

HARRIS COUNTY RECORDS CENTER
Records Transfer Instructions

Note: For detailed instructions refer to **Harris County Records Center Procedure #1, "Preparation of Records for Storage"**.

Packing

1. Screen records to ensure that only records that must be retained are sent to storage?
 - a. Remove duplicate copies of documents.
 - b. Remove unused (blank) forms or stationary and publications.
2. Pack records in containers that provide for convenience of access, efficiency and safety?
 - a. Use boxes for letter/legal size documents (Approximately 16"x12"x10.5"high).
 - b. Containers designed for storage of other files (e.g. checks and microfiche) must be approved by the County Records Manager prior to use.
3. Pack boxes as though they are file drawers and in a logical order (e.g. numerical or alphabetical).
 - a. All files shall face to the front of the box.
 - b. Leave approximately 1.5 inches in the container to allow for easy servicing.
 - c. Do not include files with different retention periods in the same box.

**NOTE: Boxes in the following condition will not be picked up by the Records Center:
Boxes that are torn, overstuffed, bulging, labeled incorrectly or are not sealed with a seated lid.**

Identification Marking

1. Assign each box a unique, **consecutive** number starting where you left off last time.
 - a. Use the same numbering system consistently for each series.
 - b. Coordinate with other records liaisons in your office to ensure that you are not using the same box numbers.
 - c. Include the full box number on the Records Storage Form including any alpha prefixes, e.g. CR-101, HR-PAY-101, TSB-101.
2. Label each box on the short side (front) in the following manner.
 - a. Name of the Office of Record
 - b. Name of the Section within the Office of Record (If applicable)
 - c. Box Number (as determined in item 1 of this section)
 - d. And, **Date** (i.e. 06-07-1986) last file was completed or closed out?
 - e. If needed, include a detailed list of contents or confidentiality statement in the box (e.g. HIPAA).

Transfer Agreements

1. Complete Record Center **Form 299-002, Records Center Storage Form**.
 - a. Include the name of the Office of Record/section on the "OFFICE" line.
 - b. Place the number of each box in the "BOX NUMBER" column.
 - c. Include a short description of contents in the "CONTENT" column. You may need to include the **date** the last file was completed or closed out.
2. Fax the completed form to the Records Center to schedule an inspection of the records and subsequent pick up.

PLEASE DO NOT FAX (713-924-4126) LIST UNLESS THE BOXES ARE COMPLETE AND READY FOR PICKUP.