

Standard Operating Procedure

Review of Destruction-Eligible Boxes (Reviewer 2's Role)

Procedure

1. Boxes will be assigned for review on the REVIEW Tracking List (**O:\RECORDS MANAGEMENT ASSIGNMENTS AND REPORTS\dispositions\DESTRUCTION tracking list.xlsx**) and announced via a group e-mail. Boxes nominated for review are located in the shelving area in the 1-3. They will have the Box Content Form underneath the box.
 - a. Retrieve your assigned box and form.
 - b. Boxes ABOVE the blue line are eligible for destruction; UNDER the blue line are updates or new boxes.
2. Review the Box Content form to ensure that:
 - a. all folders are listed in the inventory
 - b. missing folders are indicated
 - c. empty folders are indicated
 - d. serials or multiples are identified
 - e. if any of the folders are on Litigation Hold
 - i. if there is a lit hold, the box cannot be destroyed
 - f. the box and folder descriptions are complete and accurate according to the patterns document (O:\Records management manuals, guides, procedures\Records Management Department Policies\Patterns)
3. If the box is eligible for destruction
 - a. Make sure that the retention has elapsed.
 - i. For time-based series, add the number of years to the End Date
 - ii. For event-based series, check the Folder Event Date entered by the analyst and add the number of years to the Folder Event Date.
 - b. Make sure there are no lit holds
 - c. If all folder descriptions, dates and record series have been entered correctly and accurately and no "Lit Holds" are applied, then the box can be destroyed.
 - d. Place the box in the 1-4
 - e. Check to see if any folders in the box contain electronic documents. If there are documents associated with a folder, you will need to destroy that folder (and no other folders):
 - i. Select the folder with documents;
 - ii. Under Advanced, select Add to Session;
 - iii. Under session number, enter the box number which contains the folder in question;
 - iv. Status: Destroy;

- v. Click on Okay;
 - vi. Once the session has been created, you will need to complete the destruction session by processing the order.
 - vii. Under Functions, select Sessions;
 - viii. Retrieve session you just created (session number is the number of the box);
 - ix. Look for the tab DispoProcessing;
 - x. Check the Run Actual Disposition box in the top right corner;
 - xi. Check the Delete Document box in the lower left side of the screen;
 - xii. Insert Action Destroy;
 - xiii. Okay.
4. If the box is not eligible for destruction
 - a. Returns go in 1-1
 - b. New boxes in 1-2
 5. After reviewing all of the boxes that you have been assigned, update the REVIEW Tracking List with the date of the review and if the box can be destroyed.

Notes

To review the Event Dates for IDA projects, log on the Compliance database, look for the project in question and in the project details screen, look for the Retirement Date. For contract end dates, check Project Central Contracts database, contract registration dates, and materials inventoried on ARM.