

# University of Connecticut

## User Move Guide

## UConn User Move Guide

### Table of Contents

UPDC Introduction .....	3
Move Process Overview .....	4
Move Preparation Checklist .....	5
Move Coordinators.....	6
Preparing Office and Administrative Space.....	6
General Move Instructions .....	7
Packing Instructions.....	8
Labeling Instructions .....	12
Files & Records Management Instructions .....	14
Check-Out Process .....	18
Appendix A: Post Move Report Form .....	19
Appendix B: Move Checkout Inventory Form .....	20
Appendix C: ACT 39 Surplus FORM Sample .....	21
Appendix D: Existing Equipment Inventory Template.....	23
Appendix E: Operational Interview Questionnaire.....	24
Appendix F: Better World of Books Criteria.....	28
Appendix G: EH&S, Laboratory Forms & Procedures.....	29

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## INTRODUCTION

Enclosed for your review is a comprehensive User Move Guide which will provide details and tips to help you prepare for your move.

Our move vendor has a great deal of experience with Higher Education Moves & Equipment Relocations and will provide the packing and moving services in support of the project.

Any move can be unsettling. The goal is to make the process simple and efficient in order to allow you and your group to settle into your new space as quickly as possible. It is important to remember that this document serves as a general guide and will answer the majority of questions that you may have concerning your role in the move. Please contact your Move Coordinator with any specific questions.

There will be a great deal of activity prior to and during the move. The Move Coordinators (MC) will work closely with the UConn UPDC Move Team to determine how you can be of assistance during the process. This could include providing packing assistance, being present at some time during the move, or remaining out of the main move activity area to ensure the movers the space needed to efficiently carry out your relocation.

Once again, thank you for the vital role you have taken in ensuring a smooth and successful move.

Respectfully,

**University Planning, Design & Construction (UPDC)**

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## **MOVE PROCESS OVERVIEW**

### **WHAT TO EXPECT**

#### **9 Months Prior to Move**

Submit Move Initiation Form to UPDC  
Move Coordinator Kickoff/Walkthrough  
Master Move Timeline & Construction Schedule Overview  
Inventory Confidential Records  
Inventory Chemicals/Engage EH&S  
Identify key upcoming Academic Programs/Events

#### **6 Months Prior to Move**

Dept. Operational Interviews  
Begin purging files & storage (Ongoing)  
ACT 39 Process for unwanted items (Ongoing)  
Dept. Move Coordinator Meetings (Ongoing)  
Perform Existing Equipment Inventory  
Room Assignments/Phone Transfer Matrix Due  
Distribute Move Guide

#### **3 Months Prior to Move**

Finalize Move Schedule  
IT Inventory  
Notify Leased Equipment Vendors

#### **1 Month Prior to the Move**

Crate/Box Packing Supply Delivery  
Review Detailed Move Activities

#### **Week 2 Prior to the Move**

Remove all personal items until move is complete.  
Staff Packing Begins

#### **Week 1 Prior to the Move**

Pre-Move Move Coordinator Walkthrough  
Begin packing and labeling non-essential items  
Continue packing non-essential items

#### **DAY BEFORE MOVE**

Ensure that all devices + IT components are labeled (\*All PC disconnects/reconnects by User)  
Take last minute personal belongings home with you

**ALL PACKING COMPLETED BY CLOSE OF BUSINESS**

#### **MOVE DAY**

All move contents to be moved on Move Day  
Collect all existing phones  
Collect Inventory Checkout Forms

#### **POST MOVE**

Complete Post Move Forms  
Move Coordinator Final Checkout  
Final Building Cleanout  
IT Troubleshooting Visit



# MOVE PREPARATION CHECK LIST

## Have you ....?

- ✓ Notified your contacts of your new location and phone number
- ✓ Setup your phone away message stating your office is moving. NOTE: You can access your voice mail from any telephone. Dial 6-5555 (on-campus) or 860-486-5555 (off-campus) and follow the prompts.
- ✓ Taken all personal items and plants home
- ✓ Emptied all desks, credenzas, bookcases and top two drawers of file cabinets
- ✓ Inserted identification in each box in case the label falls off
- ✓ Followed IT Preparation Instructions including disconnecting computers & phones.
- ✓ Labeled everything that you need relocated? Remember if it is not labeled, it will not move.
- ✓ Filled out an extra sheet of labels and placed equipment peripheral bag(s) on your desk
- ✓ Attached a label to the short end of all move contents(boxes/furniture items)
- ✓ Completed an Inventory Checkout Form for each location to which you are moving items and have it reviewed and verified by your Move Coordinator

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## MOVE COORDINATORS (MC)

All departments have been assigned a representative to coordinate between the Move Logistics Team and the department staff. This representative, referred to in this move handbook as a Move Coordinator (MC), will also be responsible for coordinating pre-move, move, and post move activities within his or her department.

### PREPARING OFFICE, ADMINISTRATION & ACADEMIC SPACES

#### What, When and How to Pack...

As you know, space is limited. Packing too far in advance of your move can lead to safety issues in regards to corridor clearance. UConn UPDC and MC will work with staff to determine the best schedule and approach to packing, staging and relocating packed boxes to avoid operational disruption. Please check with your designated MC regarding areas within your building that have been designated for recycle and trash collection for use during your packing and purging process.

#### What?

You are responsible for packing the contents of all areas within your departments. It will be your responsibility to have all files, desk contents, books, collections and office contents packed prior to the day of your move.

#### When?

Preparation for your move begins **1 week prior to your move date** with the delivery of empty crates. If your schedule requires that you pack in advance of the scheduled crate delivery for your move, please notify your MC and they will arrange for an early delivery of packing materials. Unpack your crates immediately following the move as the Moving Company will be around to collect empty crates. Any crates not emptied will be your responsibility to recycle the empty crates.

#### How?

When packing moving boxes, follow these steps:

- Assemble moving crate
- Load contents
- Close the top
- Label crate on the side
- Place next crate on top
- Repeat this process until the crates are no more than four high

Please keep all crates destined for the same location together to avoid any confusion on delivery location. Lastly, be sure to have all labels on the same side of your stacked crates.

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## GENERAL MOVE INSTRUCTIONS

The following instructions are intended to assist you as you prepare for your upcoming transition. Please review and adhere to the suggestions. If you have additional questions, please contact your Move Coordinator (MC).

### **Packing Supplies & Materials**

The mover will provide all packing supplies; this includes bubble wrap, clean newsprint and security ties on an as needed basis. These materials should be used for packing your office contents. **PLEASE TAKE ALL PERSONAL ITEMS HOME PRIOR TO THE MOVE** and bring them when you return to your new office. Requirements for additional/different supplies should be coordinated through your MC.

### **Crate/Box Delivery**

You will be supplied with crates for packing your office. The crates and will be delivered approximately **TWO WEEKS** prior to your move. Extra crates will be available.

### **Crate/Box Pick-Up**

You are responsible for unpacking all crates, even those packed by the moving vendor. All Crates need to be unpacked before the start of school. Please re-stack and place empty crates in the area designated by your MC. The Crate will be picked-up within **ONE WEEK** after your move.

### **Move Day On-Site Coordination**

The MC or an UPDC appointee will be present at the send location during the move to ensure that everything with a label is picked up.

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## PACKING INSTRUCTIONS

### Office / Desk Contents

When packing the contents of your office/workstation, **be careful not to overfill crates** to the point that you are unable to move. The crates should lock flat to accommodate the next crate easily on top. Items not needed for day-to-day usage should be packed first. We recommend that you mark “Priority” on one or two crates that contain your every-day items or documents that will be required immediately following your move, so that these will get unpacked first. Protect all glass items with newsprint paper or bubble wrap before placing them in the box. Important: seal paper clips, pencils, pens and other loose materials in envelopes and then pack them in the provided crates. **New trash cans will be provided at your new location, please do not label them for relocation.**

### Furniture Keys

Lock all file cabinets and desk drawers that will be moved. Be sure you have the keys to unlock them. Keys should NEVER be left in locks. The mover is not responsible for missing keys.

### Desks

Your desk will be turned on its side for relocation. Pack ALL contents of your desk into crates. This includes; current working papers, letter trays, books and other desktop items. Place labels on your desk with your new location number on the top corner of your desk. If your desk requires disassembly by the mover please label each section (hutch, return, bridge, etc.) and bring this to your MC’s attention during the staff move meeting. Leave glass tops on top of your desk, however, place a label on these as well.

### Computers/Printers

If you have computers and printers that are relocating, the movers will pad wrap and transport computer equipment in special computer bins. You will be responsible for labeling all pieces for your future location. The IT department will be responsible for shutting down the equipment. Moving company will be responsible for disconnecting/reconnecting all components (keyboards, speakers, cables, surge protectors, mouse, etc.) and placing them in the large zip lock bag. **Do not place a move label directly on monitor screens, place it on the plastic around the screen or on the side of the unit.** You will be responsible for filling out one full sheet of labels with your future location and placing these along with the large zip lock bag(s) provided by your MC at your desk for use by the Moving disconnect team.

### Bookcases

All contents should be packed in crates. Remove all clips and pins and place in an envelope. The envelope should be packed in one of your crates. Drop the shelves to the bottom of the unit and label the top of the bookcase if relocating.

### Filing Cabinets

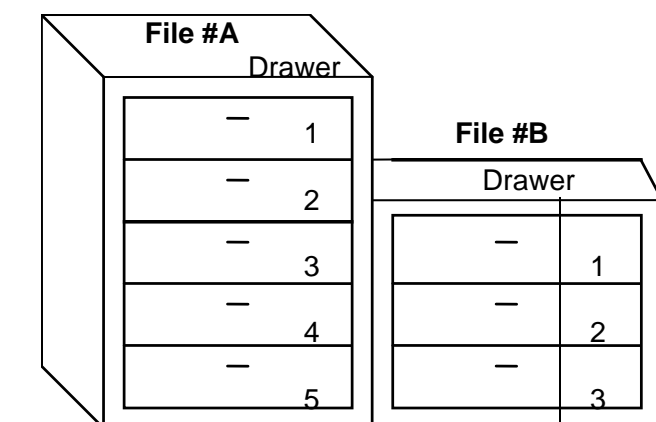
Standard vertical file cabinets moving to your new area do not have to be emptied; however, if you have a file compressor then move it up tight against the files inside each drawer. Use the space (if any) behind the compressor for small, unbreakable miscellaneous items. Do not tape file cabinet drawers.

Lateral file cabinets moving to your new area have to be emptied.

The following information may help you in preparing your files for the move.



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1. Plan Accordingly. Work with your MC to identify how much file/shelving is in your new space.
  2. Purge (clean, eradicate, remove, rid, eliminate) any files that you do not need or are duplicates to ease relocation. Purging bins will be provided.
  3. Assign each file cabinet in your new space a letter. Each drawer in the file or cabinet is given a number. The top drawer is #1; the next is #2, etc.
  4. Assign the contents of each existing file a location in newly renovated spaces.
  5. As you pack the boxes from the existing file, label the crate to the proper room number.



### Purging Bins

If you have files in file cabinets that are not relocating to your new space they must be packed, purging bins will be provided to each Department. Additional trash receptacles and recycling bins will be requested to be placed throughout , as part of the ongoing campaign to purge files prior to the move. Please do not wait until the last minute to dispose of unneeded paper and waste. Extra trash and recycling pickups will be scheduled by your MC to help keep the work space neat and free of hazards.

### Personal Possessions

The movers are not responsible for personal items such as plants, framed pictures, and artwork. Please take these items home with you prior to your move day. If personal items are tagged and relocated by the movers, the movers are not liable for damage. Boxes will be provided for personal items being brought home.

### Supply or Storage Cabinets

All materials in supply cabinets that are to be moved must be unloaded and packed in move boxes. These cabinets cannot withstand moving stress if they are loaded therefore, the cabinet and contents will be moved separately. Prior to labeling the actual cabinet for transport, please confirm with your MC that the item is scheduled to move and on the official inventory list. Lock or tape the cabinet doors, remove any shelves that are not affixed to the cabinet and tape them together and place any shelving pegs in an envelope that can be taped to the inside of the cabinet or packed in one of your crates.

### Pictures, Art, Maps, Charts, Bulletin Boards

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If secured, remove items from the wall. Tag each piece according to tagging guidelines; if picture or plaques are small place them back to back in crates. Large items should be labeled and leaned against the wall using packing material, newsprint, or pack paper to surround items. Include all requests for wall hung items requiring installation at your new location on the **Post Move Report Form (Appendix A)**. Requests will be processed based on priority.

## **Existing Packed Boxes**

If you have materials that are currently packed in boxes, or in original packing, simply attach a label to the side of the box and it will be moved to the designated location. Please remember that boxes need to be in good condition and closed fully.

## **ITS Preparation Instructions**

The Moving Company will supply packing labels & bags for small technology items. Please leave a filled out sheet of labels on your desk. All bagging/tagging, inventorying, equipment disconnects and reconnections of existing equipment will be the responsibility of the Moving Company. All Users are responsible for backing up their machines. Follow the backup instructions below. If you have any further questions, please contact your local Information Technology Services Department at [helpcenter@uconn.edu](mailto:helpcenter@uconn.edu).

## **Electronic Records & Electronic Devices:**

Make sure to inventory your devices, including all mobile devices (laptops, iPads, etc.) and other storage devices (flash drives, external drives, disks/CD's). Keep a list of what you/your office has. Decide what devices to take with you personally, and what should be moved by Movers.

Take this opportunity to also review whether the University devices assigned to you/your office have been properly tagged. Reach out to Inventory Control with questions or concerns. If in the process of packing you determine that there are devices you no longer needed, be sure to follow University protocols for disposing of the data on those devices and the protocols related to surplus of University property.

Once you know what devices you have, be sure to inventory their contents—meaning that you should know what sorts of data are housed on each device.

Confirm whether your device is encrypted. Does it have whole-disk encryption (meaning that the whole device is encrypted, and the contents stored there are only available if you have the right password or key to login)? If whole-disk encryption is not appropriate or unavailable for your device, are the sensitive files on your device encrypted? Or are you storing sensitive files only on your department's servers rather than on the device's hard-drive? Work with IT if you are unsure or need assistance.

### Device Backup

All Users are encouraged to backup all data on devices prior to Move Day. Data should be moved (not copied) from desktop, My Documents, or Documents folder to their P, Q, or Office 365 One drive. This will clear all data from devices onto server / cloud based services that are all regularly backed up.

P= Personal 10GB space, managed and supported by UITS

Q = Departmental Share, managed and supported by UITS

One Drive = Personal and self-directed/managed Office 365 Cloud based storage with UNLIMITED storage

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## Phone Transfers

UConn IT will be providing like for like phone and voicemail services for your move.

UConn IT will be working with designated representatives from each area to work out the details of the phone services you will have as well as the scheduled date of your move.

More information will be provided to you through your area representatives as we get closer to the scheduled move dates. If you have any questions, please feel free to contact **Voice User Services #860.486.4357(Option 3)**

## Book Donations

Better World Books will accept donations (assuming they meet the donation requirements). Better World Books will pick up a minimum of six boxes of books at a time. There will be book box locations available for you in your current building so you can start the donation process. Refer to **“Better World of Books Criteria” (Appendix F)** for additional details on donation criteria.

Any books not meeting the World of Books criteria can be boxed and sent to University Surplus.

## Miscellaneous Items

Items that are too large to be packed in a crate will require a label only. Examples of these types of items are lamps, mirrors and whiteboards. Any piece of equipment that can become detached during the move will need to be labeled individually. Do not place move label directly on sensitive materials.

## University Surplus Items

All unwanted furniture and equipment will need to be reviewed by University Surplus. All users with potential surplus items will need to fill out an ACT 39 form. Central Stores, specifically Surplus Management, administers the University Surplus Program. Per Public Act 91-256, the University of Connecticut has the authority to dispose of surplus, unused and/or unserviceable equipment and supplies. Proper disposal of University property is required pursuant to Section 4a-77a of the General Statutes. Surplus Management determines if items sent to surplus will be reused or recycled to the University. Additional Information regarding the University Surplus Program may also be found on the [UConn Policies & Procedures](#) web site.

**To reach Surplus, call 860-486-3094.** (Fax: 860-486-3694.)

*University property can never be discarded without approval by Surplus Management.*

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## LABELING INSTRUCTIONS

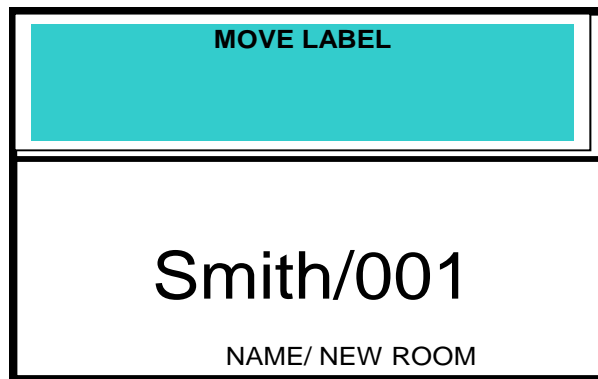
Relocation of your office furniture to the new location is done by using a color coded labeling system. **The only information that is needed is your future room number and your name.** If multiple users are going into the same room but the desks are not numbered, personnel should put their last name in the upper portion of the label. The mover will provide all labels and tags.

### Move Labels

Carefully print your future room number and name in large letters/numbers with a dark marker before placing the tags on items. **If it is not tagged, it will not get moved.** A label **MUST** be on everything, including your monitor and CPU, floor mat, artwork, etc. **Do not use labels from other departments.**

As you pack each crate and label each piece of equipment, you should apply a label with:

- **LAST NAME & FUTURE ROOM NUMBER ONLY WRITTEN WITH A SHARPIE MARKER**



### Special types of Furniture

Some items (i.e. desks with a return or bookcase) may need to be dismantled. If so, be certain all sections have the same tag and color/code information on them. In case you missed something like the legs on a table that had to be dismantled, leave a sheet of filled out labels on your desk so they can be used if needed. Please note that labels do not stick well to fabric. If you are labeling your office chair, place the label on the base of the chair.

### Label Placement

Please follow the illustrations on pages and place coded tags in a uniform manner. The mover requires this uniformity to quickly and efficiently place furniture and equipment in the new location. Be sure your tags are placed where they will stick (i.e. plastic, wood, or metal surfaces). A piece of clear tape may be used to keep labels attached to surfaces such as fabric. Place one label on the short end of all packing crates in the space noted. Labels should be placed on the same side of each crate so that they can be easily checked for proper placement in the new facility.

The labels remove fairly easily; however we urge caution in placing them on sensitive surfaces. Place labels on the back of maps, bulletin boards or art. Place them on the plastic portions of monitors, not the screens.

Label removal is easier the sooner they are removed after the move. We encourage you to remove labels from all prominent locations within a week of your move.

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## Where to Label Items for Your Move?



**Please remove or cover old labels which may have been left on the crate.  
If an item is not tagged, it will not be moved.**

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## FILES & RECORDS MANAGEMENT

### Security Files

All files must be locked prior to the move. If security regulations necessitate escorts, please notify the MC and he/she will make arrangements. Security files may be consolidated and moved on one or more vehicles, as required. Security seal crates will be provided for all security files.

### University Records Policy

In preparation for the move, this guidance will help you to make decisions pertaining to your University records. We recommend you immediately begin to assess what University records you have in your possession. It can take you some time to evaluate what should be kept and what can be discarded, and it may take a month or more to request and receive record destruction authorization. It is important to take action well in advance of the move—there will not be the space for excess records at the new campus. We encourage you to collaborate with other individuals in your unit to create an agreed upon plan and to optimize efforts.

Tools are available to help you get organized. Begin by using our record inventory template (<http://rim.uconn.edu/inventory/>) to identify what University records you have. You may also find it helpful to peruse the University's Records and Information Management site (<http://rim.uconn.edu/>) which offers further detail on the record policies and procedures we are required to follow as a state agency. Additional tips are provided in the pages that follow. If you have any questions or require further guidance, please contact:

Betsy Pittman at [Betsy.Pittman@uconn.edu](mailto:Betsy.Pittman@uconn.edu) / (860) 486-4507

Laurie Neal at [Laurie.Neal@uconn.edu](mailto:Laurie.Neal@uconn.edu) / (860) 486-4805

### Keep only what is necessary

This includes:

- [Official record copies](#)<sup>1</sup> that **have not** met the state's [minimum retention requirements](#)<sup>2</sup>;
- Records that continue to support a business need;
- Records related to *current or pending* litigation holds, Freedom of Information Act requests; or audits.

This does not include:

- Official record copies that **have** fulfilled the state's minimum retention requirements (as long as such records are no longer needed to support University business);
- "Non-records" such as convenience files, duplicate records or drafts<sup>3</sup> that are no longer useful;
- Historical records. These should be transferred to the University Archives for proper preservation. Examples of records with archival value are meeting minutes, program documentation, senior level correspondence, syllabi, publications, collaborations, and strategic planning. Consult with Betsy Pittman before transferring any files to Archives and Special Collections.

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1 For the definition of "official record copies" visit: <http://rim.uconn.edu/?p=54>

2 Minimum record retention requirements are available at: <http://rim.uconn.edu/record-retention-schedules/>. Please note, for most financial records, the University has extended this minimum to 7 years.

3 For the definition of non-records and examples, visit: <http://rim.uconn.edu/?p=54>.

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### Dispose of records that are not necessary to keep

For destruction of official record copies that have fulfilled the state's minimum retention requirements you must:

- Request approval prior to destruction using Form RC-108. Instructions outlining this process, including the necessary form and tutorials, are available at: <http://rim.uconn.edu/destruction-authorization/>;
- Wait for destruction approval before destroying the official records. Once authorized, shred or recycle the pertinent records. Shredding is required for confidential and protected records.

For destruction of non-records (convenience copies, duplicates, drafts etc.) you may:

- Shred or recycle without requesting permission to do so. Shredding is required for confidential and protected records (see the next page for definitions of these terms).

### Keep records safe and secure

Once you have received permission to destroy official record copies or determined permission is not necessary for your "non-records," you must dispose of the records properly. You are required to shred confidential and protected records (as defined below). The campus has contracted with Info-Shred for shredding services. Contact your move area coordinator for shredding bin locations or to request shredding bags. Only public information and data may be recycled. If you are not sure about how to classify a record's content, err on the side of caution and shred.

Data classification levels for University records and data are defined within the Information Security Policy Manual:

**Confidential Data** requires the highest level of privacy and may not be released. Confidential Data is that is protected by either:

- Legal or regulatory requirements (e.g., FERPA, HIPAA)
- Contractual agreements (e.g., Non-disclosure Agreements)

See Appendix A (also available at: <http://security.uconn.edu/extended-list-of-confidential-data/>) for the extended list of Confidential Data for common types of confidential data provided by the UITS Information Security Office.

**Protected Data** may be disclosable to the public, but only following legal requirements or specific University protocols (e.g. Connecticut Freedom of Information requests). This is data that is neither Confidential nor Public data (e.g., employee email). This data must be appropriately protected and stored to ensure appropriate protocols are followed.

**Public Data** is open to all users, with no security measures necessary. Data is public if:

- There is either an obligation to make the data public (e.g., Fact Sheets), or
- The information is intended to promote or market the University, or pertains to institutional initiatives (e.g., brochures, publications).

**Important Note:** At certain times throughout this entire packing and moving process, records will be removed from filing cabinets, storage areas and ultimately shuffled around. They will either be prepared for destruction or staged to move. It is essential at all times that they are kept safe. Monitor where all records, especially confidential or protected, are located and ensure they remain secure. Do not leave records unattended in unsupervised or non-secure areas.

### Pack (and unpack) smart

- Use standard size boxes (15 x 12 x 10") or boxes provided by the movers.
- Know how many boxes you'll need (1 vertical filing cabinet = 2 boxes per drawer and 1 horizontal filing cabinet = 3 boxes per drawer);

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- Group together “like” records and label boxes;
  - Track the contents of each box via spreadsheets (for example, box 1 = student advising records of students last name A-G; box 2 = student advising records last name H-M, date) and label appropriately;
  - Limit each box to approximately 35 pounds;
  - Unpack boxes methodically;
  - Account for all boxes to ensure they have safely made it to the destination.

#### Know your record storage options

Inevitably, there will be some records that you need to keep. It is important to understand what storage options are available and to choose the best option to meet your needs and capacities. Visit <http://rim.uconn.edu/storage-overview/> for an overview of record storage options.

#### Extended List of Confidential Records

Sensitive University Data is data that is considered Registered Confidential or Confidential (based on the Data Classification policy). It is data that is regulated by Federal or State laws including but not limited to:

- Family Rights and Privacy Act (FERPA)
- Health Insurance Portability and Accountability Act (HIPAA)
- Electronic Communications Privacy Act (ECPA)
- Gramm-Leach-Bliley Act (GLBA)
- Children’s Online Privacy Protection Act (COPPA)
- Connecticut Personal Data Act
- Federal Trade Commission (FTC) Red Flag Rule (Identity Theft Regulation) or other relevant University policies or procedures.

The following data elements require the highest level of protection. This list may expand based on future regulatory requirements. **This list is not to be construed as a comprehensive list.** Other data may also require similar protections. *Contact your Department’s IT Security representative and/or the Assistant Director of Compliance/Privacy to discuss the security measures that must be implemented for all other data that is not considered public.*

#### Social Security Numbers (SSN) and Other Personally Identifiable Information:

- Name (First name or initial and Last name), when stored or displayed with one or more of the other listed data elements
- SSN/Individual Tax Identification Number (ITIN)
- Driver’s license number
- State identification card number
- Financial account numbers such as credit, debit, or bank account numbers
- Passport number
- Alien registration number
- Health insurance identification number
- Home address or phone number of individuals in protected classes (FOIA)

#### Credit Card Information

- Primary Account Number (when stored with any other information below)



- 
- Cardholder Name
  - Service Code
  - Expiration Date

#### (Individual) Student University Records

Any records in which a current or former University student could be individually identified such as:

- Grades/Transcripts/Test scores
- Courses taken/Schedule
- Advising records
- Educational services received
- Disciplinary actions
- Student Financial Aid, Grants, and Loans
- Financial account and payment information including billing statements, bank account and credit card information
- Admissions and recruiting information including test scores, high school grade point average, and high school class rank, etc.
- Student Personnel records

Refer to the [University's FERPA policy](#) for additional information.

#### Personal Health Information

- Information that identifies the individual, or could reasonably be used to identify the individual, including, but not limited to name, addresses, telephone/fax number, medical record number, telephone number, birthday, admission/discharge date, vehicle ID and serial number, device IDs and serial number, certificate/license numbers, biometric identifiers, full-face images, other unique identifying number/characteristic/code.
- Information about the patient's or client's past, present or future physical or mental health or condition
- Information relating to the provision of, or payment for, health care

#### Financial Data

- Employee financial account information
- Student financial account information – aid/grants/bills (covered under FERPA)
- Individual financial information
- Business partner and vendor financial account information

#### Records Policy: Frequently Asked Questions (FAQ)

##### **Q: May I scan all of my records and destroy the originals?**

A: Scanning or “digitizing” your University records is permissible provided you adhere to the state’s Digital Imaging Policy, Standards, and Procedures found at: <http://rim.uconn.edu/scanning-requirements/>.

Carefully consider if scanning is the best solution for you as the scanning process, done right, takes a good deal of time and resources. Scanning can be beneficial to access records that you retrieve frequently. For records requiring infrequent retrieval, consider off-site storage.

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## Q: How long am I required to keep a certain type of record?

A: Record retention schedules for Connecticut State Agencies (including UConn) are created and maintained by the Office of the Public Records Administrator of the Connecticut State Library. Go to <http://rim.uconn.edu/record-retention-schedules/> to look up how long you must keep certain records. For assistance, contact Betsy Pittman at (860) 486-4507 or Laurie Neal at (860) 486-4805.

For the most up-to-date frequently asked questions and answers, visit: <http://rim.uconn.edu/faqs/>.

## CHECK-OUT PROCESS

Before leaving your office the day prior to the physical move, check around your workstation and ensure you are leaving it clean and mark all items that are trash. Do not use packing boxes for trash.

Remain conscious of safety precautions during the move preparation process, i.e. do not block corridors with trash, equipment or crates. Do not attempt to lift or move heavy objects/crates on your own. Ask for help.

## PRE-MOVE WALKTHROUGH

Prior to your Move Day, the Move Logistics Team will perform a pre-move walkthrough to ensure all items are packed and labeled.

## INVENTORY CHECK-OUT FORM

This “**Inventory Check-out Form**”(Appendix B) will be used in your work area to verify that all the items you designated for moving arrive at the correct location. **As you pack, complete this form. Make a copy of the completed form for yourself and place this form on your desk in plain sight.** When you return to your office, use your copy to verify that all items designated for the space arrived.

Any items that do not arrive to their final destination or are not delivered in their original condition will need to be noted on your “**Post-Move Report Form**” (Appendix A).

Record the descriptions of labeled items next to their label number. Leave blank or cross off any unused, damaged or destroyed labels.

## POST-MOVE REPORT FORM

The Move Logistics Team will place a “**Post-Move Report Form**” (Appendix A) on each desk and workstation in the new location. These forms may be used by all relocated employees to report any issues they may be having with their furniture, equipment or crate contents. If an issue occurs please fill out the **Post-Move Report Form** and give to your MC. Forms will be collected by your MC and responded to within **ONE WEEK of your Move.**

## ASSET TAGGING

All items within new space will receive an asset tag and loaded into master asset inventory. All items are to remain within new space. **DO NOT** remove, swap or exchange items.

## APPENDIX A

### MOVE INITIATION FORM

To be filled in by requesting department:

Date: \_\_\_\_\_ Initiating Department/College: \_\_\_\_\_

Initiator Name: \_\_\_\_\_ Email: \_\_\_\_\_

Phone: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Building Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

Moving within the Same Building: Yes / No

If No, Building Name: \_\_\_\_\_ Street Address: \_\_\_\_\_

To be filled in by Facilities Professional

Moving as part of a Project: Yes / No

If yes, Project Manager: \_\_\_\_\_ Project # \_\_\_\_\_ If No, KFS # \_\_\_\_\_

Preferred Move Date: \_\_\_\_\_ Alternate Move Date: \_\_\_\_\_

Move Description: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Other work to be coordinated as part move: Yes / No Work Order Control Contacted: Yes / No

Brief Description: \_\_\_\_\_

\_\_\_\_\_

Environmental Health & Safety contacted: Yes / No / N/A Items Marked: Yes / No

Form(s) attached: Yes / No Form(s): \_\_\_\_\_ Initials: \_\_\_\_\_

University Information Technology Services contacted: Yes / No / N/A Items Marked: Yes / No

Form(s) attached: Yes / No Form(s): \_\_\_\_\_ Initials: \_\_\_\_\_

Logistics Administration contacted: Yes / No / N/A Items Marked: Yes / No

Form(s) attached: Yes / No Form(s): \_\_\_\_\_ Initials: \_\_\_\_\_

Notes: \_\_\_\_\_

\_\_\_\_\_

Date Move Completed: \_\_\_\_\_

Initiator \_\_\_\_\_

Facilities Professional \_\_\_\_\_

Logistics Administration \_\_\_\_\_

---

**APPENDIX B**  
**POST MOVE REPORT FORM**

**Date:**

**Name:**

**Time:**

**New Room Number:**

When completing this form, please be specific about the nature of your report or request and write legibly.

**Facilities Issue (Ex. signage, new furniture damaged):**

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**Move-related Issue (Ex. missing furniture or equipment, item placed in wrong position, received items not belonging to you):**

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**IT Equipment Issue (Ex. telephone, computer, printer):**

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---

**Wall Hanging Request (Ex. Pictures, Art, Maps, Charts, Bulletin Boards):**

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**Other Issue (Ex. Lighting, power outlet, data outlet):**

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**Please return to your Move Coordinator within 5 days of your move.**

---

## APPENDIX C

### INVENTORY CHECKOUT FORM

New Room:

This **INVENTORY CHECK-OUT FORM** will be used in your work area to verify that all the items you designated for moving arrive at the correct location. **As you pack, complete this form. Make a copy of the completed form for yourself and place this form on your desk in plain sight.** When you return to your office, use your copy to verify that all items designed for the space arrived.

Record the descriptions of labeled items next to their label number. Leave blank or cross off any unused, damaged or destroyed labels.

Label #	Description
1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	
14	
15	
16	
17	
18	
19	
20	
21	
22	
23	
24	
25	
26	
27	
28	
29	
30	

## ACT 39 SUPPLUS FORM

22

### EXISTING EQUIPMENT INVENTORY LIST

**Faculty Lead**  
**Department Name**  
**(FROM) Building /Floor**

EF: *PRINT DATE:*  
MOVE ID# *moving Date:*  
MOVE WE *TED*  
(TO) Building #Floor

[illegible]

## APPENDIX F

### MOVE OPERATIONAL INTERVIEW FORMS



Date:  
UConn Dept:  
Existing Building/Room(s):  
Room Function:  
Position:  
E-Mail:  
Phone No:

Move Coordinator:  
Hartford Relocation Building:

Move Team - Staff Names:	Title	Phone	Email

The purpose of the Operations Questionnaire Interview is to gather information to be used in the planning and execution of the overall transition to the new building. This questionnaire is to be completed prior to the scheduled on-site Move Team Operational Interview meeting and will be used by Gilbane's Transition Team & UCONN's Core Move Planning Team (Scientific Services, UPD&C, Facilities, EHS, IT, Site Director, and HR) as the basis for creating detailed timelines for the move(s).

#### THE FOLLOWING TASKS WILL BE REVIEWED DURING INTERVIEW PROCESS

##### TASKS:

- £ Review existing floor plans, furniture layouts
- £ Review Operations Questionnaire for further dialog

##### GENERAL QUESTIONS

1. Briefly describe your program and functional operation (what function do you support?)
2. What are your normal hours of operation?
  - a. ☐ Weekdays 8–5
  - b. ☐ Weekend hours
  - c. ☒ 24 hours day
  - d. ☐ Emergency Response
  - e. ☐ Other (please describe):



3. Does your area have special security or access requirements? If so, please explain:

**4. CRITICAL OPERATIONS**

*Every lab unit should anticipate some period of disruption during the move to their new space. Critical operations are defined as activities that are of regulatory nature and mission critical.*

1. Are you aware of any critical operation dates, prior to or during the summer of 2017? \_\_\_\_\_  
If yes, please explain:

2. Does your Department have any regular monthly protocols or obligations that would affect the time of move?

- ☐ Scheduled Reports
- ☐ Systems Testing
- ☐ Budget&Accounting
- ☐ Department Purchasing
- ☐ Meetings/Retreats
- ☐ Conferences
- ☐ Academic Reviews
- ☐ Presentations
- ☐ Student Evaluations
- ☐ Other

3. Does the Department have any work related adjacencies that necessitate simultaneous relocation, or immediate subsequent relocation?

If yes, please provide the adjacent Department(s) and function(s) involved:

4. If you currently share equipment with a Department which is NOT moving to the new facility, please list equipment that are used in daily operations. Please provide the list of other Departments(s) who share each service or equipment.

5. Does the Department have any specialized equipment that requires access to a specialty network or secure fax line? If so, please provide the information below. (This can be discussed in more detail as we meet with you also.)

<u>Type of Equipment</u>	<u>Shared (Y/N)</u>	<u>Description of network needs</u>

6. Is there a need for redundant operations? (Operating at both existing location and new location)?

<input type="checkbox"/>	Yes
<input type="checkbox"/>	No

If yes, please provide justification. Redundant operations must be necessary to meet a regulatory need and will be contingent upon Director approval.

- List any equipment or materials that need to be relocated to support this redundant operation. For example: one week prior to move, relocate equipment to new facility, calibrate, commission, verify operations, etc.
- Are you aware of any location within the existing facility that performs similar operations and might be able to support a shared operation during your move to the new facility? If yes, please provide the information on the existing facility lab.

7. List mission critical services that must be in place at the new facility before you can move.

8. Briefly describe what office equipment is used, approximate quantities and current location (current room number building).

	<u>Qty</u>	<u>Shared</u> (Y/N)	<u>Location</u>	<u>New</u> (Not Moving)
<input type="checkbox"/> Copiers				
<input type="checkbox"/> Shredders				
<input type="checkbox"/> Postage Equip				
<input type="checkbox"/> Faxes				
<input checked="" type="checkbox"/> Other				

9. List your Department computer equipment.

	<u>Quantity</u>	<u>Location</u>	<u>New</u> (Not Moving)
<input type="checkbox"/> Desk top			
<input type="checkbox"/> Laptop			
<input type="checkbox"/> Printers			
<input type="checkbox"/> Scanners			
<input type="checkbox"/> Projectors			
<input type="checkbox"/> Hubs			
<input type="checkbox"/> File Servers			
<input type="checkbox"/> TVs			
<input type="checkbox"/> Monitors			
<input type="checkbox"/> Other			

10. Describe any additional equipment that your department is using (mailroom equipment and issues associated with their relocation).

11. Describe files (not personal office contents):

				Quantity (file drawer/section e.g. 5-high)	
<input type="checkbox"/>	Lateral File Cabinets (Letter Size)	<input type="checkbox"/> Width	<input type="checkbox"/> Depth	_____	
<input type="checkbox"/>	Lateral File Cabinets (Legal Size)	<input type="checkbox"/> Width	<input type="checkbox"/> Depth	_____	
<input type="checkbox"/>	Vertical File Cabinets (Letter Size)	<input type="checkbox"/> Width	<input type="checkbox"/> Depth	_____	
<input type="checkbox"/>	Vertical File Cabinets (Legal Size)	<input type="checkbox"/> Width	<input type="checkbox"/> Depth	_____	
<input type="checkbox"/>	High Density File Cabinets (specify size of files)	<input type="checkbox"/> Width	<input type="checkbox"/> Depth	_____	
<input type="checkbox"/>		<input type="checkbox"/> Width	<input type="checkbox"/> Depth	_____	

*Specify if only contents of the file cabinets are moving & approx. size in linearfeet.*

12. Does your area have other collections records?

<input type="checkbox"/>	Data	Location: _____ Accessed by: _____
<input type="checkbox"/>	Archives	Location: _____ Accessed by: _____
<input type="checkbox"/>	DVD's CD's Other.:	_____
	Please specify location:	_____

13. Does your area have internal servers? Is there a Departmental server room?

<input type="checkbox"/>	Yes	Location: _____
<input type="checkbox"/>	No	

14. Do you have any leased equipment? Example: Shred Boxes, Vending Machines, Copiers (If yes, please explain)

15. Do you have any "stand alone" systems that Facilities or IT may be unaware of? If so,

do any of these items have special warranties and/or requirements that need to be addressed, for the move?

- 16.** Does your area have records, furniture or equipment stored elsewhere on campus or off-site that will need to be relocated? If so, briefly describe.
- 17.** Do you have any floor-mounted, wall-mounted or ceiling-mounted equipment/furniture that needs special reinforcements when relocating (i.e. AV equipment)?

**OTHER:**

- 1.** List services that you share currently with other organizations/departments/laboratories. Will these shared services continue?
- 2.** Describe any other information and/or concerns that need to be considered in the planning and scheduling of the relocation project.

## APPENDIX G

### WORLD OF BOOKS DONATION CRITERIA

#### MATERIAL GUIDELINES

## Follow the guidelines below when sorting material prior to shipping.

We are committed to making our program as simple as possible for you. Please box and send surplus materials that your library can no longer put to use.



#### BOOKS AND MONOGRAPHS

Antiquarian, Rare and Collectible Books  
(e.g. Special Collections)  
Children's Books  
College Textbooks (published within past 10 years)  
Foreign Language Books (in Western Script)  
Hardcover Fiction and Nonfiction  
Mass Market Paperbacks  
Trade Paperbacks

#### OTHER MEDIA\*

CDs, DVDs and Blu-ray Discs  
Books on CD  
Video Games

\*Only send complete disc sets with original case art.

#### A QUICK NOTE ABOUT THE CONDITION OF MATERIALS.

Books must be free of mildew, mold, and dirt. They should not exhibit excessive spine damage, have missing pages, or be missing their covers. Books cannot have water damage. Please leave any library treatments intact. No part of the book's pages should be removed with scissors or razor blades. For media, sets must be complete and cannot be missing the original case art.



Any books which do not meet the Condition Requirements above.	Directories and Telephone Books
Activity Books and Workbooks (ex: Coloring Books)	Multiple Copies (in excess of 20 copies per title)
Annuals and Yearbooks	Free Copies, Examination Copies, or Advanced Reading Copies
Audio Cassettes, VHS Tapes, LP Records, & Computer Software	Journals and Periodicals (e.g. Literary Criticisms)
Books Published by Magazines (ex: Reader's Digest, Condensed and Time-Life Books)	Microfilm and Microfiche
Britannica and World Book Encyclopedia	Newspapers and Magazines (e.g. National Geographic)
Case Law and Procedural Books	Non-Western Script Books
Custom Course Packets	Tax and Government Documents or Forms
Dated Reference Material (over 5 years old)	

## **APPENDIX H**

### **EH&S, LABORATORY FORMS & PROCEDURES**