

MARLBORO CENTRAL SCHOOL DISTRICT

RECORDS MANAGEMENT PROGRAM

PROCESS AND FORMS FOR TRANSFER,
STORAGE, AND DESTRUCTION OF RECORDS
PER THE ED-1 SCHEDULE

July 2016

Patrick Witheow

Records Management Officer

MARLBORO CENTRAL SCHOOL DISTRICT

INSTRUCTIONS/PROCEDURES FOR RECORDS MANAGEMENT

PROCEDURES FOR TRANSFER/DISPOSAL OF RECORDS TO MMS STORAGE:

Building/Department Level:

- 1) Transfer files (sorted by record series per ED-1 to 1 cubic foot boxes supplied by RMO officer (Business Office))
- 2) Prepare Record Series Box Label and staple to one cubic foot box (attach copy to Records Transfer Request)
- 3) Prepare Records Transfer Request and submit to RMO Officer (Business Office)

Business Office:

- 1) Complete Business Office Use Section of Records Transfer Request
- 2) Upon receipt in Business Office-Confirm form is completed/date stamp
- 3) Arrange pick-up from transferee by courier via work order. Pick up date is to be entered on Records Transfer Form.
- 4) On date of transfer, RMO or representative must be present to receive the box at MMS (RMO Office)
- 5) Carton(s) transferred to records storage room in Marlboro Middle School (destruction section by year of destruction) destruction date stated in ED-1
- 6) Permanent Record Cartons will be placed in storage area by record series
- 7) Place form in Records Transfer binder by transfer date and copy in Destruction by Estimated Date for Destruction
- 8) Destruction of records will occur each July

MARLBORO CENTRAL SCHOOL DISTRICT

INSTRUCTIONS/PROCEDURES FOR RECORDS MANAGEMENT

PROCEDURES FOR TRANSFER/OF RECORDS TO O/U BOCES FOR PURGING AND EDOC FILMING, THEN TRANSFER/DISPOSAL OF RECORDS TO MMS STORAGE:

Building/Department Level:

- 1) Transfer files (sorted by record series per ED-1 to 1 cubic foot boxes supplied by RMO officer (Business Office)
- 2) Prepare Record Series Box Label and staple to one cubic foot box (attach copy to Records Transfer Request)
- 3) Prepare Records Transfer Request and submit to RMO Officer (Business Office)
- 4) RMO Officer will request quote from O/U BOCES for processing documents and arrange delivery/pick up of records with O&M
- 5) Return purged boxes to MMS (from O/U BOCES when Edoc filming is completed)

RMO Officer (Business Office):

- 1) Complete Business Office Use Section of Records Transfer Request
- 2) Upon receipt in Business Office-Confirm form is completed/date stamp
- 3) Arrange pick-up from transferee by courier via work order. Pick up date is to be entered on Records Transfer Request form
- 4) On date of transfer, RMO or representative must be present to receive the box at MMS (RMO Office)
- 5) Carton(s) transferred to records storage room in Marlboro Middle School (destruction section by year of destruction) destruction date stated in ED-1
- 6) Permanent Record Cartons will be placed in storage area by record series
- 7) Place form in Records Transfer binder by transfer date and copy in Destruction by Estimated Date for Destruction
- 8) Destruction of records will occur each July

MARLBORO CENTRAL SCHOOL DISTRICT RECORDS TRANSFER REQUEST

Originating Office: _____

Date of Request: _____

Title & Description of Records: _____

Dates of Records: _____ Retention Period: ___ Years or Permanent

Verified ED1: ___ Yes ___ No Record Series: _____ Page: _____

Estimate Date for Destruction: _____

Requestor: _____ Principal Signature: _____



For RMO Officer (Business Office) Use Only

I. ___ Destruction of Records-The above named record has become eligible for destruction

II. ___ Transfer of Records-The above named record is eligible for transfer to Records Storage Area

1) Work Order Requested _____ 2) Schedule date of Transfer _____

III. ___ Permanent Record: Transfer to Records Storage Area Placed in _____ Section

Records Management Officer Signature _____

Destruction: The above named records were destroyed as follows:

Records Manager Officer Signature

Date

RECORD SERIES BOX LABEL

RECORD SERIES: # ___ PG. ___ BOX ___ OF ___

RECORD SERIES TITLE _____

YEAR: _____ FROM: _____ TO: _____

RETENTION PERIOD: _____ YEARS OR PERMANENT

DESTRUCTION DATE: _____

RECORD SERIES BOX LABEL

RECORD SERIES: # ___ PG. ___ BOX ___ OF ___

RECORD SERIES TITLE _____

YEAR: _____ FROM: _____ TO: _____

RETENTION PERIOD: _____ YEARS OR PERMANENT

DESTRUCTION DATE: _____