

Storage and Retention Requirements

If you intend to use the Records Center to store your department's information, it is important to inform us of their arrival and to use the correct type of box. The small bankers boxes are easier for the staff to handle. They also play a role in helping to identify if the material has been sent to be destroyed or placed in storage.

➔ When to Ship - What to Ship

Review. Records are not kept for any longer than is absolutely necessary for the performance of their required functions. Inactive records requiring retention for several years need to be transferred annually to the records center for storage and maintenance. New guidelines to help in determining the length of time a record is to be retained can be found at [the University System of Georgia Records Management website](#). If you have any questions regarding retention please check out our web page regarding [retention schedules](#).

➔ Storage Box Requirements

Pack. In order for records to be properly stored on the shelves of the Record Center, boxes measuring 12W x 15L x 10H are required. (Copier boxes or the long Bankers boxes can be used for [materials to be destroyed](#).) The boxes need to be neatly organized in their perspective categories as if they are in filing cabinets. Please keep each subject matter filed together as appropriate.

For example, since supervising offices only have to keep personnel files for 3 years, put all the terminated files for the year 2007 in a box in alpha order and either store it in your office or if the files aren't used very often, send it to the Records Center until it's time for them to be destroyed. Locating files is much easier if all personnel records are boxed separately in alpha order (or clearly divided in the box) from other subjects, such as budget information, instead of being all mixed in together.

Storage Checklist

- Review
- Pack
- Label
- Record
- Contact
- Send

➔ Keeping Track of What You Have Sent

<u>Box #</u>	<u>Contents</u>	<u>Destroy</u>
1	19-175	June 2020
<u>From</u>	College Name	
2015	2018 Student exams; 2015	
<u>Thru</u>	purchase requests;	
2018		

Label. See box label example
List on the front of each box:

1. box number
2. department name
3. file years
4. beginning and ending of file
5. control number (e.g. 19-175)

We strongly suggest that your department keeps a **box level inventory** for reference purposes. This information can also be sent us by e-mail. If your department is sending material that is potentially archival it is recommended that you create a **file level inventory**. Please do not hesitate to call if you have any questions.

➔ When You are Ready to Ship

Contact. Once the information is boxed and labeled correctly, fill out the [Box Transfer Storage Form](#). Records Management will email back a control number. **This control number needs to be written on the outside of each box.**

Ship. Departments may choose to self-deliver or hire Physical Plant for delivery. If your department chooses to self-deliver, please notify the Records Center before delivery. Failure to notify the Record Center prior to self-delivering the boxes could result in the records being rejected by the Records Center.

To hire FMD please fill out their [Work Request Form](#). Include the control number in the form.

Sample request form steps:

1. Click 'Report an Issue'
2. Sign in with your UGA login information
3. Click "All Other Work Requests"
4. Select the building in which the boxes are located from the dropdown menu. Complete the rest of location details when prompted.
5. In 'Brief Description of Issue' let them know that you have boxes to transfer to the Records Center. Include the control number. Sample:

We have [*enter total number of boxes to be delivered*] boxes to be picked up from our office and delivered to the UGA Records Center on S. Milledge. Our

control number is/are [*enter control number(s) assigned to boxes from the Records Center, i.e. 22-999*] Thank you.

6. Click Next
7. Fill in any additional details that will help FMD to find the correct room. Be mindful to have someone available to FMD during the time you ask them to arrive. Also let them know if they will need additional equipment in order to get to the boxes.
Examples:
 - ‘These boxes will have to be taken down 2 flights of stairs.’ or
 - ‘These boxes are on pallets.’ or
 - ‘A pallet may be necessary because we have a large number of boxes.’
8. Click Next
9. Enter the financial details
10. Click Next
11. Uploading any available photos can help FMD be better prepared for the pickup
12. Review and submit.