



Electronic Records and Data Migration Plan

^Agency Name^

^Program Name^

^Program Code^

Introduction

Montana Administrative Rule 44.14.101 – RECORDS RETAINED ON DIGITAL MEDIA - allows agencies to retain official records in digital format, as long as the agency has a Retention Schedule and a Migration Plan that has been approved by the State Records Committee; on file with the Secretary of State Records and Information Management office. Refer to the Secretary of State’s website for additional information or for links to required forms.

Purpose

The purpose of this migration plan is to ensure that the agency is setting forth the protection protocols and practices necessary to keep official, digital records readable and accessible, for their entire lifecycle. This is true, whether a record is being kept for 2 years or 200 years. Protocols and practices include, but are not limited to, upgraded software migrations, data or records conversions, refreshment cycles for long-term or archived records, etc.

Definitions

Migration Plan Statement

Changes in technology may bring about changes in underlying business processes. Increased electronic capacity may become available. The age or characteristics of the electronic media that is in use may require migration from on media source to another. Whenever necessary or desirable from a business perspective, it is the plan of the Agency Name and Program Name (owner), to migrate electronic data and records to new media and or new supporting software.

The Migration Plan constitutes the guidelines for the migration electronic records and data to new media or to new software. In regards to migration, as related to the ^Program Name^, it is also the commitment of the records and data business owner and staff to:

- ❖ open standards of digital recording on selected media,
- ❖ robust methods for preventing, detect and reporting errors,
- ❖ ensure sufficient use of media availability and replacement,
- ❖ know lifecycle (longevity) of stated records,
- ❖ know susceptibility to degradation or deterioration,
- ❖ determine a favorable cost/benefit ratio, and
- ❖ availability of methods for recovering records from potential loss.

Once it is determined that migration of records and data will be required, by the ^Agency Name^ and ^Program Name^, it is the commitment of its information technology staff or the staff of a hosting agency or vendor to:

- ❖ preserve the technology used to create or store the records,
- ❖ emulate the technology on new platforms,
- ❖ migrate the software necessary to retrieve, deliver and use the records,
- ❖ migrate the records to up-to-date formats, and
- ❖ convert records to standard forms.

Specific Detail of Migration Plan

See the Plan's checklist to ensure required aspects of a migration plan are included. IT is the intent of the plan to ensure uniform integration with current platforms and/or supporting software, that accessibility and readability verification steps are performed on the source application, the new source application and any archived applications

Responsible Parties Signatures and Dates for Agency

Records or Data Owner Name and Title	Signature	Date
Records or Data Owner Name and Title	Signature	Date
Records or Data Owner Name and Title	Signature	Date
Records or Data Owner Name and Title	Signature	Date

IT Administrator or Manager Name and Title	Signature	Date
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STATE RECORDS COMMITTEE--- APPROVAL OR DISAPPROVAL
IF DISAPPROVED EXCEPTION REPORT 75A NEEDS TO BE ATTACHED

State Records Committee Authority	Signatures	Approved	Dis-Approved	Date
Secretary of State (SS)		<input type="checkbox"/>	<input type="checkbox"/>	
Legislative Audit (LA)		<input type="checkbox"/>	<input type="checkbox"/>	
Attorney General (AG)		<input type="checkbox"/>	<input type="checkbox"/>	
Historical Society (HS)		<input type="checkbox"/>	<input type="checkbox"/>	
Administration (DA)		<input type="checkbox"/>	<input type="checkbox"/>	