Local Government Code Title 6, Subtitle C Section 203.048
Care of Records of Permanent Value

The Fort Worth ISD shall adopt rules establishing standards for the proper care and storage of local government records of permanent and non-permanent value.

RECORDS SHALL BE STORED IN A MANNER THAT COMPLIES WITH THE FOLLOWING:

Offers protection from fire, water, steam, structural collapse, unauthorized access, theft, and other similar hazards; and

1. Does not expose records to direct sunlight.
2. Records or storage boxes shall not be stored in contact with the floor.
3. Records stored in a building or storage area shall be protected by an operational fire detection system or the facility must be in compliance with local fire codes.
4. Records will be stored in district-approved boxes.
5. Records will be organized, packed, and labeled in the district-approved method.

RECORDS STORAGE BOX REQUIREMENTS:

Standard letter/legal size records storage box specifications are as follows:

1. Order from the FWISD Warehouse – Stock Catalog
2. Oder number: 60-1530
3. Unit of Measure: EA
4. Description: BOX, STORAGE (PRE-LABELED) (FITS LEGAL/LTR. SIZE FILES) with Lid
5. Unit Cost: 1.93
6. Can be ordered in a 25-unit bundle

RECORDS STORAGE BOX LABEL REQUIREMENTS:

Standard labeling of records storage box specifications are as follows:

1. Complete DRM Storage Box Label Order Form
2. Submit order to DRM
3. DRM will fulfill the order
4. At this time there is no charge for the storage box labels

PACKING RECORDS:

1. Pack only one record series for one year in each box. Records in the same records series, covering the same period, may be added to the box during the year.
   a. When removing records from file cabinets, keep them in order.
   b. If filed in numerical order – place lower number to the front of each box.
   c. If filed in alphabetical order – begin with "A" in the first box.
2. If records in the file cabinets are not arranged in a logical order that can be used for retrieving files, they must be put in order *before* packing boxes. Staff must be able to quickly and easily locate a file with a box.
3. Place letter and legal-size records upright in the box, as they would normally be arranged in a file drawer.
   a. Place letter size records in the box facing the front, toward the label.
   b. Place legal size records in the box lengthwise, facing the left-handed side of the box if viewed from front end the bottom of the page should be toward the label.
4. Storing binders and ledgers in records boxes is not recommended. However, if they are necessary to manage the records efficiently, stack the binders and ledgers on their sides or backs facing the lid of the box. Do not stack above the hand holes.
5. Plastic folders, hanging files, rubber bands, binder clips, and/or other costly filing supplies must be removed prior to storage.

LABEL SAMPLE:

Labels are to be ordered from the District Records Management

Fort Worth INDEPENDENT SCHOOL DISTRICT District Records Management	BOX#	**Storage Box Label**	**Destruction Year** (DRM Use Only)

Department/School #: _____ School Year: _____ Box Number: _____ of _____

Department/School Name: _____

Record Series: ☐ EL ☐ GR ☐ PW ☐ TX ☐ SD   Record Series #: _____

Record Series Title: _____

Range: _____ ☐ Alpha ☐ Numeric ☐ Date ☐ Other

Total Retention: ☐ 2 Years ☐ 5 Years ☐ 7 Years ☐ Permanent ☐ Other: _____

Packing Date: _____ Destroy Month: _____ Year: _____

Description of Contents: _____

_____

_____

_____

FWISD STORAGE BOX LABEL:

<u>DO NOT</u> make copies of this label: District records management will advise you to relabel each box if the official FWISD storage box label is duplicated.

Use a **"BLACK"** permanent marker to print the required information on the district standard storage box labels. Do not use red, purple, or other bright colors, as they tend to fade over time.

RECORDS STORAGE BOX LABEL REQUIREMENTS:

Standard labeling of records storage box specifications are as follows:

1. Complete DRM Storage Box Label Order Form
2. Submit order to DRM
3. DRM will fulfill the order
4. Currently there is no charge for the storage box labels

Instructions for completing each field on the FWISD record storage box label are described as follows:

1. **Box#:** Total number of boxes in a group of boxes
   Example: you have a total of 50 boxes – each boxes are numbered 1-50
2. **Department/School #:** enter your department/school number
   Example: Department – *DRMO = 411* or *Carter-Riverside = 001*
3. **School Year**: enter the year the records were produced
   Example: 2014/2015
4. **Box Number:** the box number indicates the number of boxes in a consecutive series
   Example: Box Number: 1 of 5
5. **Department/School Name:** enter the full department/school name
   Example: District Records Management Office / Carter-Riverside
6. **Record Series:** select the record series SD, GR, PW, TX, AR – The record series number is the same information as the records series number in the FWISD Records Control Schedule.
7. **Records Series Number:** write the records series number that corresponds to your records. If you have problems locating the record series number on the FWISD Records Control Schedule contact District Records Management Office.
   Example: SD3275-01a

8. **Record Series Tile:** *Example:* Attendance Control Documentation
9. **Range:** additional information to describe the contents of the box in more detail. A range can be alpha, numerical, date, grade level, etc.

Example:

Alphabetical	Numerical	Date	Other
A-K	1782-2912	Oct – Dec	1st – 3rd six weeks
L-Z	1st – 4th	02/2007 – 04/2007	1st period – 6th period
ACK-ZUN	400-600	03/01/2004 - 03/31/2004	6th grade – 8th grade

10. **Range Selection:** select Alpha (Alphabetical), Numeric (Numerical), Date, Other
11. **Total Retention:** select the required retention years.
12. **Packing Date:** date the box was packed with records.

   Example: September, 2015   -   10/17/2015 -   May 23, 2016

13. **Spreadsheet Box Number:**
14. **Description of Contents:** a good description should sufficiently identify the contents of the box without opening the container.

   Example:

   Good Description: Daily Registers of Pupil Attendance
                          Parent/Doctor Notes for Attendance
                          Administrator Notes for Attendance

   Poor Description: Student Records
                          Lucille McGillicuddy files
                          Office Files

   A Storage box label must be affixed to each handle side of the banker box

DO NOT store the following: Remove all documents from binders, remove binder clips, rubber bands, and hanging file folders.

Fort Worth
INDEPENDENT SCHOOL DISTRICT
District Records Management

Storage File Cabinet Label

Department/School #:_____ **School Year:**_____/_____ **Drawer #:**_____of _____

Department/School Name: _____

Record Series: EL   GR   PW   TX   SD   **Record Series #:** _____

Record Series Title: _____

Range:_____ ☐ **Alpha** ☐ **Numeric** ☐ **Date** ☐ **Other**

Total Retention: 2 Years   5 Years   7 Years   Permanent   **Other:** _____

Packing Date:_____ **Spreadsheet Box Number:** _____

Description of Contents: _____

_____

FWISD STORAGE FILE CABINET LABEL:

Use a **"BLACK"** permanent marker to print the required information on the district standard STORAGE FILE CABINET labels. Do not use red, purple, or other bright colors, as they tend to fade over time.

RECORDS STORAGE FILE CABINET LABEL REQUIREMENTS:

Standard labeling of records STORAGE FILE CABINET specifications are as follows:

1. Complete DRM Storage Box Label Order Form
2. Submit order to DRM
3. DRM will fulfill the order
4. Currently there is no charge for the storage box labels

Instructions for completing each field on the FWISD record storage box label are described as follows:

1. **Department/School #:** enter your department/school number
   Example: Department – DRMO = 411 or Carter-Riverside = 001
2. **School Year**: enter the year the records were produced
   Example: 2014/2015
3. **Drawer Number:** the drawer number indicates the number of drawers in a consecutive series.
   Example: Drawer Number: 1 of 5
4. **Department/School Name:** enter the full department/school name
   Example: District Records Management Office / Carter-Riverside
5. **Record Series:** select the record series EL, SD, GR, PW, TX – The record series number is the same information as the records series number in the FWISD Records Control Schedule.
6. **Records Series Number:** write the records series number that corresponds to your records. If you have problems locating the record series number on the FWISD Records Control Schedule contact District Records Management Office.
   Example: SD3275-01a
7. **Record Series Title:** *Example:* Attendance Control Documentation
8. **Range:** additional information to describe the contents of the box in more detail. A range can be alpha, numerical, date, grade level, etc.

Example:

Alphabetical	Numerical	Date	Other
A-K	1782-2912	Oct – Dec	1st – 3rd six weeks
L-Z	1st – 4th	02/2007 – 04/2007	1st period – 6th period
ACK-ZUN	400-600	03/01/2004 - 03/31/2004	6th grade – 8th grade

9. **Range Selection:** select Alpha (Alphabetical), Numeric (Numerical), Date, Other
10. **Total Retention:** select the required retention years.
11. **Packing Date:** date the records were filed in the cabinet.

   Example: September 2015 -   10/17/2015 -   May 23, 2016

12. **Spreadsheet:** the month to dispose of the records. (*This field may be left blank*)
13. **Destroy Year:** the year to dispose of the records. Calculate based on the date of the records and the requirements according to the records control schedule or governing authority such as state or federal regulations. Refer to pages 24-27 for year destruction calculation.

   Example: 2007, 2012, 2023 or PERMANENT

14. **Description of Contents:** a good description should sufficiently identify the contents of the box without opening the container.

   Example:

   Good Description: Daily Registers of Pupil Attendance
                             Parent/Doctor Notes for Attendance
                             Administrator Notes for Attendance

   Poor Description: Records
                             Rob Van Winkle files
                             Office Files

DO NOT **store the following:** Remove all documents from binders, remove binder clips, rubber bands, and hanging file folders.

Transferring Records to the District Records Warehouse

Departments and Secondary schools transfer records to the district records warehouse. Elementary school records at this time remain at the school level.

- Once you have your records properly boxed and labeled.
- Complete the records transfer spreadsheet
- Secondary schools: complete RM25-Secondary School Records Transfer
- Departments: Will be given a spreadsheet specific to their department

Once your boxes and spreadsheets are complete

- Email your completed spreadsheet to recordsmanagement@fwisd.org
- Records Management will review for approval the boxes to be transferred to the records warehouse
- Records management will schedule a time and date to have your records picked up and transferred to the records warehouse

Completing RM25- Secondary School Records Transfer Spreadsheet

School Name:				School Number:			
Name of person completing spreadsheet:							
School Year	Records Box Title	Description	Box #	Box Number	of	Box Number
2017-2018	Attendance	1st six weeks Aug-Sept	1	1	of	3
2017-2018	Attendance	1st six weeks Aug-Sept	2	2	of	3
2017-2018	Attendance	1st six weeks Aug-Sept	3	3	of	3
2017-2018	Payroll	Time sheets	4	1	of	1

Information taken from the Storage Box Label

School Name: Enter your school name

School Number: Enter your school location number

Name of person completing spreadsheet: Enter the name of the person completing spreadsheet

School Year: Enter the school year of the records were created

Records Box Tile: Enter the tile of record from the "Record Series Tile" line

Description: Enter a brief description taken from the description box

Box#: Enter the box# from the total amount of boxes

Box Number: The box number indicates the number of boxes in a consecutive series

Completing Departmental Warehouse Records Transfer Spreadsheet

MATHEMATICS - 2019-2020				
Box #	Year	Record Series	Destruction Yr	Description
1	2019-2020	GR1025-26a	2025	2 J Automotive - Academic Supplier

Information taken from the Storage Box Label

Box#: Enter the box# from the total amount of boxes

Year: Enter the school year of the records were created

Record Series: select the record series EL, SD, GR, PW, TX – The record series number is the same information as the records series number in the FWISD Records Control Schedule

Destruction Yr: The year the records are to be destroyed.

Description: Enter a brief description taken from the description box

FWISD FILE CABINET "DON'TS"

NO BINDERS

NO BINDERS

NO PLASTIC FILE FOLDERS

NO BINDER CLIPS

FWISD STORAGE BOX "DON'TS"

NO HANGING FILES

NO BINDERS

NO UNAUTHORIZED STORAGE BOXES

DO NOT OVER-PACK BOXES

NON-RECORD MATERIALS

Note: Non-record materials should not be mixed with "official" records.

The following items (but not limited to) generally are **NOT** records.

1. Stocks of publications and printed brochures that are not originals.

2. Library material acquired and preserved for reference including textbooks, periodicals, and other technical reference materials.

3. Unsolicited announcements, invitations or other materials that are not filed as evidence of business activity or production operations.

4. Preliminary drafts, worksheets, memoranda, and informal notes which do not represent significant steps in the preparation of record documents.

5. Routing slips that contain no pertinent information or approvals used to direct the distribution of papers and correspondence.

6. Personal property such as employee's own copies of personnel file, certificates, training documentation, etc.

7. Extra copies of records in addition to "official" records contained elsewhere. Duplicate copies of records maintained as reading, convenience, tickler, and identical copies maintained with the "official" records are non-records if they are maintained only for reference and convenience and do not contain additional information.

8. Blank forms, file and office supplies, or other items that can be found in the store's warehouse.

9. Papers belonging to another office or file station — they should be routed appropriately.

10. Junk mail.