



Transferring Temp Records to Exempted Agency Facility

	PROCESS	DESCRIPTION
1	Has exemption to store records within an agency facility been sought?	Agency needs to seek exemption to store temporary records within their facility. Agency to complete the required documentation and forward this to State Records for approval.
1a	NO - Refer to Procedure - <i>Approval for Secondary Storage of Temporary Records</i> other than with an Approved Service Provider	Agency to refer to Procedure – Approval for Secondary Storage of Temporary Records other than with an Approved Service Provider for the appropriate process and requirements.
2	YES - Divide record series into consignments ¹	Prior to transfer group records into series. Once the records have been grouped, divide into consignments according to disposal action. eg destroy in 2 years, 5 years or 7 years. A GRS number ² or consignment number is not required when transferring records to an agency facility. GRS numbers and consignment numbers are only associated with transferring permanent records to State Records custody.
3	Obtain storage boxes	Obtain appropriate storage boxes. Contact State Records who can advise of appropriate boxes to be used/purchased.

¹ State Records defines a record series as records or archives having the same origin and which belong together. eg. same system of filing, same format, same type etc.

² State Records allocate this number after receiving a Series Registration from an agency. This only applies to permanent records.

	PROCESS	DESCRIPTION
4	Box records	Place records in the box in a logical order, numerical, alphabetical, file number or chronological.
5	Prepare lists	<p>Prepare a detailed list of the records to be transferred to the agency facility. The list should enable records to be retrieved efficiently.</p> <p>Lists should detail file numbers, file names, dates, disposal authority used and box number.</p> <p>Do not send copies of temporary listings to State Records. Lists are to be maintained by the agency.</p>
6	Label or barcode boxes	Label or barcode boxes to enable the retrieval process.
7	Agency to maintain transfer documentation	<p>Maintain all documentation for future reference. This includes:</p> <ul style="list-style-type: none"> • Lists of records that have been sent to secondary storage. • Approved Intention to Destroy Temporary Records Reports. • Destruction certificates. • Annual summaries. <p>This information will assist your agency in completing annual summaries to State Records.</p>
8	Submit to State Records <i>Annual Summaries of Temporary Records Storage Report</i>	<p>Within 14 days of 30th April submit <i>Annual Summary of Temporary Records Storage Report</i> to State Records.</p> <p>Report template available from the State Records website – http://www.archives.sa.gov.au</p> <p>FINISH</p>