Electronic Records and Data Management
Migration Plan Template Checklist

ARM 44.14.101 allows for official records to be maintained electronically, so long as an agency has a migration plan that supports records retention requirements for accessibility, readability.

A migration plan is an agreement between the business owner and its technology service staff that records and associated data will be stored throughout its lifecycle.

This checklist provides guidance for migration plan considerations and requirements. While this list may not be all inclusive of the agency's requirements for migration of data, it provides minimum guidelines.

- o Declare Agency Name, Program Name and Program Code (if unknown, contact SOS-RIM at 444-9000).

- o Declare, by position title or work unit, as to who owns the records and data.

- o Declare technology being used, by application name(s)

- o Declare technology being used, by format type(s)

- o Declare that the agreement ensures migration from:
    - o one application to its newest version
    - o one application to another application in its newest version

- o Declare migration timeline (beginning-end)

- o Declare how migration accuracy and completeness will be measured

- o Declare who performs migration and their roles and responsibilities:
    - o Business Owner
    - o Information Technology Staff

- o Declare how legacy records and data, that are not migrated, will meet retention, preservation or disposal requirements.

- o Obtain Business Owner and Information Technology staff's signature, by position title, as to who has authority over this migration process.