

# Guidelines for sending Record Boxes to Central Office

*In preparation for sending records boxes to Central Office, please review and follow the guidelines below to ensure proper handling and organization.*

**File Purging:** Please review the contents of each box and remove any duplicate or unnecessary records. Only one (1) copy of each document is required for storage.

**Metal Items:** Avoid placing large metal items in the records boxes. Specifically, do not include ring binders, hanging file folders, metal binder clips, or metal spiral notebooks. However, paperclips and staples are acceptable.

**Box Packing and Capacity:** Please use Access branded boxes with a lid, do not use any other box brand or type. Pack boxes with records facing the same direction. Ensure that the boxes are not overfilled. Leave two inches of space between the last file packed and the back wall of the box. We may need to move the boxes periodically, so please do not overfill.

**Records Transfer Request Form:** Please complete the Records Transfer Request form in its entirety. Be sure to include your location, specify the requester's name, and select whether the records are Confidential or Non-confidential. Indicate whether the storage/handling is permanent or temporary. If temporary storage, specify the designated year for destruction. Next, provide a detailed description of the contents in each box to ensure they are easily identifiable by others during future reference or retrieval.

**Submission Process:** Complete one (1) Records Transfer Request form for each box. **The form is the second page of this document.** Place a copy of the completed form inside the corresponding box and email another copy to me. In the subject line of your email, please include the word "Records." If you are sending boxes containing student files, create and save a separate Excel spreadsheet for each box (PDFs will not be accepted) for future submission. The spreadsheet should include each student's full name (last name, middle name, first name), date of birth, and social security number, each in its own column. Be sure the list accurately reflects the contents of the box, as the information will be imported into our searchable database. **Please note that the Excel spreadsheets should not be emailed at this time. I will follow up as to how to submit the Excel documents at a later date.**

**Box Labeling:** Do not tape or write anything on the outside of the boxes.

**Pick-Up and Delivery:** You are responsible for coordinating the pick-up and delivery of completed records boxes from and to Central Office. If you require additional empty record boxes, please let me know, and we will ensure they are available. To request pick-up and delivery of completed records boxes that are ready for storage, please submit an Incident IQ ticket to the Maintenance Department.

Please ensure you are using the most current version of the Records Transfer Request form, which can be accessed by signing into our Cartersville City Schools website and navigating to the "Staff Information" tab on the homepage.

If you are unsure about the appropriate retention period for record documents, I recommend referring to the Local Government Retention Schedule. This comprehensive resource offers categorized guidelines for record retention. Please feel free to reach out to me directly for additional assistance. For direct access, you can visit the Local Government Retention Schedule here: [http://www.georgiaarchives.org/records/local\\_government](http://www.georgiaarchives.org/records/local_government)

# **RECORDS TRANSFER REQUEST**

**LOCATION:**

**REQUESTED BY:**

**SECURITY CLASSIFICATION:**

Confidential

Non-Confidential

**STORAGE/HANDLING**

**DESTRUCTION YEAR:**

**CONTENTS:**

Please e-mail completed form to [cbrackmann@cartersvilleschools.org](mailto:cbrackmann@cartersvilleschools.org)