**Purpose**

To describe the process used by the Harborview Transfusion Service for Storage and retrieval of documents. All documents are retained in accordance with the Document Retention Policy.

**Background Information**

The Harborview TSL maintains active in lab storage for documents up to one year as space permits. After that documents are forwarded and archived through the UW Medicine Records Management Services (RMS). UW-RMS manages the transfer, storage, retrieval, destruction, and preservation of all archived documents, per the UW Medicine Records Retention Schedule (UWMRRS).

**ARCHIVE / RETRIEVAL PROCESS**

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| **Responsible Party** | **Action** | **Related Document** |
| **TSL Staff** | **Preparing Archive Box*** Use standard Banker’s Box: 10X12X15 inches.
* Select documents confirmed ready for archival.
* Whenever possible box documents with similar retention schedules.
* Box must be ¾ full or weigh >35 lbs, with a secure-fitting lid.
* Do not include hanging files.
* Ring binders are acceptable but should be placed at one end of the box.
 | * Quality Policy: Records Retention
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| **TSL Staff****Responsible****Party** | **Documentation of Archival*** Open the Archive Folder on TSL Lilith Drive
* Open the Transfer Inventory Spread Sheet
* Select the tab for the current year and scroll down to next entry line.
* Enter the next sequential Box number and name of the documents and the corresponding date range for each box to be archived.
* Save the changes.

**Action** | **Related Documents** |
|  | **Labeling the Boxes*** Using a permanent marker, number the boxes in the batch in sequential order, starting with the next number on the list in the database, and write the box number on the bottom left corner, short side of the box.
* Write the TSL Group number 50-31-1 on the upper left corner, above the box number.
* Write the Department Name, Box contents, and date range in the middle portion of the box.
* NOTE: Labels, taped messages, indexes, or post-it notes cannot be attached to the outside of the box.
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| **Transfer** | **Records Transfer Inventory Form*** Fill in the Record Transfer Inventory Form, which is an electronic form in the Lilith TSL archiving folder.
* Place a copy of the form inside each box.
* Request for box pick-up by faxing the form to UW Records Management Services: 206-598-1224.
* Place a copy of the form in the Archive folder located in the bottom right drawer of the lateral file cabinet in the main lab.
* Place a copy on top of the boxes being shipped for courier reference.
 | UWMC Records Transfer Inventory Form  |
| **UWMC archival** | * UW Records Management Services will assign the accession number for each shipment as it is received into their system.
* UW Records Management will notify the designated Record Coordinator for the department. For TSL this is the Quality Coordinator.
* The RC will then update the Archive records with the UWMC Records Accession number for the boxes archived.
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| **Retrieval** | * Email UW Records Management Services (RMS) the request for retrieval @ hrc@uw.edu
* Include the accession number and box number of the records being retrieved.
* Indicate the urgency of the need. Turn-around time is dependent upon the number of boxes being retrieved: 103 boxes could take up to 24 hours.
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| **Returning Retrieved Boxes to archive** | * Previously retrieved boxes can be returned alone or with new boxes for archive.
* Email the request for return of retrieved boxes to hrc@uw.edu. Include the box numbers and the fact that they are previously archived boxes being returned after retrieval.
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**Reference**

Standards for Blood Banks and Transfusion Services, AABB, Current Edition.

UW Records Management Policy