#### National Archives and Records Administration

Federal Records Management Level 1: Disposition

Module 5: Manage Records Held Off-Site

Participant Guide

# Module 5: Manage Records Held Off-Site

## Module 5 Checklist

* Complete this online module.
* Take time to locate and review your agency’s policy and guidance for off-site records storage.

## Module Goal and Objectives

* Given a situation in which records have been transferred off-site, you will be able to respond to business needs to locate the records in a timely fashion.
* In this module, we’ll learn to:
  + Explain the importance of tracking records held off-site.
  + Complete a reference request to a records center.
  + Describe the process for refiling records held off-site.
  + Describe the process for interfiling records held off-site.

## Why keep track of off-site records? Notes

## Tracking Records Held Off-Site – Notes

## Reference Requests – Notes

## Refiles – Notes

## Practice – Let’s Retrieve Some Records

## Sample box list for Practice: Take a Memo

**Box/Folder List for Transfer PT-901-2018-0002**

**Series 670, Legal Case Files**

| **Box Number** | **File/Case Identifier** | **Start Date** | **End Date** | **Additional Information** |
| --- | --- | --- | --- | --- |
| **1 of 2** | **Abbott, N-2017** | **04/01/2017** | **11/11/2017** |  |
| **1 of 2** | **Agarwal, P-2017** | **03/11/2017** | **12/09/2017** |  |
| **1 of 2** | **Baines, A-2017** | **06/26/2017** | **09/18/2017** |  |
| **1 of 2** | **Flores, L-2017** | **01/28/2017** | **08/16/2017** |  |
| **1 of 2** | **Flynn, S-2017** | **02/16/2017** | **07/13/2017** |  |
| **2 of 2** | **Galanos, G-2017** | **05/05/2017** | **12/01/2017** |  |
| **2 of 2** | **Guzman, W-2017** | **08/21/2017** | **11/22/2017** |  |
| **2 of 2** | **Jeffries, H-2017** | **02/13/2017** | **09/26/2017** |  |
| **2 of 2** | **McDonald, J-2017** | **08/10/2017** | **12/03/2017** |  |
| **2 of 2** | **Neruda, P-2017** | **05/16/2017** | **07/18/2017** |  |
| **2 of 2** | **Roberts, E-2017** | **07/21/2017** | **10/22/2017** |  |

## Notes