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| **School / Department:**       |
| Room # or Name:       | Box #:       |
| Prepared by:       | Date of Transfer: (*mm/dd/yr)* |

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| **File Name/Number** | **Date From:** | **Date To:** | **Description of Contents** | **Retention** |
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*See page 2 for “Instructions for Completion”*

*Reference:*

* AP180 Freedom on Information and Protection of Privacy

**Instructions for Completion:**

1. Do not mix different record types - i.e. records that are to be maintained for 2 years with records to be maintained 10 years. Fill the box with the same or similar records series (same retention).
2. Do not overfill the box. Allow a minimum of 1-2 inches free space per box.
3. Do not allow the box to exceed 30 lb. in weight.
4. Use boxes that will fit your shelves; do not use oversized boxes. Do not write extraneous information on the exterior of the box, only the box number.
5. Do not re-box Shannon folders or transfer cases. Treat each one as its own box and number accordingly.
6. The transmittal form can be used to describe a range of boxes, provided they are similar records - i.e. boxes Acct. 960601 to 960623 - Accounts Payable invoices and backup.

**Department**: Accounting **Box #** 960601 to 960623 **Prepared by**: R. Clerk

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| File Name/Number | Date From: | Date To:  | Description of Contents | Retention |
| A/P Invoices | 96/01 | 96/03 | Invoices and backup | C+6 |
| School registers | 84/09 | 88/08 | School attendance details  | T of A + 9 years |
| Meeting Minutes-ASBA | 89/09 | 95/09 | Minutes of meetings | 2 years |

***Keep one copy for your records. Insert the second copy, once complete, into the box on top of the files. Send a third copy to your Records Coordinator.***

1. **Record Owner:** Identify your School, department, section or additional information to assist in record classification. Do not use abbreviations.
2. **Box #:** Identify the box(es) with a box number; if this number is not provided, use a combination of the current year, along with a School name or departmental acronym - i.e. Acct. 960601 [this represents Accounting, 1996 sequential box number 01]. Number boxes sequentially if there are numerous boxes. Each container (regardless of size) should be considered a “box”.
3. **Prepared by:** Identify the person(s) who is/are packing the records for transfer to inactive storage.
4. **Date of Transfer:** Complete this line with the date the records were inventoried and transferred to inactive (or at a minimum, removed from your work area).
5. **File Name/Number:** Identify the file name and number if applicable. **Do not** use general terms such as “General Correspondence” or “Miscellaneous”. If the file content is correspondence, identify the likely subject matter(s) or activity areas documented. Do not use acronyms or abbreviations.
6. **From/To:** Identify the oldest and most current dates of the material on file. Ensure you identify the month and year.
7. **Description of Contents**: In many instances, file titles do not describe actual content. Briefly describe the documents likely to be found on file, especially if general files.
8. **Retention:** If you are aware of the retention schedule of this records series indicate it in this column. You may wish to consult the approved retention schedule for time periods.