University of Pittsburgh
University Records Management
FAQ

Below are frequently asked questions concerning records services available to University of Pittsburgh departments and offices. Should you have any additional questions or concerns, please contact the University Records Management office.

How do I sign-up for a Business Records Management (BRM) account?

Contact the University Records Manager to initiate the process. You will need to complete a few forms and provide your departmental account number. Also, you will need to attend a mandatory training session with University Records Management. This session will take place in your office and typically lasts between 20-40 minutes. Your office will then be provided with all of the necessary information, forms, and manuals to utilize the services provided through BRM.

What are the costs associated with using University Records Management for records-related services?

At this time, the only cost University departments incur is for any box purchases made from BRM. All storage and service-related fees are covered through the University Records Management program and are not transferred to departments.

Where do we get boxes to store our materials?

Once you have an account established with BRM, you may order boxes directly from their company and have the items delivered to your office by using BRM's "Supply Order Form." The current price guide for boxes at BRM is available here. It is recommended that you use the standard letter and legal box (1.2 cubic feet) for storage purposes.

How long do I need to keep my records?

The retention period of records depends on the record type in question. You should consult the University's two approved retention schedules for the exact period of time you must retain your records. Within both schedules, records are listed by type and the pertinent retention period is listed next to the applicable record.

Please be advised that the schedules cover a broad range of records that are common to most offices at the University of Pittsburgh. However, general schedules do not claim to be inclusive of every record that all departments and offices create. Records that are not listed on general schedules should not be destroyed without the authorization of the University Records Management program. If you find that your office produces records not listed within the general schedule, please contact the Records Manager for assistance.

How do I send and retrieve boxes from BRM?

This topic is covered in-depth during training sessions provided by University Records Management. Once your account is established you will be given forms to use for a pick-up or delivery. Only authorized users for an account may place an order for service. In all instances, you'll also need to have your account number, name and pass code (if applicable) available.

In order to place a pick-up of new boxes going to BRM, you must have all containers barcoded and a "Records Storage Form – New Box Submissions" sheet completed for all items being sent to storage. You will then need to submit the transmittal form in advance to BRM via email or fax. Submission of a completed and accurate transmittal form will initiate a pick-up of your boxes from your location.

To retrieve items from BRM, you need to complete BRM's "Box Retrieval and Box Return Request Form."   On the form, you must provide BRM with the barcode number of the container you wish to have delivered to your office. The form should be submitted in advance to BRM via email or fax.

Where will my records be stored?
BRM has three local off-site storage facilities. The majority of the University's records are stored at their North Side or East Liberty locations. Regardless of what facility your records are being stored, the same delivery schedule applies to offices located in the Oakland campus.

How do I amend my authorized user list for my BRM account?
All requests to modify (add/delete) authorized users for your account must be requested using BRM's "Access Authorization" form. Departments should maintain a copy of this document on hand for their account. If you are in need of a copy of this form, please contact the Records Manager. To prevent unauthorized access, please be advised that it is the department's responsibility to remove any individuals no longer associated with their respective office as a user from their account.

Where do I get additional barcode labels for my account?
You must complete BRM's "Supply Order Form" and submit it to their company via fax or email. Please note that all labels are pre-assigned to your particular account. Therefore, labels should <u>not</u> be shared with other offices that do not have the same department/cost center number as you.

How can I obtain a copy of my current inventory of items being stored at BRM?
Please call or email the University Records Management office for this information. We can provide an up-to-date listing of all items in your respective storage account at BRM for free of charge. Please note that if you call BRM for this information, the University is charged for your report. Therefore, please call the Records Manager for primary assistance.

What will happen to my records once the review/destroy date of items at BRM has been reached?
The University Records Management office receives a monthly report for all items due for destruction at BRM. This report is then broken down by department and two forms are sent to the primary contact for the respective account. You will be asked to make a

decision about the status of all boxes/files due for destruction. We will not destroy any records without the department's written consent.

How do I extend the review/destroy date of my items in storage?
Occasionally, departments need to retain records beyond the period of time originally specified. Please see the instructions on the University Records Management home page for making an extension request.

Our department wishes to track our records by the file, rather than at a box-level description. How can we accomplish this?
BRM offers file-level description for items sent to storage. You will have to obtain file barcode labels from BRM and then complete a file-level transmittal sheet. Additionally, you will need to obtain yellow barcode stickers to place on the boxes in which your files will be stored (as opposed to the white barcode labels typically used). In this case, you are going to index each filefolder within a box by providing a description and review/destroy date.

What should I do about any special projects that arise in relation to records storage, retention and disposition?
Please call the University Records Management office in advance of your project, as we can assist your unit in these situations. There are various solutions available to meet the needs of large-scale projects, such as using conference room space at BRM, large order pick-ups/deliveries, modifying data already submitted to BRM, etc.

In addition, please be advised that any request to service over 40 boxes per pick-up/delivery or any service request at an off-campus location must be approved by the University Records Management program in advance of placing the order with BRM.

What are my options for shredding University records?
There are two options available to University offices for shredding records located in their offices. Please review the "Records destruction" overview on the records management home page. This service is available at no-cost to University departments.

What do I need to do if my records require review by the University Archives?
Prior to submitting items to the University Archives, please carefully examine the procedure for which records can be sent to the archives - Procedure for sending records to the University Archives. Records that should be sent to the University Archives will first require an electronic copy of the contents list for all respective boxes, University Archives Transmittal Form. This information should be emailed to Zach Brodt, University Archivist (zlb2@pitt.edu or telephone 412-648-3148). Upon review of this material, your office will be contacted by a member of the Archives Service Center for further instruction regarding your containers. Please do not send or transfer items to the archives without prior approval from the University Archivist. *Please note that any records or artifacts pre-dating 1970 require review by the University Archivist.*