



Tips For Office Clean Ups & Moves

Offices often view summer as a great time to schedule an office clean up day or carry out a project to clear out old files. Summer is also the prime season for office moves, which generally include packing and moving office files. Conducting an office clean out or moving into a new office space can be chaotic without the proper guidance. The following records management advice can help to minimize problems and ensure an efficient and effective project.

Plan ahead

- Contact Records Management Services (RMS) at archives_rms@harvard.edu or 495-5961 prior to your clean up for personalized assistance in planning your project.
- Review Harvard University's records management [policies](#).

Be aware of Harvard's policies about retaining and disposing of records

- Harvard has official policies on how long you must keep different kinds of records and their disposition, known as the [General Records Schedule \(GRS\)](#).
- Identify the kinds of records in your office and follow the retention and disposition guidelines in the GRS.
- If you are cleaning up your electronic files or your email, be aware that the GRS applies to records in electronic formats too.
- For help interpreting the GRS, contact us at archives_rms@harvard.edu or 495-5961.

Create an inventory of your records

- Records inventories are useful at any time to get a better understanding of what records an office has, but are especially useful in situations such as cleanup projects and office moves.
- Creating an inventory will help to identify which records are ready for destruction, which are good candidates for off-site storage, and which are eligible for transfer to the Archives.
- Inventories can be used to document the records that are being packed in boxes. This will assist you in unpacking and organizing your records in the new office.
- Use RMS' [inventory form](#) and [inventory instructions](#) for preparing an inventory of your office records.

Destroying records

- Shred records containing confidential information per [Harvard University's Enterprise Security Policy](#).
- Do not destroy any records pertaining to an investigation, litigation, audit, or program review in progress or if you know that one is about to be held. This is the case even if the retention period or disposition date specified for the records has already expired.
- Do not destroy any records that date from 1970 or before. Please contact Records Management Services to discuss whether the records should be transferred to the University Archives.
- Document records destruction using the [In-Office Destruction Documentation Form](#).

Storage options

- All Harvard offices may use the Records Center at the Harvard Depository for storing office records that are infrequently used. Using off-site storage frees up valuable office space and avoids the purchase of additional filing equipment.
- RMS assists offices with establishing records storage accounts, transferring records to the Records Center, and managing records stored at the Records Center. RMS also offers [workshops](#) on using the Records Center and managing your Records Center account.
- **Offices interested in sending records to storage will need to set up an account with RMS first. For information about records storage, see [Harvard University Offsite Records Storage](#).**

Permanent (archival) records

- Records that have historical value and may be appropriate for transfer to the University Archives are indicated in the [General Records Schedule](#) by the retention plans "contact archives," transfer to archives," and "retain permanently."
- For details about transferring records to the Archives, please view our [instructions](#).
- Please contact Records Management Services at 495-5961 to discuss arrangements to transfer records to the Harvard University Archives.

Moving your records

- As you prepare the records that are going to be moved to your new location, it is important to document what records are being moved, where they are being moved to, and who is responsible for the records. This will assist you in unpacking your records in the new office, and ensuring that records are not misplaced or abandoned.
- For each box, fill out the [Box Identification Form](#) and place inside the box. Retain a copy of the completed form for yourself.
- Label the outside of each box with owner's name, office name, name of records, and total number of boxes of that kind of record (e.g. Box 1 of 3, Box 2 of 3, etc.)
- Use the [Box Inventory Form](#) to list all of the boxes being moved. Once in the new space, use the box identification forms to check off boxes from the box inventory sheet to ensure that all of your records have arrived.

Post clean-up assessment

- If you clean up or move raises issues with your current recordkeeping practices or inspires you to reorganize your files for improved access and management, contact [Records Management Services](#) for professional assistance to address questions and concerns, recommend improvements, and to design recordkeeping solutions.