



Date: February 05, 2014

To: Keith Self, County Judge
Mark Reid, Commissioner, Pct 1
Cheryl Williams, Commissioner, Pct 2
Chris Hill, Commissioner, Pct 3
Duncan Webb, Commissioner, Pct 4

From: Caren Skipworth, Chief Information Officer

Re: **Collin County Records Policy (Updated Feb 2014)**

IT is requesting to approve the updated version of our Collin County Records Policy. We revised the Records Policy to reflect our goal to digitize documents, reduce storage and minimize paper. I have also included the box transfer procedures, box storage procedures and the request for box transfer form since they are referenced in the revised Records Policy.

Changes to the Records Policy (not including minor formatting issues) include:

1. Added a purpose and goals section (from 2012 IT Goals & Objectives document) on page 1
2. Added section 2 Collin County records declared Public Property. The text of the first paragraph is in the 2005 version; this just added the section title.
3. Added 2nd paragraph to new Section 2 regarding duties of the custodian when exiting their office/employment.
4. Added definition of RMS to Section 3 additional definitions.
5. Added definition of Footprints to Section 3 additional definitions.
6. Changes the references to the County's Records Management Officer to reflect the appropriate job title, Collin County Records Manager, as per IT departmental organization chart.
7. Added two paragraphs at the end of Section 5 regarding the destruction of scheduled and unscheduled records as per State Library guidelines.
8. In all sections changed Director of Information Services to correct title, Chief Information Officer of Information Technology.
9. In Section 5 added "developing a records management plan" to the sentence regarding the duties of the County Records manager.
10. Deleted several paragraphs in Sections 6-9 that are processes or procedures, not policies. These are documented in the Records Management manual and are part of the Records management Plan.
11. Added a Section 9 "File Delivery and Retrieval" and changed Section 9 to Section 10.
12. Added in Section 10 specific effects if no response to "Request for Destruction".
13. Added Section 10.3 – Shredding of Documents
14. Updated Section 8 and section 10.3 to include reference to Box/Document Transfer form as well as the procedures available. Moved last paragraph regarding shredding from section 8 to the proper section 10.3
15. Updated the email to e-mail in section 10 to match the rest of the document.
16. Modified section 10.2 to include reference of certified scanning vendor.
17. Added sentence to section 10 regarding written justification to retain files past their retention times.