IT Records Management

STORAGE PROCEDURES - RECORD CENTER

Please review the following procedures and standards for sending boxes for storage, shredding, and scanning to the Records Center. Failure to adhere to the following standards may result in boxes being denied storage at the Records Center.

STORAGE:

1.   A **Request for Box Transfer** form is required to be submitted prior to delivery of the boxes to the Records Center. After the form is received, the Records Center will contact you and let you know approval to send the boxes to the Records Center is complete.

2.   All files must be sent in approved Records department boxes. These boxes are kept in stock and they are available to you. Please contact the Records Center via IT Service Desk request when you require records storage boxes. Records sent in non-approved boxes will not be accepted and will be returned to the department until the records are transferred into the approved boxes.

3.   Boxes that are being sent to the Records Center for shredding only may be sent in non-approved boxes as these boxes will not be shelved on Records Center shelving. Non-approved boxes include boxes larger than the 1.2 cubic foot standard records storage box, copy paper boxes, moving boxes, etc.

4.   Do not write on the outside of the boxes.

5.   Boxes should include a cover sheet taped to the outside of the box containing a list of the box's contents and a brief description.

6.   A box inventory sheet is required with all boxes. This inventory needs to include any information that could be used to retrieve a file at a later time. Place a copy on top of the contents of the box or submit an electronic version with the **Request for Box Transfer** form.

7.   All files must be in file folders. Loose papers will not be accepted. Please make certain the file folders are properly labeled and only one file per file folder.

8.   All file folders must face the same direction to facilitate rapid retrieval and be in alphabetical or numerical order.

9.   Avoid sending duplicate or unnecessary papers.

10.   Leave approximately 1-1/2 inches (2 finger widths) in the box to facilitate retrieval. Do not over pack the box. This causes boxes to bend and break over time.

11.   Limit the contents of any box to a single record series or category. Generally this is a group of records, filed together in a unified arrangement, which results from the same functional activity. Examples of categories could be date of birth, issue year, or letter of the alphabet. If this is impractical for your department, group files by retention period.

12.   Never combine records with a permanent retention with short-term records.

13.   Do not pack hanging file folders. Lids will not close securely if boxes contain hanging file folders.

14.   3-Ring binders should not be stored in records storage boxes, unless they are placed flat in the box and do not interfere with the lid closing securely.

SCANNING:

1.   Please follow the above storage procedures for sending files to Records for scanning.

2.   Before any files can be scanned and shredded, we must have a signed written agreement from your department authorizing that your files can be shredded after they have been scanned, quality control checked, and indexed.

3.   Avoid sending duplicate papers. Duplicate papers slow down the process.

4.   The Records staff will prep your documents, arrange for scanning, and index your finished documents. Scanned images will be indexed and available in RMS Laserfiche in your appropriate departmental folder.

These parameters are not set in stone and can be adapted for your department's specific needs. Contact Paul Garrison via email or phone at x5565 for any questions or concerns regarding these storage procedures.