your move, this could be used as a checklist to ensure that all of the records have arrived at your new office. If you have any concerns that records have been left behind, please contact Estates as soon as possible.

If any personal data is accidentally lost or destroyed during the move it may constitute a personal data breach. This will need to be reported to the Data Protection Officer who can be contacted at [foi@uwtsd.ac.uk](mailto:foi@uwtsd.ac.uk).

Once you have arranged your records logically and ensured they are securely stored, you should continue to assess any outstanding records.

It is important that you inform any relevant departments, teams, individuals or external bodies that you have moved office and of your new address so that no documents are sent to your old office.

**Contact details**  
Please direct any questions about recordkeeping and the retention of records to [records@uwtsd.ac.uk](mailto:records@uwtsd.ac.uk). Estates can be contacted at [operations@uwtsd.ac.uk](mailto:operations@uwtsd.ac.uk). For advice regarding Data Protection please contact [foi@uwtsd.ac.uk](mailto:foi@uwtsd.ac.uk).

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