

# **THE SCHOOL DISTRICT OF ESCAMBIA COUNTY**

## **ADMINISTRATIVE RECORDS RETENTION PROCEDURES**

### General Information:

As of April 2004 the School District of Escambia County (hereafter the District) is contracting for offsite retention, storage and destruction of official District records for certain Administrative Departments. We have moved approximately 1,000 boxes from the Administration Building attic & the Warehouse to storage as well as destroying approximately 1,300 boxes of old files. The storage facility is climate controlled and secure, only authorized personnel are allowed access to the records.

### Contacts:

Mellisa Jones in Accounts Payable will oversee the Records retention process.

Phone # 469-6246    EMAIL: [mjones6@ecsdf1.us](mailto:mjones6@ecsdf1.us).

Gilmore Services  
31 E. Fairfield Dr.  
Pensacola, Florida 32501  
Phone# - 850-434-1054

<http://www.gilmoreservices.com/>

Tom Biggs  
Jacob Gilmore

Account # is 0265.

<u>Current Departments:</u>	<u>Dept #</u>
1. Superintendents Office, -----	4001
2. Court Liaison, -----	4001A
3. School Board, -----	4002
4. School Board Attorney, -----	4003
5. Operations, -----	4101
6. Finance & Business Services, -----	4201
7. Auditing, -----	4202
8. Budgeting, -----	4203
A. Federal Projects	
B. Capital Outlay	
C. Cost accounting	
9. Accounting Operations, -----	4204
A. Accounts Payable	
B. Revenue	
C. Food Service	
1. Food Service Accounting	
2. School Food Services	
10. Purchasing, -----	4207
11. Payroll, -----	4209
A. Payroll	
B. Benefits Accounting	
12. Human Resources, -----	4301
A. Human Resources	
B. Teacher Certification	
C. Ed Support	
D. EEOC	
13. Risk Management, -----	4302
14. Curriculum & Instruction, -----	4401

The personnel authorized to access stored records for each department have been provided to each Department in the form of an Authorized Personnel form.

If this list needs to be amended (additions/deletions) please use the form provided, complete and return to Mellisa Jones in accounts payable for forwarding to Gilmore Services. This list should be amended as personnel retire, change departments or for new hires in your department.

### Accessing Records:

Each Department listed above will receive a list of the records stored and it will be periodically updated. This list will include brief descriptions of the files stored and other pertinent information IE: dates, sequence #s, box #s, destroy dates, etc. A barcode will be assigned to each box referenced on the list.

If a department wishes to access a file, (box) authorized personnel may contact Gilmore Services and supply them with the barcode number for the particular box or boxes to be accessed.

Gilmore Services will pull this box or boxes and have them available for inspection, pickup or delivery. Gilmore Services will have a room available for inspection, copying, file extraction etc.

Please NOTE: there will be a charge each time the box is removed from the racks and returned to the racks, there will also be additional charges for delivery and subsequent pickup.

## Retention of New Records:

Periodically the Departments listed above will need to box and store additional files, the following will apply.

1. Files must be boxed in industry standard storage boxes. The typical legal/letter file storage boxes that we use are industry standard. No odd boxes will be allowed, as Gilmore Services will NOT pick them up.
2. All boxes must be properly and completely labeled, IE:
  - A. Department Name
  - B. Record dates
  - C. Description of contents
  - D. Destruction date
  - E. Florida Record Retention number

This information may be written directly on the box or on available labels, which must be properly secured to the box.

The Florida record retention number and corresponding retention periods (which determine the destruction dates) can be found in the State of Florida General Records Schedules, GS1 and GS7, for Local Government Agencies or Public Schools respectively, and can be accessed at the following website:

[http://dlis.dos.state.fl.us/recordsmgmt/gen\\_records\\_schedules.cfm](http://dlis.dos.state.fl.us/recordsmgmt/gen_records_schedules.cfm)

These schedules may be viewed online or printed for your convenience.

We will check corresponding destruction dates and exceptions must be justified (IE: if you want to keep records beyond the legal requirement). Keep in mind we are paying a monthly storage fee for each box stored.

Retention of New Records: continued

3. When boxes are prepared and properly labeled please contact Mellisa Jones in Accounts Payable.
4. Container Transmittal forms (sample attached) and Barcodes will be provided for your Department, which must be completed and corresponding Barcodes affixed to each box.

The following information is provided for each field that must be filled out on the transmittal form, (see attached sample):

**Account #:** always 0265

**Dept#:** see page 2 for your Dept. #

**Account Name:** Escambia School District & your Dept. name.

**Field 1. BARCODE#** - insert barcode # corresponding to barcode placed on the box.

**Field 2. Customer#** - use this field for the Florida general schedule GS1 or GS7 # appropriate for the corresponding files to be stored.

**Field 3. Destroy Date** - must coincide with GS1 or GS7 retention requirements for type of documents.

**Field 4. Media Type** - size of file box, legal or letter, necessary to determine cubic feet of documents, State required info.

**Field 5. Date Range** - dates ranges of documents in the file.

**Field 6. Sequence Range** - box #s or other pertinent ranges IE: Purchase order #s etc.

**Field 7. Description.** - brief description of file contents.

After completion the forms (both copies) must be submitted to Mellisa Jones in Accounts Payable (you may keep a copy for your files).

Gilmore Services will then be contacted for pickup. The information from the Transmittal forms will be input into their Data Base and updated lists of records stored will be generated and copies will be distributed to each department as soon as possible. Please review the updated lists for accuracy, any changes should be noted and given to Mellisa Jones for forwarding to Gilmore Services where the Data Base may be edited.

These records may be accessed in the same manner as outlined above.

### Destruction of Records:

Periodically lists will be provided by Gilmore Services, which show records that have reached or surpassed their destruction dates. If approval is given these records will be destroyed (shredded) and documentation provided to that effect.

There are 6 blue 95 gallon secure trash bins located in the Administration Building, 75 N. Pace Blvd., which may be used for daily paper trash, particularly sensitive records, keys are available for the ease of use. Contact one of the following for use of a key:

Mellisa Jones, Accounts Payable Dept.  
Tammy Edwards, Payroll Dept.

Gilmore Services has offered the same rates to Schools that may need storage or destruction services. If any Schools have storage or destruction needs and wish to contact Gilmore Services for estimates they are welcome to do so if they have funds available (Internal or Budgeted) as the budget available for the above storage and destruction does not allow for Schools at this time.

The records disposition form is available at the following link:

<http://dlis.dos.state.fl.us/barm/forms/dispositiondoc.doc>

Schools must fill out this form and forward to Mellisa Jones in Accounts Payable for approval.