



San Diego Unified School District

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COR-O-VAN RECORDS RETENTION FREQUENTLY ASKED QUESTIONS (FAQ's)

Q. Why is the District using an off-site records storage facility?

A. The District is using an off-site facility to store records to centralize and better manage the documents it is required to maintain in perpetuity to comply with statutory and regulatory requirements. Records are currently stored in buildings that are not in controlled environments and do not have fire suppression systems. Use of the Cor-O-Van storage facility will free-up valuable on-site space and guarantee a secure environment for the records.

Q. Where is this storage facility located?

A. Cor-O-Van Records Management, Inc. is located at 12375 Kerran Street, Poway CA 92064, (858) 748-1100 ext. 1286

Q. What are the benefits of records management?

A. Records enable and support the district's work to fulfill its mission. Every organization, including school districts, must address well-defined objectives that add value, either by achieving the organization's goals or by reducing costs. Since records contain information, a valuable resource, it is essential to take a systematic approach to the management of records. Records management:

- Contributes to the smooth operation of district programs by making the information needed for decision making and operations readily available
- Helps deliver services in a consistent and equitable manner
- Facilitates effective performance of activities throughout the district i.e. audits, reviews, etc.
- Protects the rights of the district, its employees, and students
- Provides continuity in the event of a disaster
- Protects records from inappropriate and unauthorized access
- Meets statutory and regulatory requirements including archival, audit, and oversight activities
- Provides protection and support in litigation
- Allows quicker retrieval of documents and information from files
- Improves office efficiency and productivity
- Provides better documentation more efficiently
- Supports and documents historical and other research
- Frees up office space for other purposes by moving inactive records to storage facilities
- Avoids unnecessary purchases of office equipment or on-site storage containers

Q. Who can use this service?

A. This service is available to every school and department in the District.

Q. Is the use of this facility mandatory?

A. Some departments will be required to use this service due to the large number of records that they generate and are required to maintain and the lack of storage space available. For example, all of the records that are currently stored in Annex 1 and Annex 4 will be moved to the Cor-O-Van facility. For others, this service is optional but is recommended especially where current record storage takes up valuable space or creates a safety or fire hazard.

Q. Who pays for this service?

A. Each school or department will be responsible for the storage fees associated with their own records or records they are required to maintain. However, Cor-O-Van has offered the district six (6) months of **free** storage and six (6) months of **free** pick-up from the first date of pick up. After that, storage costs will be minimal. For example, the cost to store one banker's box is only .15/month.

Q. Are there other costs involved?

A. It depends on your site's need and the frequency to access stored records. Primary charges are associated with retrieving and transporting records to and from storage. However, with a little planning you can minimize these costs by ordering multiple records to be picked-up and/or delivered at the same time. A typical example is the retrieval and return of a box or file from the Cor-O-Van facility. To retrieve a file there will be a retrieve for delivery charge of \$1.60 per file and a transport charge of \$.80 per file; for a total one-way cost of \$2.65 per file. When this file goes back to storage there will be a transportation charge of \$.80 per file and a refilling charge of \$1.60 for a total return charge of \$2.40 per file; this is a round-trip charge of \$5.05 per file. Each time Cor-O-Van comes out to a District location there is a trip charge of \$5.00 for next-day delivery. Scheduling new boxes to be picked at the same time boxes that had been previously retrieved on a single trip will reduce the costs of using this service. A list of services and rates are attached with this handout. If you have further questions, please contact Cor-O-Van Customer Service at (858) 748-1100 ext. 1286.

Q. How do we place an order to retrieve a record?

A. There are several options but the District is electing to use the web-based option. Each school site or department using the service must designate a "Records Custodian" and an "Account Manager" to set up an account and acquire a user name for web access. Logging in to your account will give you the ability to order any services, access inventory, track shipments, view account history, and generate reports. Cor-O-Van will train each site on the use of the web-based system.

Q. Can records be put in the storage facility as is?

A. A banker's box is used as the standard container for records storage. If your records are currently in a banker's box that is in good condition, you will not have to transfer the records before they can be placed in storage. Otherwise, your records may have to be transferred into a new container.

Q. How do you know what is in what box?

A. Prior to records being sent to Cor-O-Van for storage, all records must be identified and labeled for proper inventory by using the "Container Transmittal" form.

Q. How do we know how to identify the records and label the boxes?

A. Cor-O-Van will provide web training as well as individual training for each department that has to inventory and store records. You may also access a general procedure manual and as well as regulatory requirements on-line at: <http://www.sandi.net/legaloffice/recordsretention.html>

Q. How do we know the records are safe and secure or won't be lost?

A. Cor-O-Van records centers are state-of-the-art facilities designed specifically for records storage and comply with all current fire and safety codes. The facility is monitored twenty-four hours a day and has daily inspections and testing of their security devices. All records are stored for easy access. They are scanned in and out each time they are moved and returned to their original location, followed by an auditor to verify all items are accurately recorded.

Q. How will we be billed?

A. Your site will be billed on a monthly basis and you will have access to track your expenses by logging in to your account and view your monthly activity.

Q. Who do I call if I have a problem or a question?

A. Cor-O-Van's qualified administrative staff provides customer service and support Monday through Friday, 8am to 5pm, where you are guaranteed to speak with a representative each time you call. The phone number is (858) 748-7202. You can also contact the District's sales representative, Stuart Johnson, at (858) 748-1100 ext. 1286 or by cell phone (858) 349-0728, if you have a question the customer service team was not able to answer.