RECORDS RETENTION

Step by Step
Step #1

Separate your records by Title and Year
i.e. Monthly Budget Reports (SOA), FY 2009
Step # 2
Search for the Record Title, Agency Item # and Retention Period within the Records Retention Schedule.

Click here: [State of Texas Records Retention Schedule]
Step #3

Now you will need to Box and Label your records
Step #4

Order your boxes from General Stores, create a requisition using commodity code 615-37-09030-2

Click Here: General Stores
Step #5

Create a Label (typed) for your box, be sure to include a box number and destruction year.

<table>
<thead>
<tr>
<th>AGENCY ITEM #</th>
<th>RECORD TITLE AND YEAR OF MATERIAL</th>
<th>DESTRUCTION DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>4.5.102</td>
<td>Monthly budget Reports FY 08</td>
<td>2011</td>
</tr>
<tr>
<td>4.1.102</td>
<td>VP2 Check Request FY 08</td>
<td>2011</td>
</tr>
<tr>
<td>4.1.102</td>
<td>Billing VT5 IDT's FY 08</td>
<td>2011</td>
</tr>
<tr>
<td>1.1.164</td>
<td>Benchmarks FY 08</td>
<td>2011</td>
</tr>
<tr>
<td>1.2.105</td>
<td>Vendor Invoices FY 08</td>
<td>2011</td>
</tr>
<tr>
<td>5.3.108</td>
<td>Purchase Orders FY 08</td>
<td>2011</td>
</tr>
<tr>
<td>4.3.102</td>
<td>Shipping Invoices FY 08</td>
<td>2011</td>
</tr>
</tbody>
</table>

Click Here:  Retention Box Labels
Step #6

Complete a Request for Storage form (typed), the box number will be the same as on the label.

Click Here: Records Request for Storage
Step #7

Send the Request for Records Storage form to DT Mail Service via campus mail, you can also send it as a PDF file to edward.garza@utsa.edu for approval.
Step # 8

If approved, you can then make arrangements to send your boxes to our DT Records Storage Facility.