

REQUESTING RECORDS FROM METRO RECORDS MANAGEMENT

Records stored with Metro Records Management will be made available only to the department that transferred the records. All other parties requesting records will be referred back to the department's Records Officer.

Departments should notify Metro Records Management as to which departmental staff will be making requests. It is helpful to limit this number to less than four employees.

Every effort will be made to retrieve records as soon as possible, generally 24 hours notice is needed. To assist us in this effort, it is essential that the requestor provide the barcode number (and, if possible, the location) for each item requested.

Requested information may be faxed, delivered through Metro Mail, or picked up by departmental staff. Metro Records Management staff can make deliveries as scheduling permits for departments that do not have access to Metro vehicles.

Developing Your Request

1. Clarify what records are being requested. This may include understanding the type of document, dates in question, unique identifying numbers related to the file, and/or parties related to the file.
2. You can find the barcode number for the appropriate box by using your records transmittal paperwork or your cumulative holdings list to identify the relevant record series and the sequence and/or dates corresponding to the request.
3. If possible, find the location for the box by using your cumulative departmental holdings list.

Submitting Your Request

You have two options for submitting a request for records to Metro Records Management:

- Intranet form
- Print and fax a hard copy request form

Instructions for each option follow.

Intranet Requests

Locating the Request Form

1. On the Inside Metro site, choose the link “Records Request Form” listed under Forms (the direct link is <http://im/shared/recordsMgmt/>.)

Note: If you have never been to Metro’s intranet site, open your Internet Explorer browser and enter only <http://im> in the address bar.

2. The “Inside Metro” intranet page should appear.

3. Under the FORMS list, click Records Request Form. The following form will open.

*Note: All fields marked with a red * must be completed before submitting the information entered on the form.*

The screenshot shows a Microsoft Internet Explorer browser window displaying the Metro Records Management website. The address bar shows the URL <http://im/shared/recordsMgmt/>. The browser's search bar is set to Google. The main content area displays the "METRO RECORDS MANAGEMENT RECORDS REQUEST FORM" with a "Customer Information" section. This section includes fields for Department, First Name, Last Name, Phone (with area code 615), and Fax (with area code 615). A "Special Instructions" field is also present. Below this is the "Record Information" section, which includes fields for Container Barcode, Location Number, Description of Item, Delivery Method (set to Fax), and Will Item be Returned? (set to No). There are "Add Container" and "Clear" buttons at the bottom of the form.

Completing the Request Form

1. In the Customer Information section, complete at least your department name, your first and last name, and your telephone number. (The fax number will be necessary if you choose to have the results of your request faxed.)
2. In the Records Information section, complete all fields with the red *.
3. Enter the complete six-digit barcode number under “Barcode.”
4. If possible, enter in the complete location number under “Location.”
5. Under Item Description, enter all relevant details so that we are able to identify exactly what you are requesting. For example, if you are looking for:
 - a case file, then include both the case number *and* the style of the case (C3714-Jones vs. Smith)
 - an employee file, then include the name *and* social security number.
6. There are several choices for Delivery Method—click the down-arrow next to that field to see and select your choice.

Please consider the following in making your delivery choice:

- Metro Records Management receives one daily pickup by Metro Mail about 9:00 a.m.
 - Full boxes and certain large files are not suitable for transfer through Metro Mail.
 - Files or boxes that are being picked up have highest priority for retrieval.
7. Select Yes or No in the final field, depending on whether or not the file or box will be returned to Metro Records Management for continued storage.
 8. When you have finished entering the information for your first (or only) item to request, click the Add Container button at the bottom of the form (you may need to scroll down to see this button).
 9. The result of clicking the Add Container button will look much like the following. Note that additional lines have been added to the bottom of the form, summarizing the request(s).

METRO RECORDS MANAGEMENT
RECORDS REQUEST FORM

Customer Information

Fields marked with an * are mandatory.

Department: *

First Name: *

Last Name: *

Phone: (615) * Ext.

Fax: (615)

Special Instructions:

Record Information

Container Barcode * ?

Location Number ?

Description of Item * ?

Delivery Method * ?

Will Item be Returned? * ?

Total Containers Requested

		Container Barcode	Location Number	Description of Item	Delivery Method	Will Item be Returned?
Edit	Delete	012345		Contract between Metro and vendor ABCXYZ, filed in the Clerk's Office on May 1, 2002	Fax	No
Edit	Delete	123456		Contract between Metro and vendor PPXYD, filed in Clerk's Office December 21, 2001	Fax	No

10. If you need to make changes to any of the request information click Edit next to that item. You may make the necessary changes and add the container again.

11. If you want to delete any of the request information, click Delete next to that item and the item will be removed from your request.

12. If a copy is needed, print one before submitting the request to Metro Records Management. To print a copy, go to the menu on the upper left of your window and choose File > Print, and then click the print button.

Submitting the Request Form

1. When you are sure your request is complete, click the Submit Request to Metro Records Center button.
2. Metro Records Management will receive your request via an email that looks like the following.

Metro Records Center - Message (HTML)

File Edit View Insert Format Tools Actions Help

Reply Reply to All Forward [Print] [Copy] [Paste] [Close] [Zoom] [Help]

From: RecordsCenter@metro
 To: Records Center (Metro Clerk)
 Cc:
 Subject: Metro Records Center

Customer Information

Department: Metro Clerk's Office
Name: Marilyn Swing
Phone: 862-6770
Phone Ext.:
Fax: 862-6774
Special Instructions:

Record Information

Container Barcode	Location Number	Description of Item	Delivery Method	Will Item be Returned?
012345		Contract between Metro and vendor ABCXYZ, filed in the Clerk's Office on May 1, 2002	Fax	No
123456		Contract between Metro and vendor PPXYD, filed in Clerk's Office December 21, 2001	Fax	No

3. When Metro Records Management receives this email, your request is placed in the queue to be processed.

Making a Shortcut to the Request Form

For frequent use, you may want to make a shortcut icon and place it on your desktop.

1. Open the Records Request Form.
2. Go to the menu on the upper left of your screen and choose File > Send > Shortcut to Desktop.



3. Look on your PC's desktop screen for this icon:

Fax Requests

1. On the Metro Records Management web site choose the link “Requests for Records” (the direct link is http://www.nashville.gov/records_management/forms/request_for_records_fax.pdf)
2. Print out the Request for Records form.
3. Fill in the header with your name and department/division name. Be sure to include your phone and fax number.
4. Write in the complete barcode number under “Barcode.” This information is required.
5. If possible, write in the complete location number under “Location.”
6. Enter all relevant details so that we are able to identify exactly what you are requesting. For example, if you are looking for:
 - a case file, include both the case number *and* the style of the case (C3714-Jones vs. Smith)
 - an employee file, include the name *and* social security number.
7. If you want the information faxed, check to the right of “Fax.”
8. If you want the file sent by Metro Mail, check to the right of “Metro Mail.”
 - Metro Records Management receives one daily pickup by Metro Mail about 9:00 a.m.
 - Full boxes and certain large files are not suitable for transfer through Metro Mail.
9. If you want to pick up a file or box, check to the right of “Pick Up.”
 - Files or boxes that are being picked up have highest priority for retrieval.
10. If you know the file or box will be returned to Metro Records Management, check to the right of “Will Be Returned.”
11. If you know the file or box will not be returned, check the area to the right of “Will Not Be Returned.”

12. When you have completed the form(s) reflecting all records you wish to request, fax form(s) to Metro Records Management at 862-5886.