
RECORDS RETENTION PROCEDURES (SUP-P201)

DCSS – Supply Services

1.0 SCOPE:

- 1.1 This procedure outlines the process to follow when the Dougherty County School System Administrative files become inactive and are transferred to the record retention center to be held in storage until they become obsolete and are destroyed.

The online version of this document is official. All printed versions are uncontrolled copies.

2.0 RESPONSIBILITY:

- 2.1 Assistant Director of Purchasing

3.0 APPROVAL AUTHORITY:

- 3.1 Assistant Director of Purchasing

4.0 DEFINITIONS:

- 4.1 RETENTION SCHEDULE – A set of instructions prescribing how long, where and in what form a record series must be stored until it becomes obsolete.
- 4.2 RECORD RETENTION FORM – The form used by transferring schools or departments to list records that they want to be transferred to the Record Center for storage.
- 4.3 NOTICE OF RECORDS ELIGIBLE FOR DESTRUCTION FORM – The form used by the Records Center to obtain the approval by the School or Department Head for final record destruction and to document the destruction of NON-CONFIDENTIAL records that are eligible for destruction and that have been destroyed.

5.0 PROCEDURE:

- 5.1 If storage space in the originating office is a problem or if there are inactive records with a low reference rate, the records with approved retention schedules may be transferred to the Records Center for storage.
- 5.2 Only records meeting the following conditions will be accepted for storage in the Records Center.
 - 5.2.1 Records must be covered under an approved retention schedule.
 - 5.2.2 Transfer must have approval of the Principal or Department Director.
 - 5.2.3 The records must be packed in special records storage boxes only.
 - 5.2.4 Must be accompanied by a completed Record Retention Form.
- 5.3 If you have records that are not covered under an approved record retention schedule number, contact the Administrative Coordinator in the Supply Services Department. It may be necessary to establish a new schedule to cover those records.
- 5.4 Each retention schedule is assigned a number. This number must be included on all boxes and Record Retention Forms.
- 5.5 The procedures that must be followed in order to transfer records to the Central Record Retention Office are listed in the Dougherty County Board of Education Record Retention Manual.

RECORDS RETENTION PROCEDURES (SUP-P201)

DCSS – Supply Services

- 5.5.1 Initial contact with the Records Center is made through a phone call or memo.
- 5.5.2 All “first time” transmitters will be visited by the Records Retention Officer, which is the Supply Services Administrative Coordinator. We will assist them with the procedures to follow involving the transfer.
- 5.5.3 If there is a problem with rodent infestation, a work order will be issued by the requestor to have records fumigated before they are sent so that insects and rodents are not transferred with the records.
- 5.5.4 The way records are received in the records Center is the way they will be stored. Only special records storage boxes, which can be requested through the Supply Services Warehouse, should be used.
- 5.5.5 Non-standard boxes, battered boxes or boxes without completed Record Retention Form will be refused and returned to your office.
- 5.5.6 Boxes must be labeled on one end with a box number, retention schedule number, description of contents, school or department name, and fiscal year group. Do not combine more than one school year. Begin each shipment with box #1 and number boxes consecutively.
- 5.5.7 A Record Retention Form must be completed and accompany the records sent to the Records Center. It will serve as the only record for the school, department, and the Records Center concerning the contents of the boxes that are transferred to the Record Center for storage.
- 5.5.8 Do not send the records until the Records Management Officer has approved your Record Retention Form, then arrangements will be made with the Warehouse to have your boxes picked up and delivered to the Records Center.
- 5.6 Once Records are received by the Records Center, the Record Retention Form is used to check of each box to insure accuracy.
- 5.7 The Record Retention Form is then filed according to destruction date.
- 5.8 Once a record reaches its destruction date and becomes obsolete, a Notice of Records Eligible for Destruction Form will be filled out and sent to the Principal or Department Head that the records belong to. They will be required to approve the final destruction of the records.
- 5.9 Once the records are destroyed according to and in compliance with the Georgia Records Act, the Notice of Records Eligible for Destruction Form will be signed to certify record destruction, and kept on file for further reference.

6.0 ASSOCIATED DOCUMENTS:

- 6.1 Record Retention Form – Form No. SUP-F012
- 6.2 Approved Retention Schedule
- 6.3 Notice of Records Eligible for Destruction Form - Form No. SUP-F013
- 6.4 Georgia Records Act

RECORDS RETENTION PROCEDURES (SUP-P201)

DCSS – Supply Services

7.0 RECORD RETENTION TABLE:

Identification	Storage	Retention	Protection	Disposition
Record Retention Form	Hard copy in Supply Services	3 years, minimum	Maintained in a secure area	Discard as desired
Notice of Records Eligible for Destruction Form	Hard copy in Supply Services	3 years, minimum	Maintained in a secure area	Discard as desired

8.0 REVISION HISTORY:

Date:	Rev.	Description of Revision:
15-Dec-02	A	Initial Release
21-Mar-03	B	Change in Section 5.5.2
23-Oct-03	C	Renamed form in sections 4.2, 4.3, 5.2.4, 5.4, 5.5.5, 5.5.7, 5.5.8, 5.6, 5.7, 6.1 and 7.0. Combined section 4.4 with 4.3. Deletion and addition in section 5.9. Deleted section 6.5.
25-May-04	D	Change in Section 5.3, Records Management Officer to Administrative Coordinator.
17-May-09	E	Deleted Director, Supply Services in sections 2.1 and 3.1 and added Assistant Director of Purchasing.

* * * E n d o f P r o c e d u r e * * *