**HMS**

**HMS Relocation Type - Move**

**Standard Operating Procedures**

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|  | Prepared by: |
|  | HMS Operating Procedures Working Group |

**National Archives and Records Administration**

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**Document Change Log**

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| --- | --- | --- | --- | --- |
| ***HMS Processing Standard Operating Procedures Change Log*** | | | | |
| **Version** | **Date of Change** | **Sections Impacted** | **Summary of Changes** | **Changed by** |
|  |  |  |  |  |

**HMS Relocation Type - Move**

The Move relocation type in HMS documents the significant move of records, usually from one facility to another. This relocation type can be used for the following reasons:

* Special storage needs like cold storage
* Regionalization
* Moving of records from one NARA facility to another

The Move relocation type is different from the Transfer relocation type. Physical custody of the records remains the same, but the physical location changes. In the Transfer relocation, physical custody of the records changes from one unit to another.

HMS Steps

1. Navigate to Relocation tab.
2. Choose Move as Relocation type.
3. Query for and select appropriate Record Group number.
4. Originating Archival Unit will default to user unit.
5. Query for and select the Record Entry that will be moved.
6. Choose Transfer Reason – Regionalization, Special Storage Needs, or Other.
   1. If Special Storage Needs is chosen, choose appropriate reason in Special Storage Needs field.
   2. If Other is chosen, explain reason for move in Other Reason field.
7. Fill out Shipping Instructions and Comments as necessary.
8. Navigate to Assets tab.
9. Choose assets that will be moved. If all assets are being moved, hit Add All Assets. If individual assets are being moved, you can either click Add next to that asset, or highlight the assets and click Add Selected Assets.
10. Update asset locations through Space Allocation or manually.
11. Once Assets are added, change the Status to Closed. This closes the Relocation, and keeps a permanent documentation of the move.
12. Check ARC or DAS to determine if they need to be updated.