

Procedures for Preparing Records for Central Records Store (CRS)

1. **Retention / Disposal - Decision Making** - Use retention schedules as a guide to support service decisions either to retain or dispose of files. Retention schedules are available on the Information Management section of the hub or contact the Information and Records team for guidance. It is recommended that each box only contains files which have the same retention period and disposal date. Services are advised to fully complete all sections of the Storage Recording Sheet including the file type / **SCARRs retention ref** and **retention period**).
2. **Long Term Archive Decision Making - Transfer to Archives** – Does your documentation have historical value? If in doubt please contact the archivist for advice. If in doubt about retention period please consult the SCARRs Schedules (on the hub & connections) or a member of the IM team if unsure.
3. **Rationalisation of Paperwork in Boxes** - Any information currently held in lever arch or ring binder folders should be removed before being placed in boxes
4. **Record / Storage Boxes** - The Records Store specifications have been based around record boxes to maximise space in Unit 10. **Recommended boxes can be purchased from Lyreco. Produce Code 122.898 (standard size) or Product Code 122.661 (small).**
5. **Confidentiality** - For confidentiality reasons the services should not write directly onto the outside of the box. An IM reference number will be allocated on receipt of delivery at the central records store.
6. **Records Storage Sheet Completion – Mandatory Information** - All Information necessary for storage and retrieval should be updated onto the Records Storage Form, ensuring a review & disposal date: (day/month/year) is applied to the box. One Records Storage Form should be completed for each box being stored containing a note of all files contained within a box. A copy of the form should be retained by service.
7. **Health and Safety – Weight Restriction**- Health & Safety recommendations for each box is 12kg / 26lbs as a guide box should be filled 2/3 full. **Boxes weighing more than this recommended weight restriction will not be accepted into the records store.**
8. **Arranging Pick Up of Records** - Once boxes are prepared for storage, email the [Information and Records/ EDC](#) with location and total number of boxes to be uplifted and transferred to Central Records Store. **A member of the IM Team will visit to assess and approve boxes for transfer to the Store..**

Information and Records Management

IM Ref:
(For IM use only)

Storage Recording Sheet

IT IS MANDATORY THAT THIS SHEET IS PLACED IN THE BOX WITH THE CONTENTS SHEET (PAGE 1).

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