

# Mount Royal University Records Management Paper Filing Process - Overview

## Filing



Documents created  
[\*Only those with value to the department]

Important Documents/E-mails placed in File Folder  
Assign Folder Retention Code  
ie) AD001

File Folder Labeled  
1) File Title  
2) Retention Code  
3) Retention Code Series  
4) Start Date  
5) End Date:  
(when vol. closed)

File Folder becomes "semi-active"  
Folders only referred to on an occasional basis



## Offsiting

Is the retention period for the folders long enough to warrant Offsiting?  
\*See Retention Schedule

## Onsite Destruction

Box up Offsite Folders  
1) Index contents of box  
2) Place Folders in box with same retention code  
3) Place printed inventory inside box lid  
3) **Contact** University Records for pickup

Offsite Vendor picks up boxes

Boxes retained offsite for extended # of years

Yes

No

Formal Onsite Vendor Destruction  
Create a record of destruction



## Offsite Vendor Destruction

## Permanent Offsite Vendor Storage

Permanent or destroy?  
\*Retention Schedule

Formal Offsite Vendor Destruction

Permanent Offsite Storage

