



## SAN DIEGO COMMUNITY COLLEGE DISTRICT

### Administrative Procedure

### CHAPTER 6 – BUSINESS AND FINANCIAL SERVICES

#### AP 6550.2 Storage and Disposition of Records

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Office of Primary Responsibility:

Vice Chancellor of Business Services  
Director of Purchasing and Contract Services

This procedure is applicable to all District offices where recorded information or copies thereof, without regard for the medium in which recorded, are created, stored, received or used in the conduct of District business.

#### FUNCTION

##### 1. Definitions

- a. Recorded information means all papers, reports, database and output, correspondence, and multiple copies thereof, without regard for how it is recorded, but which are created or received during the conduct of District business.
- b. Detail information is the forms, memos, data creation sheets and other original documents which are used to effect actions or transmit information (including general correspondence).
- c. Summary information is the display/report/ledger used to account for or consolidate the information collected.
- d. Records retention schedule(s) specify for each record or group of records:
  - How long they will be kept in the office
  - How long they will be kept in storage
  - When they will be destroyed
  - If they are the Office of Record file copy
  - If the records contain sensitive information (see paragraph 2 under regulations) and access must be restricted by law.
- e. Records are those pieces of recorded information which are classified under the provisions of Title 5, California Administrative Code during the years following their creation or receipt.

- f. Office of Record File is the functional area (office of primary responsibility) master file which contains the original, most complete and up-to-date information needed or required by the District.
2. Title 5, California Administrative Code, Section 59020 et seq., is the primary governing regulation under which the District must classify and retain or dispose of its records.

## REGULATIONS

1. The administrator of each office, designated under Section 59027 of Title 5, is to review the recorded information received or produced during the previous year and to classify it for retention or disposition under the provisions of law. The administrator of an office exists at any level where responsibility has been assigned or responsibility exists as an inherent part of the duties assigned.
2. Recorded information and copies thereof without regard for the medium of recordation and which is about:
  - a. an identifiable student;
  - b. an employee;
  - c. internal District operations as defined in Section 6254 of the Government Code; and shall be treated as sensitive information. Disposition shall be through the records retention and disposition channel or if not classified as records shall be transferred to the Central Distribution Center in a properly labeled approved container.
3. All recorded information classified as a record shall be classified in the office possessing the recorded information and either retained in the office or if transferred, be properly labeled in an approved container to the Central Distribution Center's Records Storage, and the transfer recorded on a office records log retained by the originating office.
4. Records classified Class 2 Optional shall not be transferred to the Central Distribution Center until classified either Class 1 Permanent or Class 3 Disposable.
5. Records shall only be accepted by the Central Distribution Center when they are identified with properly completed label forms and enclosed in approved containers as prescribed by this procedure.
6. Records shall not be destroyed by the District except via shipment to the Central Distribution Center.

## IMPLEMENTATION

1. The administrator of each office (see paragraph 1 above under REGULATIONS) shall:
  - a. Establish and maintain a continuing office records log;

- b. Annually review all recorded information received or produced during the previous school year; classify it in accordance with Title 5 California Administrative Code, sections 59020 et seq.;
- c. Effect retention/disposition under the provisions of this procedure;
- d. Use only an approved container box (known as a Bankers Box) for records identified as Class 1 and 3. Box must have a security string-and-button closure and only the following two (2) sizes are accepted: 12"x24"x10" or 15"x24"x10". Records identified as Sensitive may be transferred in any size box, as these records will be destroyed quickly, not stored.
- e. Identify and use the following appropriate SDCCD Business Services Form (commonly referred to as Records Storage Label) for each container:
  - AP 6550.2a, Sensitive Information
  - AP 6550.2b, Class 3 Disposable
  - AP 6550.2c, Class 1 Permanent
- f. Place or affix appropriate label form in three (3) specific locations in/on each container box: 1) inside on top of contents, 2) on one side, 3) on front.
- g. Make arrangements to transfer all Sensitive, Class 1 and/or Class 3 records to Central Distribution Center. Record boxes must be properly labeled.

2. The Central Distribution Center shall:

- a. Effect continuous disposition of recorded sensitive information received in containers and identified as sensitive;
- b. Transmit a listing of Class 3 Disposable records to the Vice Chancellors and Vice Presidents upon the expiration of the "destroy after" date noted on Form AP 6550.2b. The listing shall contain information taken directly from the form;
- c. Supervise destruction of all District records;
- d. Retain the certified destruction documents upon completion.

References: BP 6550

Title 5 California Administrative Code, sections 59020 et seq.  
SDCCD Business Services Forms, posted on Purchasing's website

Supersedes: Procedure 2300.1, 9/22/78, 2/19/80

Approved by Chancellor:

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Date

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Constance M. Carroll, Ph.D.

Reviewed by Cabinet on 9-22-09 and approved by concurrence.