



RM *At-A-Glance*

Subject: Transferring Paper Records to the Federal Records Center (FRC)

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| <p>How do I know when my records are ready to be transferred off-site?</p> | <p>To determine if records that are no longer needed for current business should be moved to the FRC, review your office’s File Plan and the FHFA Comprehensive Records Schedule to confirm that the records are not within one year of the end of their retention period. And, obtain concurrence from the owner of the records, your Office Director, or his/her designee, that the records are no longer used for current business (i.e., they are inactive records) and can be transferred off-site.</p> |
| <p>How should I prepare the records for transfer?</p> | <p>Once you have identified a set of records that can be moved to the FRC, take the following steps to prepare the records for transfer:</p> <ul style="list-style-type: none"> • Request white records boxes from a Records and Information Management (RIM) staff person (see names and numbers below). • Separate the records into record series, or groups of records having the same disposition authority. Each record series (one box or more) is handled as a distinct transfer with one cutoff date or date range. As volume warrants, divide a record series further into separate transfers by year or date range. • Make sure all records are in folders with labels and dates for ease of retrieval. Remove all clips, binders, rubber bands, and mixed media (i.e., computer disks). Pack boxes leaving 1-2 inches of space for interfiling according to the directions on the records box. • In pencil, write the box number on the front of each records box in the space indicated. • Prepare a <i>Box Index of Records - Form 077</i> listing each folder in each box. • Place a copy of the box index in the last box of the records transfer. • E-mail a copy of the box index to the Records Officer who will assign a RIM staff member to complete the transfer paperwork (<i>Records Transmittal and Receipt - Form SF 135</i>). |
| <p>Who will pick up my records boxes?</p> | <p>Contact one of the following members of the RIM Program to pick up your records transfer:</p> <ul style="list-style-type: none"> • Karen Rogers, 202-649-3673 • Kimberly Hall, 202-649-3671 • Brigitte Tolbert, 202-649-3675 • Dawn Morton, 202-649-3672 |
| <p>Where can I find more information about Records Management?</p> | <p>Contact your office’s Records Liaison; contact a member of the Records and Information Management team by telephone or email: Karen Rogers at 202-649-3673 (karen.rogers@fhfa.gov) and Brigitte Tolbert at 202-649-3675 (brigitte.tolbert@fhfa.gov); or see the Records Management page on the Intranet.</p> |