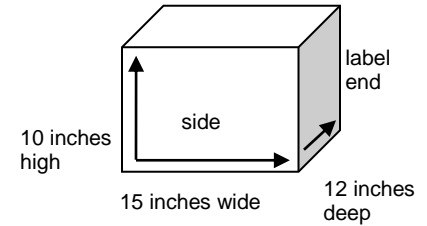


So you want to store some research records? Here's how.

What you need:

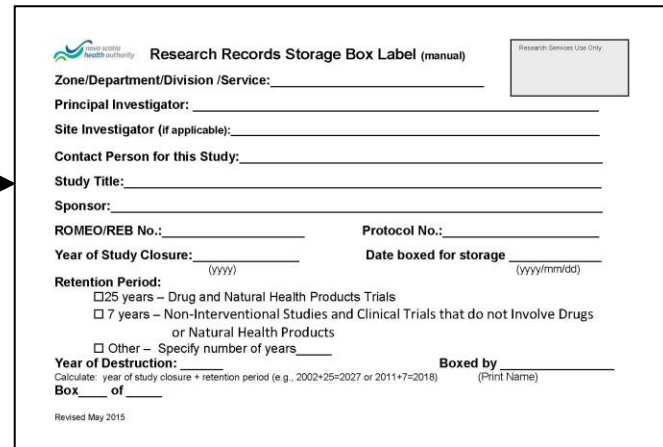
1. Records storage boxes: purchased storage boxes size 12x15x10 bankers box
No other boxes (like supply boxes or plastic bins) or larger size boxes can be used.
2. Box label: use *Research Records Storage Box Label** (See below.)
3. File folders, plastic cable ties
4. Several hours to organize the boxes you intend to store
5. To know the study retention requirements:
 - a) 7 Years: Non-Interventional Studies and Clinical Trials that do not Involve Drugs or Natural Health Products or
 - b) 25 Years Drug and Natural Health Products Trials or
 - c) another retention period required for a specific reason



Steps to prepare records for storage:

Paper Records

1. Review the files you plan to transfer. **Only research study materials** may be stored—**no** non-study documents.
2. Must do's:
 - a. Remove all binders and insert plastic cable ties through the holes.
 - b. Remove all hanging file holders and place records in file folders.
 - c. Remove all blank forms, extra copies of brochures, etc.
 - d. Remove all duplicates, including copies of originals held by others.
 - e. Remove all devices, equipment and non-record items.
 - f. Place a reasonable number of files in each box – it must not be too heavy!
 - g. Place files upright, not flat.
3. Fill in one *Research Records Storage Box Label** **for each study**. Fill in just the total number of boxes (e.g., Box ____ of 12).
4. Photocopy one label for each box. Then fill in the box number (e.g., Box 1 of 12) on each label.
5. Photocopy one completed label for Research Services' use.
6. Affix a label sleeve (available from Research Services) to the end of each box. Slide a box label into each sleeve.
7. Fill in a *Storage Box Content List** for each study. This is a record of which box contains which document. This will help you when you need to retrieve a document. Keep copies of the list in your office.
8. Contact the Research Services Administrative Assistant to arrange a time to transfer the boxes to Research Services.



NEVER UNDER ANY CIRCUMSTANCES LEAVE BOXES UNATTENDED IN HALLWAYS OR UNSECURED AREAS. BOXES CONTAIN CONFIDENTIAL PATIENT INFORMATION AND MUST BE PROTECTED!

9. Complete Part A of the *Memorandum of Transfer and Receipt of Research Study Records** form. E-mail it to the AA.
10. Transfer the labeled boxes, the retrieval authorization form and the complete photocopied set of box labels to Research Services.
11. Research Services will confirm receipt of your boxes by returning the *Memorandum of Transfer and Receipt of Research Records** with Part B completed.

Electronic Records

1. Label tapes, diskettes and other storage media clearly before storing in boxes.
2. Identify software requirements to access the information and include this information with the storage media.

*Available at <http://www.cdha.nshealth.ca/discovery-innovation/research-records-management>

So you want to retrieve some stored research records? Here's how.

The Iron Mountain storage facility where NSHA Research records are stored is located at:

1 Command Court
Bedford, NS
B4B 1H1

Off-site records




1. Speak with the AA and specify which box(es) you need. The box(es) will be requested for you and there will be a charge, based on service level (see point 2 below).
2. Service levels and costs (2012 costs used here as example):
 - a. Next day service: \$24.29
 - b. Half day service: \$56.08
 - c. Rush (2 hours): \$98.05
3. There is also a cost for returning a box to offsite storage (\$24.29).

Questions to ask:

Don't pack everything without asking these questions:

- If duplicate information is stored elsewhere, (e.g., by the sponsor or the REB), do I also need to keep copies?
- Can we use centrally stored master copies of documents (e.g., CVs) instead of creating and retaining duplicate copies?
- Are there related records held at the lab, pharmacy, radiology, etc., that are part of the study records?
- If the information is stored electronically, do I need to keep paper copies too?
- Consult Julia Enikeeva if you have questions about the need to keep a document.

Did you know that:

- Costs of storing records is significant. Transportation, retrieval and destruction fees are additional costs. 
- Leave out the binders because they:
 - take up a lot of space
 - often prevent lids from closing
 - are costly to dispose of
 - increase weight of boxes
 - can be recycled instead of being stored
- Leave out hanging folders because they will cause a box to disintegrate within a year.
- Offsite storage facilities are designed to fit only standard records storage boxes – odd size boxes cannot be accommodated.
- Electronic records may not be accessible if the software used to create them or the storage medium is no longer available. Migrating the records to newer versions of the software or storage media is a good solution.
- Electronic data storage media cannot be discarded or erased – it must be physically destroyed to protect confidential patient information.(e.g., a CD must be broken up into pieces) 

Copies of all records storage forms, instruction sheets and the records management booklet for research records are available at: <http://www.cdha.nshealth.ca/discovery-innovation/research-records-management>
Box label sleeves and plastic ties are available from Research Services.