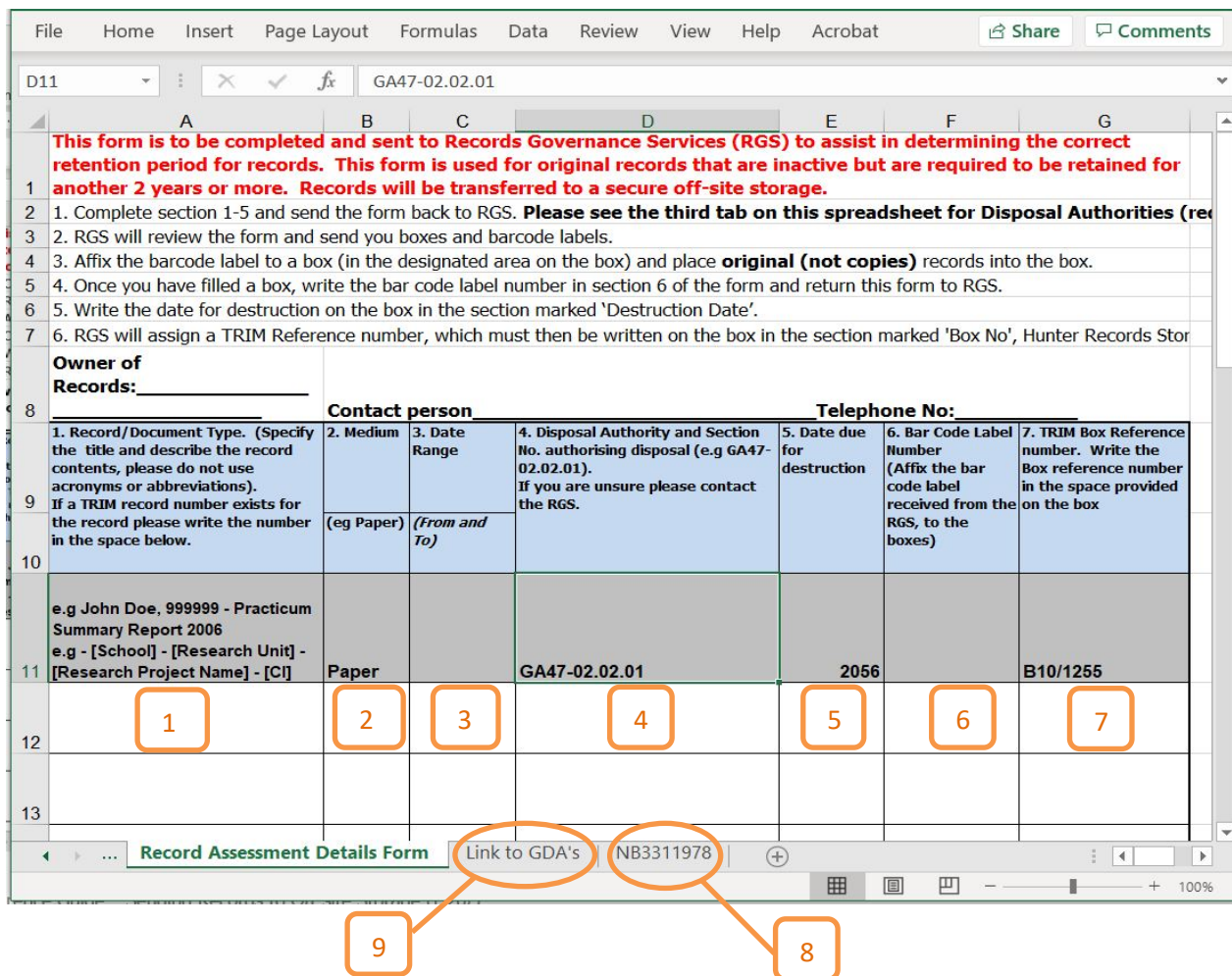


Off-site Storage of Records

There are two ways to store University records - electronically within the University's electronic document and records management system called [TRIM9](#) or in long-term off-site storage. To request off-site storage of records, you will need to complete the [Off-site storage of long-term University records](#) form. This guide will assist you with completing that form.



This form is to be completed and sent to Records Governance Services (RGS) to assist in determining the correct retention period for records. This form is used for original records that are inactive but are required to be retained for another 2 years or more. Records will be transferred to a secure off-site storage.

1. Complete section 1-5 and send the form back to RGS. **Please see the third tab on this spreadsheet for Disposal Authorities (rec**
2. RGS will review the form and send you boxes and barcode labels.
3. Affix the barcode label to a box (in the designated area on the box) and place **original (not copies)** records into the box.
4. Once you have filled a box, write the bar code label number in section 6 of the form and return this form to RGS.
5. Write the date for destruction on the box in the section marked 'Destruction Date'.
6. RGS will assign a TRIM Reference number, which must then be written on the box in the section marked 'Box No', Hunter Records Stor

1. Record/Document Type. (Specify the title and describe the record contents, please do not use acronyms or abbreviations). If a TRIM record number exists for the record please write the number in the space below.	2. Medium (eg Paper)	3. Date Range (From and To)	4. Disposal Authority and Section No. authorising disposal (e.g GA47-02.02.01). If you are unsure please contact the RGS.	5. Date due for destruction	6. Bar Code Label Number (Affix the bar code label received from the RGS, to the boxes)	7. TRIM Box Reference number. Write the Box reference number in the space provided on the box
e.g John Doe, 999999 - Practicum Summary Report 2006 e.g - [School] - [Research Unit] - [Research Project Name] - [CI]	Paper		GA47-02.02.01	2056		B10/1255

Record Assessment Details Form | Link to GDA's | NB3311978

Preparing Records for Off-site Storage

- Records being sent to offsite storage are organised by box. When placing records into boxes, where possible they should be grouped together with based on destruction dates. That is, you don't want to put records that only need to be kept for 5 more years into the same box as records that need to be retained for 50 more years.
- Boxes containing records related to multiple staff or students will need to be indexed by name and staff/student number (see 1 below for details).
- Only put one box per row. Do not spread boxes across multiple rows.

Information Required in Each Section of Storage Form

- Title/Contents** – this section relates to the title/contents of the box. It should be descriptive but concise. If multiple types of records or subjects are contained in the box, provide an overarching title and provide details of the contents on an additional worksheet. Use the box barcode number as the title for the worksheet (see 8).
- Medium** – is it Paper, Electronic, Disc, USB etc
- Date Range** – what time period do the records cover. Years are sufficient. The end date for the records is the most important as this will be used to calculate the destruction date for the whole box.
- Disposal Authority** – This defines the type of record and how long it needs to be kept. Details about this can be found on the "Link to GDA's" tab (see 9).
- Destruction Date** – using the information from section 3 and 4, you calculate the destruction date.
- Barcode** – put the box barcode number here.
- TRIM Box Number** – once sections 1-6 have been completed, return the form to RGS. We will then create a record profile for the box in TRIM and return the completed form to you. Write the number from section 7 onto the side of the box.

Once the boxes are ready to be moved off-site, please email RGS at: records@newcastle.edu.au to request transfer to off-site storage. In the email please supply a contact name, phone number and room number for collection of the boxes.