Appendix D -
Procedures for Transfer to Corporate Records Storage
to
Town of Newmarket
Records Retention Policy CORP.1-06

Transfer of records to the Records Storage Room at the Operations Centre must be coordinated with the Records Coordinator. When records are identified for transfer they are either inactive or archival. Both types follow the same basic procedures. Records for transfer require approval from the Department Head or signing authority as well as the Records Coordinator.

1. Staff is responsible for identification of records for transfer.

    a. Inactive – records that have not reached their destruction dates or are identified as permanent on the Retention schedule but are no longer needed for regular use.
    b. Archival – records identified as archival by the Records Coordinator. Will require the completion of an assessment report by Records Coordinator before proceeding.

2. Staff is responsible for boxing records into standard 'bankers boxes'.

3. Staff is responsible for the completion of the transfer form. – see template attached.

    a. A list of the boxes or files being transferred should be made for the department.
    b. This information should be transferred to the provided form for authorization.
    c. When possible the retention classification codes should be applied to each file.
    d. If creating a list of boxes rather than files than a summary of the codes should be provided.
    e. Departmental numbering and file naming systems should be entered into the Description field on the form.

4. Department Head or signing authority will verify that records are inactive and sign the transfer form.

5. A copy of the signed form will be sent to the Records Coordinator.

6. Records Coordinator will oversee the physical transfer of boxes.

    a. The Records Coordinator will assign each box a location once the transfer is complete. This will be recorded on the form.

7. A copy of the completed form will be sent from the Records Coordinator to Department.