

## **PROCEDURES FOR CREATING NEW FILES/BOXES**

**TO:** KPB & KPBSD Directors, Supervisors and Record Custodians

**EFFECTIVE DATE:** February 8, 2018

**NEXT REVIEW DATE:** April 2020

**REVIEWED BY:** Johni Blankenship, Borough Clerk  
Michele Turner, Deputy Borough Clerk/Records Manager

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### **1. Introduction**

This document sets forth procedures for preparing files and boxes of borough and school district records that are no longer an active record and are to be archived at the Records Center for the remainder of their required retention. Please refer to the approved *Records Retention Schedule* for retention specifics.

### **2. Purpose**

The purpose of these procedures is to ensure records staff can quickly locate and retrieve department records as they are needed and requested. The archival process needs to be accomplished in an efficient and effective manner for all borough and school district personnel and proper preservation of its records. Defining box weight and physical content thereof is established for the safe transfer of records to be archived at the Records Center.

### **3. Files and Box Preparation for Archiving**

Please refer to the Records Management User Guide for the step-by-step instructions on properly entering the department records in the program for archiving.

When preparing the files and boxes for archival storage, the following parameters are necessary:

- Storage boxes of archival quality are to be obtained from the Records Center.
- Entries for each box and its contents will be created in the records management software program, where a barcode will be issued for both the box and each of the files contained therein.
- Files are to be arranged in the box in chronological order by barcode, with the barcode facing forward.
- Archived boxes cannot exceed 25 pounds and must have a minimum of 3" of air space.
- A copy of the box content report, detailing the contents and destruction dates thereof, must be submitted with each box.
- Boxes containing mixed retention dates are not permitted.

For those records that are digitized and linked in the records management software program, please see '*Document Imaging Procedures*'.

These procedures supersede any previous procedures issued and approved under KPB 2.52.040.

  
Wayne H. Ogle, Assembly President

  
Date