

## SAN JUAN COLLEGE BUSINESS SERVICES PROCEDURES

TOPIC: RECORDS STORAGE Related to Board Policy: 100 and 507

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### General

Departments are responsible for maintaining orderly files and from time-to-time in boxing and labeling for storage and eventually destruction of all such boxes and contents.

### Storage Boxes

1. Records storage boxes **MUST** be purchased by each department through the Bookstore. Storage Forms (Exhibit 1) are provided at no cost.
2. Please **DO NOT** file records in **HANGING FOLDERS** as they do not allow lids to fit adequately onto boxes and to accommodate our shelving units.
3. **DO NOT OVER-STUFF BOXES**. Fingers should easily fit into both hand openings.
4. **PLEASE** type Storage Ticket and attach to the outside of each storage box and insert a duplicate copy into the storage box. (Exhibit 1).
5. Fasten the **WHITE** copy of the storage Ticket to the **FRONT** of the box by moistening the glue-Treated backing, **PLEASE DO NOT USE TAPE**.
6. Maintain departmental (goldenrod) copies in a central location.
7. Prepare a listing of contents for each box. Insert a copy of the listing for each box in your central departmental files, a copy laid inside the corresponding box, and tape/affix a copy of the listing to the backside of the box's top.

### Storage Form Preparation (Exhibit 1)

1. **SERIAL NO.**: Assign each box a serial number, with the first two (2) digits of the current calendar year (e.g., 00 for 2004).
2. **SHIPMENT BOX NO.**: Number the boxes from 1 up to the total number of boxes stored. If you have 20 boxes to store, the first will be "1 of 20", the second "2 of 20", and so forth. If you do not know ahead of time how many boxes you will have, complete the box numbering step after you have completed all boxes.
3. **SHIPMENT DATE**: Write the date on which you begin typing the Storage Form and enter the same date for all boxes, even if the task is spread over several days.
4. **DEPARTMENT**: Full department name.
5. **DEPARTMENT NO.**: Current account number(s). For example 1-1350 means Personnel Office.
6. **LOCATION**: Identify initial storage area/room in this section.

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7. **SIGNED**: Enter the signature of the person authorizing storage. **PLEASE** write legibly. If you could, also type the name in this box. EACH Storage Form MUST HAVE A SIGNATURE OF AUTHORIZATION.
8. **TITLE**: Title of the person authorizing storage.
9. **DESTRUCTION DATE**: This date is based on the retention period established by State and Federal auditors as well as the intrinsic value of the records and their function within the College. Please refer to the Records Retention and Disposition Schedule. If you are unsure of a record's longevity, contact the Records Coordinator (currently Coordinator of Business Affairs for the Vice President for Business Affairs).  
  
PLEASE do not file records of dissimilar retention periods within the same box.
10. **RECORD DESCRIPTION**: Describe records according to record title or type, even if its just a general description ("Office Files", "Student Records", etc.). Also, include the beginning and ending documents, whether they are filed alphabetically, numerically, chronologically, etc. The efficiency of subsequent retrieval is dependent upon the accuracy of this description.
11. **INCLUSIVE DATES**: Enter the inclusive dates of the records filed in each box. Examples: "2004", "FY 2003-04", April 2003 - June 2004, etc. These dates will aid in identifying and retrieving your records.
12. **SCHEDULE ITEM NO.**: Please refer to the San Juan College Records Retention and Disposition Schedule which identifies the Schedule Item number for many records created and maintained by College departments. If records you are storing are not listed, contact the Records Coordinator to establish a proper number.