

Dobson Records Retention Policy

We have limited space to store records in an on-campus facility. To ensure the integrity of College records, departments wishing to send boxes to the Records Retention area must adhere to the following policies and procedures.

- **Departmental Responsibility** – All departments are responsible for the following:
 - **Packaging of Records** – ***WE WILL ONLY ACCEPT BOXES THAT MEET THE FOLLOWING REQUIREMENTS:***
 - All records must be packaged in the appropriate size boxes (12"x15"x10") with lids.
 - Boxes may NOT include any hanging file folders. These folders cause the boxes to collapse and may destroy records. Also, collapsing boxes can cause dangerous conditions for our employees.
 - Boxes must be completely full. Boxes that are not full can again lead to collapsing boxes, making it dangerous for employees.
 - Boxes must be clearly labeled with your department name, destroy date, section number and a clear description of the contents. Your department will need this description if records need to be retrieved at a later date.
 - Please note: Since all box contents will be destroyed at one time, each box can only be assigned one destroy date.
 - The Records Management Officer provides box labels for your convenience. Contact extension 5960 or records@brockport.edu to request labels.
 - **Requesting the transport of records to the facility:**
 - Departments must complete a Records Retention Request & Instruction Form, found here: <http://www.brockport.edu/accounting/recordsretention.html>
 - This form may be submitted online or by mail. If you cannot gain access to the form, please contact the Records Management Officer at 5960 or records@brockport.edu for a paper copy.
 - The Records Management Officer reserves the right to deny boxes due to space constraints or any violations of this policy.
 - **Records Retrieval:**
 - In order to ensure record security and employee safety, employees are prohibited from entering the Records Retention area.
 - To retrieve records from the area, departmental contacts must complete the Records Retrieval Request Form, found here: <http://www.brockport.edu/accounting/recordsretention.html>
 - This form may be completed online, but must be printed and mailed to the Records Management Officer due to the signature requirement.

- **Records Retrieval (continued):**
 - The departmental contact is required to indicate whether the box will be permanently removed from the Records Retention area or if it will be returned to the area.
 - The Records Management Officer will coordinate the return of any boxes to the area.
 - Once the form is completed, the Records Management Officer will locate the box and coordinate the retrieval with the Facilities and Planning department.
 - The box will then be hand delivered to the appropriate office.
 - PLEASE NOTE: Individual records may not be removed from Records Retention. The entire box will be removed and any changes to the contents of the boxes must be noted on the label and communicated to the Records Management Officer.
- **Destruction of Records:**
 - Individual departments are responsible for determining retention periods for their records.
 - The Records Management Officer has a SUNY Records Retention and Disposition Manual available for your reference.
 - The Records Management Officer will destroy boxes annually (typically between June and August). Boxes marked for destruction will be destroyed (i.e. boxes with a destroy date of 2010 will be destroyed in the summer of 2010)
 - All departmental contacts will receive a list of their boxes prior to the destruction period.
 - Contacts will be asked to review the list and approve the destruction of their boxes. At this time, departments may choose to shred additional boxes from their section or save boxes that they do not want destroyed. This is the only time of year we will accept these types of changes (destroying extra boxes or changing destroy dates).
 - The Records Management Officer will not destroy anything without notifying departmental contacts.
 - At this time, contacts will also be asked to verify their space needs for the upcoming year. We will hold space (if available) until **November 1st**. This space will be awarded on a first come, first serve basis. Departments that fail to indicate their space needs in a timely fashion may lose their current space.

Thank you for your cooperation of the above policy and helping to guarantee the security of College records.