

# Records Retention Information & Records Archiving & Storage Cover Sheet Instructions

## Background Information

Class 1 records, also known as permanent records, must be kept indefinitely. These records may be kept in their original form or may be digitized for easier/efficient storage. If you are not sure whether your documents are considered class 1, please refer to the CASBO Records Retention Manual Guidelines posted on the District VO intranet.

Class 2 records, also known as temporary records, are records that must be stored in their original form for a pre-determined amount of time before they may be destroyed. If you are unsure if your records are class 2 or of the time frame in which they must be retained, please refer to the CASBO Records Retention Manual Guidelines posted on the District VO intranet.

Extenuating circumstances such as pending litigation, audits by federal, state and local governments or other entities may cause the records to be retained beyond the periods specified in the CASBO Records Retention Manual Guidelines. Responsibility for identifying such records and preventing their destruction shall rest with the director for each department, the division head, the division custodian of records and the organizational custodian of records.

In addition to facilitating the records retention process, the intention of the form is threefold:

1. to standardize the content description for when records are digitized
2. to describe the contents of the box of records
3. to indicate when the records may be destroyed

## Instructions

- The originating department initiates/completes this form
- If records are for temporary storage, please perform the following before notifying Purchasing/Warehouse for pick up:
  - Complete form for temporary storage and mark outside of box accordingly
  - Records must be placed in a "bankers box"
  - Coordinate pick up with the Warehouse Supervisor
- If records are for permanent storage/digitizing, please perform the following before notifying Purchasing/Warehouse for pick up:
  - Records must be free of staples, paper clips, sticky notes, and may not be attached to or inside a file folder. If a divider is needed to separate documents, a single sheet of paper with description may be placed in front of the respective documents
  - Records must be placed in a "bankers box"
  - Complete form for digitize records and mark outside of box accordingly
  - Records archiving & storage cover sheet must be completed and loosely placed inside of each box
  - Each box must be marked with description and destroy date
  - Coordinate pick up with the Warehouse Supervisor

**SAN DIEGUITO UNION HIGH SCHOOL DISTRICT**  
**Records Archiving & Storage Request Cover Sheet**

(Complete one form per box)

Department/Site

Record Year

Contents (example: W2 forms)

Range/Detail (example: A-C)

Requester: \_\_\_\_\_

Ext.: \_\_\_\_\_

Location of boxes for pickup: \_\_\_\_\_

Date: \_\_\_\_\_

**Type of Storage Requested:**

- Temporary box storage
- Digitize records & destroy originals - (documents must be free of paper clips, staples, & sticky notes)
  - Optical character recognition - (provide keyword search capability)

**BOX #**

**of**

**DESTROY DATE**

1. Clearly & completely fill out form
2. Place form loosely inside box
3. Mark outside of box with description & destroy date
4. Contact Warehouse for pickup