# TIP Sheet

## LONGTERM STORAGE OF RESEARCH RECORDS

**Tip #1:** Check if you have an account for long-term storage (e.g. Iron Mountain).
- Check with your administrative staff

**Tip #2:** Get empty storage boxes from your document storage company and blank transmittal forms
- Estimate number of boxes you will need
- You will need one transmittal form per box
  - Transmittal forms are non-carbon receipt form (similar to Fedex airbills)

**Tip #3:** Create a Tracking Sheet (Excel, Access, OnCore)
- One Master Tracking Sheet for all studies and all boxes, or
- Tracking sheet for individual studies

**Tip #4:** Enter into tracking sheet:

<table>
<thead>
<tr>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sponsor name &amp; Protocol# (or name of study)</td>
</tr>
<tr>
<td>Storage Box #</td>
</tr>
<tr>
<td>Major descriptions of box Content</td>
</tr>
<tr>
<td>Preparation Date</td>
</tr>
<tr>
<td>Sent to storage date</td>
</tr>
<tr>
<td>Destruction eligibility date</td>
</tr>
<tr>
<td>Name of Sender</td>
</tr>
</tbody>
</table>

**Tip #5:** Label each box with barcode
- Complete the transmittal form
- Peel off the bar code and stick it on the box
- Place one sheet of the transmittal form inside the box
- File the second sheet of the transmittal form with your records

**Tip #6:** Contact document storage company for pickup
- Check with your administrative staff

**Tip #7:** Also keep in mind:
- Be sure your record keeping will allow you to retrieve all boxes for a given study, or individual boxes if needed (e.g. for an external (e.g. FDA, OHRP) audit)
- Long-term storage has a cost associated with it. Make sure you have a storage fee in your study contract and remember to invoice for it before you close the study and the financials for the study.
- Sending and retrieving boxes also comes at a cost. Try to have all records and boxes complete and tracked before sending them to storage to minimize cost.
For more information, call the Clinical Research Support Center at 720-724-1111. Email: clinicalresearchsupportcenter@ucdenver.edu