

COUNTY OF AMADOR – RECORDS MANAGEMENT
RECORD REQUEST FORM (RM5)

INSTRUCTIONS

In order to **retrieve** records from the County Records Center, **refile** returned records, or **interfile** new records, use the following procedures:

RETRIEVALS – Removal of records from the County Records Center.

Only entity, which deposited the records, may retrieve them from the Records Center. Other county departments or members of the public need to contact the depositing entity and have them initiate all requests for records.

The entity depositing the records is responsible for keeping the Records Management staff informed, in writing, of all employees authorized to request or have access to its records.

The Record Request form must be typed. **A separate form needs to be completed for each item requested.**

- Enter the AGENCY/DEPARTMENT, DIVISION, and DATE of request.
- Enter the REQUESTOR (first & last name).
- Enter the PHONE/EXT number of the Requestor.
- Enter the individual for whom the record is being REQUESTED FOR (first & last name); only if different than the Requestor.
- √ Check the box next to RETRIEVE. Indicate whether or not the record will be returned by marking the box next to YES or NO.
- Enter the **DATE** the document is **NEEDED**. Please do not use ASAP. Please keep in mind the **DATE NEEDED** section is important to accurately **input a date** when the record is actually **NEEDED**. Please allow as much time as possible.

Records that have been reactivated should **not** be returned to the same box because they will have a different destruction date from the existing records in the box. These records should go into either a new or existing box with similar records that will be destroyed the same date.

- Enter the Records Center PERMANENT BOX NO; from the Box Inventory Report (BIR) or Audit Report.
- Enter the Records Center BOX LOCATION & SPACE NO; from BIR or Audit Report.
- √ Check the box next to “SEND ENTIRE BOX” if **all** of the contents of the box are needed. Please consider this carefully as it is more efficient to retrieve and deliver a folder rather than a box.
- Enter the FILE/FOLDER BARCODE NO. (if box is indexed); from the BIR, if applicable.
- Enter the FILE/FOLDER TITLE (if applicable).
- Enter OTHER INFORMATION (if applicable); if additional descriptive information would be helpful for retrieval purposes.

The Requestor sends the completed Record Request form to Records Management electronically.

Records Management staff will retrieve the record (or note why it could not be retrieved) and send a copy of the Record Request form and the record to the Requester. Please keep the Record Request form attached to the record if it is going to be returned to the Records Center.

INTERFILES – Adding new records to storage boxes at the Records Center.

- √ Check the box next to INTERFILE NEW MATERIAL on the Record Request form.
- Complete the following portions of the Record Request form: AGENCY/DEPARTMENT, DIVISION, DATE, REQUESTOR, PHONE/EXT, PERMANENT BOX NO., BOX LOCATION & SPACE NO., and FILE/FOLDER TITLE.

REFILES – Returning records previously received from the Records Center.

- Utilize the copy of the Record Request form that is attached to the record.
- √ Check the box next to REFILE and enter the date that the material is being returned to the Records Center and initial.

IF YOU HAVE ANY QUESTIONS, PLEASE CONTACT RECORDS MANAGEMENT STAFF AT EXT. 731.