HP TRIM Onsite Folder Disposal Procedures

HP TRIM version 7.2.1

Government Records Service
October 2015
## REVISION HISTORY

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FAQS – ONSITE DESTRUCTION
1. OVERVIEW: ONSITE DISPOSAL OF TRIM FOLDERS

This procedure covers managing onsite disposal of destruction for TRIM p-folders and e-folders. It reflects GRS recommended best practice.

Prerequisites: you are a TRIM Information Worker with experience creating and managing TRIM folders. You understand ARCS/ORCS classifications and retention schedules. You have attended TRIM folder management and disposition training.

1.1 This procedure covers

• TRIM p-folders eligible for immediate disposition of destruction that are located onsite at client location
• TRIM e-folders eligible for immediate disposition of destruction

1.2 Not covered

• TRIM folders scheduled for SR (selective retention) or FR (full retention). These TRIM processes are covered in a separate TRIM procedure
• TRIM p-folders held in offsite storage facilities under GRS accession numbers. These folders are “offsite” and destruction is managed at the storage facility site

2. GET DESTRUCTION NUMBER FROM GRS

Find online form ARS 653 on GRS' website: http://www.gov.bc.ca/citz/iao/records_mgmt/rcs/ars653.pdf

Request Application for Destruction of Records (requesting a Record Destruction Authorization [RDA] Number) and submit the e-form.

The destruction number (RDA number) identifies the group of folders processed for onsite destruction.
3. CREATE TRIM USER LABEL(S)

TRIM user labels are a useful way to keep a list of folders organized while processing them for onsite destruction.

**NOTE:** the name is misleading. They are not printed labels. They act as work trays that allow you to search and sort a group of folders once and then retrieve as needed.

**NOTE:** you can only see the user labels you create. Other Information Workers must create their own user labels if working on the same onsite destruction action. The same folders can be linked to different Information Workers’ user labels.

3.1 Create new user label

- **Shortcuts | Trays**
- Click on **User Labels** icon

- **Right click** anywhere in list pane
- **New | New Top Level**

- **New User Label** window appears
- **User Label Name:** enter a title that works for you (see example)
- **Add Icon** (optional)
- **OK**

- You have created a new user label
3.2 Repeat to create more user labels

NOTE: recommend putting p-folders and e-folders in separate user labels to keep them organized through onsite destruction process.

NOTE: See Appendix for instructions on managing linked e-/p-folders.

4. SEARCH FOR FOLDERS ELIGIBLE FOR IMMEDIATE DESTRUCTION

To be eligible for onsite destruction, folders must have a Closed Date, SO Date (if applicable), and status of Semi-active. The search described below only returns folders meeting these criteria.

NOTE: sort and send folders to user label before running another search.

4.1 Search | Find Records (Ctrl F) opens Search for Records window

4.2 Search tab

- Search By = Owner | Location = TRIM Owner name

NOTE: if you manage TRIM records for multiple branches ensure you are searching by correct owner.

NOTE: see Appendix for suggestions on narrowing searches.
4.3 Filter tab

- Uncheck all disposition checkboxes except **Semi-Active**

- In **Within another Saved Search** field add **Onsite DE approved** search

  **NOTE:** do not skip this saved search or search results will be incorrect.

  **NOTE:** to find saved search if you haven’t used it before, go to **Search | Saved Records Searches** and select **Onsite DE approved** search.

4.4 Record Types tab

- In **Select how you would like the Record Type filter to work**, select **Only show Record Types that appear in the list below** from drop down menu

- In **Enter a prefix of a value for a Record Type, then press Add**, enter appropriate e-folder OR p-folder record type | **Add**

- **OK** to run search

  **NOTE:** do separate searches for p-folders and e-folders to reduce confusion

  See Appendix for information on linked e-/p-folders.
5. SEND FOLDERS TO USER LABEL

5.1 Send folders to correct user label

- Tag all | Send to | Add To User Label

- Double click on user label

- Yes to All

- You have added the folders to the user label

- Repeat as needed until all folders are in appropriate user labels
5.2 Retrieve user label and display folders
To call up user label(s) after you created them

- Shortcuts | Trays | User Labels
- Right click in list pane | Show Records

6  **P-FOLDERS ONLY - CREATE A “PULL LIST”**
You will need to locate and remove your p-folders from shelves. The GOV BOXING ELIGIBILITY REPORT provides a “pull list” of your eligible p-folders.

6.1 Set up report
First, return to the User label you created for eligible p-folders. The user label holds the search results from Section 4 (above)

- Right click on User label | Show Records |
- (optional) sort the p-folders in the user label in whatever order will help you locate and pull them from shelves
- Tag All
- File | Print Report

- Select **GOV BOXING ELIGIBILITY REPORT**
- After selecting report, add an Optional Title if desired
- Select printer | Print a hardcopy report
6.2 How to use the report

The purpose of the report is to provide a hardcopy list of eligible p-folders for reference while pulling folders from shelves.

- Annotate the report with the DE box number each p-folder is placed into

**NOTE:** put physical folders into boxes before creating TRIM DE boxes to make it easier to match TRIM data to physical location of folders.

6.3 Missing p-folders

- Note missing p-folders on the report and update TRIM (see Appendix)
- Remove missing p-folders from the user label (see Appendix)

7 ADD DE (RDA) NUMBER TO FOLDERS

Adding the DE (RDA) number to each folder allows users to search for folders that were part of an onsite destruction action.

- Open user label | **Show Records | Tag All**
- **Right-click** anywhere in the list pane
- **Details | Additional Fields**
• Additional Fields – All Tagged Records window appears
• Select Destruction Number | Modify

![Additional Fields - All Tagged Records Window](image)

• Destruction Number – Edit Value window appears
• Enter destruction number received from GRS | OK

![Destruction Number - Edit Value (String) Window](image)

• OK again
• Yes To All
• The DE (RDA) number has now been added to the folders
• Add **Destruction Number** column to list pane to verify DE number was added to the folders

![Additional Fields - All Tagged Records](image)

<table>
<thead>
<tr>
<th>Record Number</th>
<th>Title (Free Text Part)</th>
<th>Destruction Number</th>
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<tbody>
<tr>
<td>ARCS-00102-20/213815A</td>
<td>Resident Genius weekly meeting 2012</td>
<td>DE15-123-MTIC</td>
</tr>
<tr>
<td>ARCS-00102-20/21425A</td>
<td>Kittens and puppies internet appreciation meeting</td>
<td>DE15-123-MTIC</td>
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<tr>
<td>ARCS-00102-20/214315A</td>
<td>Cat Herding working group ad hoc meetings</td>
<td>DE15-123-MTIC</td>
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<td>Annual all-staff happy fun times meeting</td>
<td>DE15-123-MTIC</td>
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<td>Inter-ministry Hot Air Conference April 1, 2012</td>
<td>DE15-123-MTIC</td>
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<td>ARCS-00220-20/357715A</td>
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<td>Ecina Everage Professional Institute of Deportment</td>
<td>DE15-123-MTIC</td>
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**8. CREATE ONSITE DESTRUCTION BOXES IN TRIM**

Each ministry has an onsite destruction box **record type**. Use this record type to create new TRIM destruction boxes.

**8.1 Create new TRIM destruction box**

• **File | New**

• Double-click on [your ministry acronym] **Box – On-site Destructions/Storage**
8.2 Enter box data

Add data in New Record [ministry acronym] Box window

- **Title (Free Text Part)** = branch or program name

  **NOTE:** do not identify the contents of the box. This is an information security standard as all TRIM users in your ministry can read any ministry box title.

- **Destruction Number** = RDA number you received from GRS

- **Owner** = the new box will display your default Owner. If you manage TRIM for multiple owners, ensure the correct one is entered in this field

- **Home, Assignee** = default is usually the same as Owner

  **NOTE:** see Appendix if Owner is set at Division and Assignee is set at Branch.

- **Disposition** = select Semi-Active

  - **OK**

  - **Enter Formatted Number** window appears

  - Enter new destruction number and box number (usually 0001)

  **NOTE:** TRIM may try to fill this field with an unrelated number that must be overwritten with the current destruction and box number.

  - **OK**
NOTE: TRIM “record number” may have different acronym than the RDA provided by GRS (e.g., “CS” vs “MTIC”). This reflects delay updating TRIM configuration data and does not affect onsite destruction processing.

8.3 Create additional destruction boxes

- Right-click on box 0001 | New | Copy Record

- Copy Record window appears
- Enter number of boxes you need in Number of copies
- OK
• **Enter Formatted Number** window appears
• Update destruction number and box number | **OK** for each new box

![Enter Formatted Number](image)

• The example below shows four new destruction boxes

![Records - Record Number is 'DE15-123-000' - Filtered - 4 Records Found](image)

9. **ENCLOSE TRIM FOLDERS IN DESTRUCTION BOX(ES)**

Do not enclose p-folders and e-folders in the same box unless they are linked e-/p-folders.

**NOTE:** see Appendix for enclosing linked p-/e-folders in DE boxes.

9.1 Enclose Folders

• User label | right click | **Show records**
• **Tag** the folders to be enclosed in box 0001
• Right-click | **Locations** | **Container (Folder/Box)**

![Locations Window](image)

• **Records Container (Folder/Box)** window appears
• **Set Container (Folder/Box) To =** destruction box number. This is the “Record Number” that appeared when you created the TRIM box
• If valid, the DE box number will **bold and underline**
• Ensure **Enclose the Record Now** checkbox is selected
• **OK**
• Yes To All

• The tagged folders are now enclosed in the TRIM DE box

9.2 Continue to enclose folders in boxes
• Tag the next group of TRIM folders and enclose them in the next box.

NOTE: a TRIM destruction box can “hold” @300 e-folders.

10. GOV DESTRUCTION LIST REPORT

10.1 How to use report
This report provides a fixed list of the folders destroyed onsite under a specific destruction number, including the boxes they were contained within. File it in ARCS-00432-35.

10.2 Search for DE boxes
• Search | Find Records
• Search tab:
- **Search By** = Record Number
- **Equal To** = Destruction number and asterisk (e.g., DE15-123*)

**NOTE:** asterisk (wild card) ensures all boxes with DE number are found.

- **Filter** tab
  - **Disposition** = Semi-Active

- **Record Types** tab
  - **(MIN) BOX - ONSITE DESTRUCTIONS/STORAGE**

- **OK** and a list of all DE boxes relating to DE number should appear
10.3 Run the GOV DESTRUCTION LIST Report

- Tag All | right click | Send to | Print Report

- Select GOV DESTRUCTION LIST report
- Add Optional Title if desired after selecting report
- Print

NOTE: see Appendix for printing and distributing copies of the report.

11. CLOSE TRIM DESTRUCTION BOXES

Closing DE boxes in TRIM ensures the contents cannot be altered.

- List DE boxes (see 10.2 above)
- Tag All of the DE boxes | right click anywhere in list pane
- Details | Dates
- **Record Dates** window appears
- Select the **Date Closed** window | TRIM updates the fields with current date and time | OK
- The time stamp does not affect destruction process for the box

**NOTE:** if changes to folders need to be made after closing the boxes, send a request and TRIM reference to EDRMS.Help@gov.bc.ca requesting box or boxes be re-opened.
12. SUBMIT ONSITE DESTRUCTION APPLICATION TO GRS

12.1 Make TRIM reference for DE boxes
- List DE boxes relating to the DE number (see 10.2)
- Tag All | right click in list pane
- Send To | Make Reference
- Select Create a single HP TRIM Reference File
- Title the reference with the DE Number | OK

12.2 Complete and return forms to GRS
Submit the following package electronically to RCSHELP@gov.bc.ca
- ARS518 form
- Tobacco Litigation Form D (if required by your ministry)
- GOV DESTRUCTION LIST report (electronic format, e.g., pdf)
- Approval email with authorized manager’s signature block
- TRIM reference for the DE boxes

12.3 Classify under ARCS-432-35
File a copy of the package, except for TRIM reference, under ARCS-432-35. This is your ministry’s documentation that records were destroyed appropriately.

12.4 Receive approval to proceed with onsite destruction
- P-folders:
  - On approval of your application, GRS sends you a notice of approval to destroy
  - You destroy or arrange for destruction of physical folders
  - You send email confirmation of destruction to your Records Officer. Include description of method used to destroy physical folders and the actual date they were destroyed.
  - File a copy of your confirmation email in ARCS-432-35.
  - GRS (Records Officer) processes disposition and changes TRIM status to “DE” for the boxes. DE status cascades to all folders within box(es)
- E-folder:
  - GRS reviews application
  - On approval GRS Records Officer updates TRIM box status to “DE”. DE status cascades to all e-folders within the DE box(es)

**NOTE:** once an e-folder has been processed for destruction (DE) the e-documents it held **cannot** be retrieved or recreated.
13 AFTER FOLDERS ARE PROCESSED FOR DESTRUCTION IN TRIM

Delete user labels

- Shortcuts | Trays | User Labels
- Right click user label | Delete

This does NOT delete the Folders

See the appendix below for additional instructions for unusual situations, FAQs, and links to related material.
APPENDIX 1: ONSITE DESTRUCTION TRIM FOLDERS

This appendix provides more detail about non-standard or infrequent issues.

1 TRIM folder status: semi-active vs active

- The TRIM searches described in this procedure only work for e-/p-folders that have a status of **semi-active**
- GRS updates folders from **active** to **semi-active** status for all TRIM users across government. This is a corporate service and is done about twice a year
- To be updated, your TRIM folders must be:
  - **Closed**. The “Closed Date” field must have a date entered
  - **SO Date**. The “SO Date” field must have a date entered if the folder has active base retention of **SO**
  - The scheduled active period has expired
- To benefit from this service, ensure your TRIM folders are closed on time. This includes rolling over your FY and CY files each year and reviewing your SO files regularly
- If you need to have folders updated from A to SA immediately in order to process onsite destruction, provide EDRMS.Help@gov.bc.ca with a TRIM reference for the folders and request status update

2 Obtain Record Destruction Authorization (RDA) number from GRS

GRS provides RDA numbers to TRIM users managing onsite destruction. Contact your Records Team at GRS for a link to the online form, if you do not have it bookmarked. GRS provides these numbers to ensure every DE number in TRIM is unique. A standard number format also supports efficient TRIM searches and reports.

3 Folders covered by draft schedules or have Hold applied

TRIM does not allow folders covered by draft (unapproved) schedules or folders that have a “Hold” applied to them to be processed for final disposition.

4 Narrow a search

In step 4.2 (Search tab) narrow the scope of the search to specific p-folders within a branch by adding criteria to the search tab query. The following examples show common search criteria:

A range of classifications (e.g. ARCS buildings and facilities records)
One classification (e.g. ARCS IT Project files)

Two classifications only (e.g., ARCS Training files)

One classification (e.g. all folders relating to a type of ORCS case file)

Records with the same retrieval code (e.g. all files relating to a particular project or entity which may have different classifications)
5 Missing p-folders

If you cannot locate a physical folder, update TRIM p-folder data to record the folder as missing.

- Right click on folder | Locations | Assignee
- Select Set as Missing button | OK
- Right click on folder (again) | Properties | Display and/or Modify Notes tab
- Add details about missing folder in Notes tab to provide background
- If p-folder is located later, update TRIM data and process onsite disposal

**NOTE:** if missing p-folder is a “part” of a multi-part case file, you may destroy the rest of the folders after identifying the missing part(s) in TRIM.
6 **Remove DE number from folder(s)**

If you remove a folder from the destruction action, you must update TRIM

- **Tag** folder(s)
- Right click anywhere in list pane | **Details** | **Additional Fields**
- **Additional Fields** window appears
- **Destruction Number** | **Modify**
- In **Destruction Number – Edit Value (String)** window, remove DE number from the field | **OK**
7 Remove folder(s) from User Label
   • Tag folder(s) | Right click anywhere in list pane
   • Remove from | Remove from User Label
   • OK | Yes to All

8 Remove folder from DE Box
   NOTE: if box has been closed, send a request to EDRMS.Help@gov.bc.ca requesting the box be re-opened.
   • Tag folder(s) to be removed from box
   • Right click in list pane | Locations | Container (Folder/Box)
   • Select Remove Permanently from Container (Folder/Box) bullet
   • Go to the yellow folder icon, and find your TRIM Owner location and select it
   • OK The folder has been removed from the box

   NOTE: once GRS has processed “destruction,” e-folders cannot be “removed” from their DE box.
9 Manage “linked” p-/e-folders

If you have linked folders, where the TRIM p-folder is alternatively contained “within” an e-folder, you can choose to enclose the e-folder in the same destruction box as the p-folder. This way, both folders will be documented as “destroyed onsite” in the same DE box.

- Include both E-FOLDER and P-FOLDER record types in searches
- Add the “Alternative Container” column in the list pane, so the p-folders will be listed within their linked e-folders
- When enclosing the linked folders in a DE box, tag both folders (e- and p-), and enclose them in the same DE box
- When GRS Information Manager reviews box contents, it will be clear the DE box(es) hold linked folders, and both formats will be processed for destruction after you confirm the physical folders were destroyed
- The Ministry must confirm physical destruction of the p-folders before GRS will process destruction in TRIM for both formats

10 Recommendations for printing reports

- **GOV BOXING ELIGIBILITY LIST report**

  Run this report for p-folders only. The purpose of this report is to provide you with a hardcopy list of p-folders that you can refer to as you pull p-folders from their shelves for disposal. As you pull each p-folder, note on the Report which “Destruction Box” you are placing it in. (see FAQs for more information about the purpose of Destruction Boxes).

  When you are finished using the report, you can discard it as transitory
• **GOVERNMENT DESTRUCTION LIST report**
  
  This report documents all the folders processed for onsite destruction (both e-folders and p-folders) and the TRIM DE boxes they are enclosed in. The report provides a permanent record of the destruction action.

• You need 2 copies of this report:
  
  o 1 pdf to submit to GRS with the rest of your destruction application paperwork;
  
  o 1 copy for your ARCS-432-35 file.

11 Your folder record types and owner are set for division

The standard configuration in TRIM is branches have unique e/p folder record types and owner locations. However, in some ministries, all branches within a division will share the folder record types and owner location. Then the folders that belong to an individual branch will be identified by unique **Assignee Location**.

11.1 Search for folders eligible for destruction (Section 3 of manual)

After you have done step 3.2 (entered “Owner” in Location field):

• New

• **Search By** = Assignee | **Location** = [the assignee branch name]

  This will restrict the search results for the folders where assignee is your branch.

12 Closed folders and time stamps

When you close a p-folder that has an active base retention of FY and the close date is March 31, you must delete the **time stamp** (see screen shot, below). The reason for this requirement is that TRIM adds an additional fiscal year to the active retention period if the time stamp field has data in it.
13. Managing folders with parts

If you are managing onsite destruction of a TRIM folder that has multiple “parts”, remember that TRIM manages all the parts as a single file. This means that all parts are scheduled together, according to the closed date of the last part.

The last part of a file must be closed and eligible for immediate destruction before any of the parts can be transferred.

Different parts of a folder can be located in different physical places (e.g., in different boxes). Remember that all the parts of a file will reach their eligible final disposition date at the same time, based on the closed date of the last part for FY/CY files, and the SO date for SO files.

All parts of an SO file must have the same SO date.

If a part of a file is missing, you may continue with destruction of the other parts, just ensure you note it as “missing” in TRIM.

**NOTE:** if you have questions whether or not to create “parts,” contact your Records Team.
APPENDIX: FAQs about TRIM and Onsite Destruction

A. Can e-folders be retrieved after GRS changed their TRIM status to DE?

No. GRS receives your request to process onsite destruction of your e-folders through the RDA process. After GRS staff perform this task in TRIM (that is, change the status of the e-folders to DE), the e-folders and the e-documents within them cannot be retrieved. They are permanently deleted.

However, folder and document metadata is retained in TRIM. Users can view folder and document titles, creation dates, close dates, destruction dates and related data. The metadata provides documentation about the e-folders and e-documents destroyed in TRIM.

Because e-folder destruction is final, it is important to carefully review them before requesting GRS to process final disposition. The Information Worker must possess a good understanding of the program records, and the branch Director is the most appropriate person to authorize onsite destruction.

B. Can p-folders be recreated after they have been processed for DE?

If the TRIM data was updated, but the physical folders were not destroyed, the TRIM data can be reset. However, GRS will not update TRIM to process destruction on p-folders until you send a confirmation email that the physical folders were destroyed, so this situation should not happen.

C. Why are p- and e-folders put in boxes for onsite destruction?

Enclosing folders in a DE box helps to ensure the original group of folders processed and authorized for destruction remains intact through the process. Once the folders are in the box, and the box is “closed” in TRIM, folders cannot be added or removed. This supports the integrity of the process.

D. Onsite vs offsite

“Onsite” destruction means you manage the destruction of the folders. For physical folders, it means you either destroy them or arrange to have them destroyed (for example, a shredding company that may shred folders at your office or take them to their secure shredding site). After the physical folders are destroyed and you confirm this with GRS, TRIM is updated to reflect that destruction occurred.

All e-folders are “onsite” destruction, because they reside in the TRIM application for their entire lifecycle. NOTE: the only exception is e-folders linked to p-folders that are transferred offsite under accession numbers.

“Offsite” folders are those that were transferred to storage facilities under accession numbers. When these p-folders become eligible for destruction, the storage facility manages the process and GRS updates TRIM. This update is done quarterly.