

Okanagan College Records Storage

This document will guide you through the long-term records storage and retrieval process at Okanagan College. It is split into three sections:

1. How to prepare your records for long-term storage
2. How to send your records to long-term storage
3. How to retrieve your records from long-term storage

1. HOW TO PREPARE YOUR RECORDS

Only Okanagan College paper records are to be sent to storage; memorabilia, disks or videos should not be submitted.

The following table lists items acceptable for records storage, as well as material to remove from the boxes before submission:

ACCEPTABLE ITEMS	UNACCEPTABLE ITEMS
Paper	Binders / Binding Cases
NCR Paper (No carbon required)	Metal Bulldog Clips
Staples and Small Paper Clips	Carbon Paper
File Folders	Transparencies
Envelopes	Microfiche
	Plastic presentation covers, cards
	Coils from bound booklets
	Disks/diskettes

Boxes: Standard "banker" boxes (8 ½ x 11 x 15) should be used and may be ordered from Facilities Management. If placing material in large envelopes within boxes, do not seal the envelopes.

Retention: Most records sent to long-term storage have a retention period from 1 to 7 years and will be shredded at the end of that time. However, some records must be maintained indefinitely and their destruction date is set to "Do Not Destroy". Contact Deb Matheson at local 4224 if you need assistance determining the retention period.

Labels: Complete one Okanagan College storage label per box and clearly identify ownership (Dept.), contents and the retention/destruction date. To obtain more labels submit a Service Request via MyOkanagan OC Express - Requests and Notices, Records Storage and Retrieval Service Request.

Securely tape the white copy of the label to the inside of the box lid, and write the Box Number on each side of the box in black marker. Send the yellow copy to IT Services, Attn: Records Storage, L104, KLO and retain the pink copy for your records.

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NEW

Effective February 2009, we are implementing another step in the process. Iron Mountain requires that we complete a "transmittal sheet", place one part of a barcode label on the sheet and a barcode on the box in the top left corner at the end of a box. When the boxes are picked up, they will scan each box and take away the completed transmittal sheet. There is room for five boxes per sheet.

Summary

- box paper items only
- use one Okanagan College storage label per box
- tape the white portion of the OC label inside box lid
- write Box Number on box sides in black marker
- send yellow copy to IT Services
- complete Iron Mountain transmittal sheet (5 boxes per sheet)
- place Iron Mountain barcode in the top left corner of the end of the box and the smaller part of the label on the transmittal sheet

2. HOW TO SEND YOUR RECORDS TO STORAGE

Submit a Service Request via MyOkanagan OC Express - Requests and Notices, Records Storage and Retrieval Service Request.

Once the yellow labels are received by IT Services, your data is recorded in the Storage Record Keeping system and IT Services will schedule the boxes for pickup. A representative from the storage facility will collect your boxes - there is no further action required on your part.

3. HOW TO RETREIVE YOUR RECORDS FROM STORAGE

Submit a Service Request via MyOkanagan OC Express - Requests and Notices, Records Storage and Retrieval Service Request.

IT Services will schedule the delivery of your boxes by a representative from the storage facility - there is no further action required on your part. When you wish to return those boxes to storage, simply submit another Service Request.

Please note: up to five boxes are included in the regular delivery fee; emergency, same day delivery can be arranged but is very expensive.