

APPENDIX C

INACTIVE STORAGE AUTHORIZATION FORM INSTRUCTIONS

1. Indicate your department and division, if applicable. For example, Business Office – Payroll.
2. Identify the format of the records. **Do not** combine paper and electronic records on the same form.
3. Fill in the form using the office schedule to find the schedule number and retention period.
4. **Do not** fill in the ID numbers or the destroy date. The Records Management Officer (RMO) will assign each carton a number and determine the destroy date.
5. Have your department head sign and date the form.
6. Submit the completed form to the RMO. A maintenance request to move the boxes to storage will be made by the RMO.

NOTE: This form is a table created using Microsoft Word. It is expandable. Please add rows as needed.

There are two forms for authorization to place records into inactive storage. The first is for a single box. The second allows several boxes to be recorded on one form.

SINGLE CARTON SAMPLE

Use the single box form if the carton contains several different series of records or you simply have only one box to store.

OTSEGO NORTHERN CATSKILLS BOCES
INACTIVE STORAGE AUTHORIZATION

DEPARTMENT: ADMINISTRATION - MANAGEMENT
FORMAT PAPER [x] ELECTRONIC []

DOCUMENT DATES	DOCUMENT CONTENTS	SCHEDULE NUMBER	RETENTION PERIOD	DESTROY DATE
2001- 2002	Correspondence	10b.	6	Jan. 2009
1999 – 2002	Contracts – expire 2004	6	6	Jan. 2011
2000 – 2002	Opinion surveys	15a.	6	Jan. 2009
7/1/2007 to 6/30/2008	Telephone call log	28	1	July 2009

NOTES

Review contracts for possible renewal dates.

The above listed records have been placed in inactive storage.

Department Head _____

Date _____

ID # <h2 style="margin: 0;">AD - 12</h2>

MULTIPLE CARTONS SAMPLE

Use the multiple box form if cartons contain one series or only a few series of records and you have several cartons ready for storage.

OTSEGO NORTHERN CATSKILLS BOCES INACTIVE STORAGE AUTHORIZATION

DEPARTMENT: BUSINESS OFFICE – ACCOUNTS PAYABLE

FORMAT: PAPER [] ELECTRONIC []

DOCUMENT DATES	DOCUMENT CONTENTS	SCHEDULE NUMBER	RETENTION PERIOD	DESTROY DATE	ID NUMBER
2004	Purchase orders – A to G	257	6	Jan. 2011	F - 25
2004	Purchase orders – H to M	257	6	Jan. 2011	F - 26
2004	Purchase orders – N to R	257	6	Jan. 2011	F - 27
2004	Purchase orders – S to Z	257	6	Jan. 2011	F - 28
2005	Cancelled checks	110	6	Jan. 2012	F - 29
2008	Bank statements and cancelled checks	109 110	6 6	Jan. 2015	F - 30
2007	Bank statements and cancelled checks	109 110	6 6	Jan. 2014	F - 31
2006	Bank statements	109	6	Jan. 2013	F - 32

NOTES

The above listed records have been placed in inactive storage.

Department Head _____

Date _____

ID #

F – 25 to 32

OTSEGO NORTHERN CATSKILLS BOCES
INACTIVE STORAGE AUTHORIZATION

DEPARTMENT: _____

FORMAT: PAPER []

ELECTRONIC []

DOCUMENT DATES	DOCUMENT CONTENTS	SCHEDULE NUMBER	RETENTION PERIOD	DESTROY DATE	ID NUMBER

NOTES

The above listed records have been placed in inactive storage.

Department Head _____

Date _____

ID #'s

OTSEGO NORTHERN CATSKILLS BOCES
INACTIVE STORAGE AUTHORIZATION

DEPARTMENT:

FORMAT: PAPER []

ELECTRONIC []

DOCUMENT DATES	DOCUMENT CONTENTS	SCHEDULE NUMBER	RETENTION PERIOD	DESTROY DATE

NOTES

The above listed records have been placed in inactive storage.

ID #

Department Head _____

Date _____