

KILLEEN ISD
PROPERTY MANAGEMENT SERVICES
RECORDS CENTER WAREHOUSE

JASON BRYAN -- KISD RECORDS MANAGER -- 336-0581
TAMMIE THORMAN -- RECORDS CENTER TECH -- 336-0590

RECORDS STORAGE BASIC GUIDELINES

Each box for storage must contain completed form 285-949.

Place the 3 part completed form in each box to be stored.

(If form is missing, incomplete or incorrect, boxes will be returned to you.)

Please do not tape form to box, must be original 3 part form placed inside box.
(Once we assign the box a location and destruction date at the records center, we will return a copy to you)

THINGS TO REMEMBER:

*******DO NOT USE OLD FULL PAGE TRANSMITTAL LETTER,
ONLY UPDATED HALF PAGE FORMS WILL BE ACCEPTED *******

COPIES ARE NOT A RECORD, COPIES CAN BE SHREDDED AND DO NOT NEED TO BE STORED

(ex of copies: Blue copy of PO, copies of cum folders when the original has been sent to another campus, etc.) Shredding can be done on campus or sent to us.

DO NOT MIX RECORDS SERIES OR YEARS

Items in box should have same destruction date and series #.

RECORD SERIES NUMBER AND TITLE MUST BE ON EACH FORM

THESE CAN BE FOUND ON KISD RETENTION CONTROL SCHEDULE FOUND ON OUR WEBSITE

KISD RECORDS RETENTION CONTROL SCHEDULE CAN BE FOUND ON OUR WEB SITE:

KILLEENISD.ORG, DEPARTMENTS, PROPERTY MANAGEMENT, RECORDS AND INFORMATION MGT

RECORDS MUST BE STORED IN BANKERS BOXES AND EACH BOX MUST CONTAIN COMPLETED FORM 285-949

Both boxes (catalog # 273452) and forms (catalog # 285949) can be obtained from Central Warehouse

ITEMS TO BE SHREDDED CAN BE PLACED IN ANY TYPE OF BOX, AS LONG AS IT CAN BE SECURED

See instructions below. MARK WITH RED "X", AND DOES NOT NEED FORM 285-949

ALL WORK ORDERS TO HAVE RECORDS PICKED UP FOR STORAGE/SHRED MUST BE PLACED IN "SCHOOL DUDE"

PROPERTY MANAGEMENT SECTION: if you do not have access you will have to have the person on your campus who does, place the order in for you

DO NOT OVERSTUFF BOXES (damaged and/or overstuffed boxes may be returned to you)

KEEP IN MIND, IF YOU CAN'T LIFT IT-NEITHER CAN WE

The information you put on Form 285-949 will be the information we use to label the box.
When filling out this form and placing items in boxes, remember, depending on what is needed
and circumstances, you may have to come down and locate your own files.
(Retrieval of records is easier if you know exactly what is in each box.)

*****PLEASE REFER TO THE PEIMS WEBPAGE (Administrative Procedure IX-F) FOR ITEMS THAT SHOULD BE KEPT IN THE CUM FOLDER, ALL OTHER ITEMS IN THE FOLDER SHOULD BE PURGED TO MAKE THEM AS THIN AS POSSIBLE FOR STORAGE.*****

BELOW IS A COPY OF THE UPDATED TRANSMITTAL LETTER

(Once we complete this form here at PMS this will become the label for the box, make sure it is legible)

A copy will be returned to you for your records, keep this information in the event you need to retrieve records from the box.

RECORDS CENTER TRANSMITTAL					
SHADED AREAS 1-7 MUST BE COMPLETE OR RECORDS WILL BE RETURNED					
IN ACCORDANCE WITH RETENTION SCHEDULES THE RECORDS BELOW MAINTAINED BY THIS DEPARTMENT ARE HEREWITH TRANSMITTED TO THE RECORDS CENTER.					
1. CAMPUS/DEPARTMENT				2. SECTION	ROW
EXAMPLE DO NOT COPY, MUST USE ORIGINAL 3 PART FORM					
XYZ HIGH SCHOOL				ATTENDANCE	
3. RECORD SERIES #		4. RECORD SERIES TITLE			SECTION
3275-02B		ATTENDANCE CONTROL			
3 AND 4 MUST COME FROM RECORDS RETENTION SCHEDULE					
FROM YEAR				TO YEAR	
start school year	2010			end school year	2011
6. POINT OF CONTACT		JANE DOE	DATE:	1/1/2013	LOCATION (R. C. USE ONLY)
PHONE	254-336-0000	SIGNATURE	Jane Doe		
7. DESCRIPTION OF ACTUAL DOCUMENTS (SUMMARIZED) IN THIS BOX					
7. (EXAMPLE: A-E, JAN-FEB, 1-10, DR. NOTES, LOGS ETC)					
DOCTOR NOTES A-G					
THIS IS A COPY FOR YOUR CONVIENENCE, DO NOT COPY, MUST USE ORIGINAL 3 PART FORM ORDERED FROM CENTRAL WAREHOUSE					
PROCESSED BY:		<u>(RECORDS CENTER USE ONLY)</u>		DESTRUCTION DATE	
				DATE:	
KISD FORM 285-949		Revised	10/31/2012		

SHADED AREAS 1-7 MUST BE COMPLETE OR RECORDS WILL BE RETURNED

SHADED AREAS 1-7 MUST BE COMPLETE OR RECORDS WILL BE RETURNED

*******ALL SECTIONS HIGHLIGHTED MUST BE COMPLETED OR BOXES WILL BE RETURNED*******

INSTRUCTIONS FOR FORM 285-949: (example is highlighted in green)

1. **Campus/Department:** where records are originating from
2. **Section:** attendance, AP office, counselor, nurse, etc.
3. **Series #:** Found on retention schedule, example - 3275-02B
4. **Record Series Title:** Attendance Reports
5. **Date to and From:** Beginning School year to end School year, example - 2012-2013
6. **Point of Contact:** Person responsible for Records on Campus or sending records for storage
7. **Description:** Actual contents of box, example - Doctors Notes or Daily Attendance Reports

REQUESTING RECORDS THAT ARE STORED HERE AT THE WAREHOUSE

If you need to request Cum Records stored here we will need the following information:
(request should be placed in "School Dude" under Records Management section)

1. CAMPUS RECORDS ARE STORED UNDER
2. STUDENT NAME
3. STUDENT DATE OF BIRTH
4. YEAR RECORDS ARE STORED UNDER
5. WAREHOUSE LOCATION (FROM FORM ABOVE)

ROW:

SECTION:

SHELF:

(PROVIDING THESE RECORDS ARE STORED IN A NEAT ALPHABETIC MANNER, WE WILL PULL THESE AND SEND THEM TO YOU.)

RETURNING RECORDS

THE SAME INFORMATION WILL BE NEEDED WHEN SENDING INDIVIDUAL RECORDS TO BE REPLACED IN BOXES

(DO NOT PLACE COPIES OF HIGH SCHOOL TRANSCRIPTS WITH CUM FOLDERS, THESE ARE STORED ONLINE)

*****OTHER RECORDS MAY BE PULLED AND SENT TO YOU ON A CASE BY CASE SITUATION, DEPENDING ON WHAT IT IS.
KEEP IN MIND WHEN PREPARING RECORDS FOR STORAGE, YOU MAY HAVE TO COME DOWN AND RETRIEVE THESE RECORDS.*****

School Dude Work Order for pick up:

When preparing your old files for turn in, we will need the following information **ON** your

School Dude Work Order:

Shred

YEAR	TITLE	QTY
1980	CLINIC RECORDS	12 BOXES

Our warehouse workers **will not** pick your boxes up without this information so by not adding it to your work order, will slow down the process of getting the work order completed.

Recycle

Papers for recycle, you can just place the work order as such: quantity of boxes to be recycled.

These items are stored and processed differently through our warehouse so they **must** be separated.

If you are placing a work order with both shred and recycle items you will need to mark the boxes so that our workers can differentiate between the two.

STORAGE VS RECYCLE VS SHRED

STORAGE ONLY DOCUMENTS THAT HAVE NOT MET RETENTION DATE!

Each box for storage must contain completed form [285-949](#). (Order from Cent. Whs.)

Instructions must be followed for storage.

Most use a bankers box for storage. Must be stored in File Box (Cent Whs #273452)

RECORDS RETENTION SCHEDULE AND BASIC STORAGE GUIDELINES CAN BE LOCATED ON PROPERTY MANAGEMENT WEB PAGE

RECYCLE ONLY PAPERS WITH NON SENSITIVE INFORMATION!

(MAIL, BLANK FORMS, PRINTED COPIES OF EMAILS, DOCUMENTS THAT ONLY CONTAIN NAMES, WORKBOOKS)

CLEARLY MARK BOXES AS **RECYCLE**

ALSO CAN BE PLACED IN CAMPUS RECYCLE BINS (ANY BOX CAN BE USED)

SHRED ONLY DOCUMENTS WITH SENSITIVE INFORMATION!

(ACCOUNT NUMBERS, EMPLOYEE INFORMATION, STUDENT RECORDS, SS NUMBERS, ID NUMBERS, DOB)

CLEARLY MARK BOXES AS **SHRED**

When turning these items in to be shredded, we will need a list of items you are sending, (example 2007

Cum Records, 2010 Clinic Records, etc.) When you place the work order for items to be picked up, please send an email with list to Jason.Bryan@killeenisd.org and/or tammie.thorman@killeenisd.org so that we can retain this information with our destruction documents or list the items in the work order

(example: 6 boxes 2007 cum folders to be picked up for Shred) **ANY BOX CAN BE USED**

******* ALL BOXES TURNED IN:*******

REMOVE BINDERS, HEAVY FOLDERS, LARGE CLIPS AND RUBBER BANDS

BOXES FOR STORAGE MUST BE BANKERS BOXES, RECYCLE OR SHRED CAN BE ANY TYPE OF BOX

(If labeled incorrectly, boxes will be returned to you.)