



Alberta Records Management Committee

Senior Records Officer Circular: #2002-02

Topic: Transfer of Approved Records Schedules

This Circular sets out updated procedures to transfer responsibility for approved records retention and disposition schedules between government organizations.

When government programs and services move from one ministry or agency to another, the business records that support them also move. Depending on program requirements, some or all of the records may be transferred to the new ministry. To enable ongoing disposition of these records, responsibility for the related retention and disposition schedules or schedule items also needs to be transferred.

The **Senior Records Officer** of the **transferring organization** must:

- Work with the affected business units to identify records for transfer.
- Identify which schedules and/or schedule items must be transferred to the receiving organization to enable continued disposition of the program's records.
- Obtain the agreement of the Senior Records Officer of the receiving organization for schedule and/or item transfers.
- Ensure that the records are transferred securely.
- Use the "Transfer Schedule" procedureⁱ in RSS (Records Scheduling System) to transfer the schedules and/or items. This process automatically notifies the Secretary of the Alberta Records Management Committee (ARMC) that a schedule transfer is underway.

The **Senior Records Officer** of the **receiving organization** must:

- Review the transferred schedules and/or items to verify that they are accurate and up-to-date, and
 - Confirm that the ministry will continue to use the schedule(s)/item(s) as transferred
OR
 - Amend the transferred schedule(s)/item(s) using RSSⁱⁱ
OR
 - Create a new schedule that cancels the transferred schedule/item(s) using RSS.ⁱⁱⁱ

March 15, 2002

The **Secretary** of the **ARMC** must:

- Acknowledge receipt of the transfer notification generated by the "Transfer Schedule" procedure in RSS. The Alberta Records Centre can then update the data about stored records in it's systems.
- Report on schedule and/or item transfers at each ARMC meeting.

The procedures in this SRO Circular #2002-02 supercede those detailed in the scheduling manual^{iv} and take effect on the date this Circular is signed.

Original Signed by Tom Thackeray

March 18, 2002

Tom Thackeray, Chair
Alberta Records Management Committee

Date

ⁱ See *"Records Scheduling System (RSS) Release 2 User Manual"* (January 2002), Chapter 4-k-ii, pages 39-41 ("Approved Schedule Transfer").

ⁱⁱ See *"Records Scheduling System (RSS) Release 2 User Manual"* (January 2002), Chapter 4-m-ii, pages 44-45 ("Major Amendments")

ⁱⁱⁱ *"Records Scheduling System (RSS) Release 2 User Manual"* (January 2002), Chapter 4-d-j, pages 14+ ("Create a New Schedule", etc.)

^{iv} See *"Records Scheduling and Disposition in the Government of Alberta"* (1996), Chapter 2-15, Page 9, paragraphs 2-3 ("Transfers from One Government Organization to Another" and "Partial Transfers").