

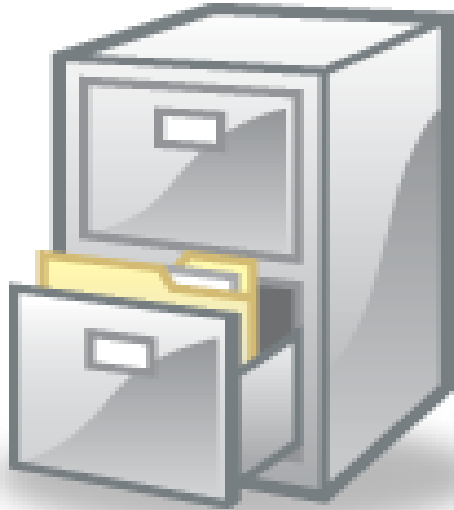
RECORDS RETENTION

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.

UTSA STATE OF TEXAS RECORDS RETENTION SCHEDULE SLR 105
Form SLR 105C must accompany this form.

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2. Agency Code: 743	3. Agency Name: University of Texas at San Antonio						10. 106 No.	11. TSLAC Only Amend No.
4. Records Series	5. Agency Item #	6. Records Series Title	7. Retention Period		8. Arch	9. Remarks		
ADMINISTRATION RECORDS			Agency	Storage	Total			
Section 1.1 - General								
1.1.002	1.1.102	Audits - Audits and reviews performed by or on behalf of an agency, including the working papers that support the audit. Also includes audits performed on the agency.	AC-14		AC-14	AC=Publication or release of final audit findings. The record copy of any audit performed by the State Auditor's Office is retained permanently.		
1.1.004	1.1.104	Biennial Budget Requests - Including any supporting documentation created and/or used to justify and support legislative appropriations requests by an agency.	AC-6		AC-6	AC= passage of Appropriations Act. ARCHIVES NOTE: The archival requirement is met by sending the required copies of the request to the Texas State Publications Depository Program, Texas State Library and Archives Com		
1.1.106	1.1.106	Complaint File (from employees and others concerning the System component and records pertaining to the resolution of the complaint)	AC-2		AC-2	AC=Final disposition of the complaint		
1.1.107	1.1.107	Correspondence - Administrative - Incoming/outgoing and internal correspondence pertaining to the formulation, planning, implementation, interpretation, modification, or redefinition of the programs, services, or project of a component and the administrate	3		3	ARCHIVES NOTE: Only the administrative correspondence of executive staff, board or commission members, division directors and program heads require archival review. Contact the State Archives when these records have met their retention periods.		
1.1.108	1.1.108	Correspondence - General (Non-administrative) incoming/outgoing and internal correspondence, in any media, pertaining to or arising from the routine operations of the policies, programs, services, or projects of a component. (includes interoffice corresp	1		1	SEE comment to item number 1.1.007. SEE ALSO item number 1.1.010.		
1.1.110	1.1.110	Directives (routine issuances on general office procedures)	US+1		US+1			
1.1.111	1.1.111	Executive Orders - Any document that initiates, rescinds, or amends a regulation, policy, or procedure that governs the programs, services, or projects of a component.	US+3		US+3			

Click here: <http://www.utsa.edu/openrecords/docs/SLR105UTSA.pdf>

Step #4

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

Click Here: http://www.utsa.edu/pds/crw/gen_store.cfm



Step #5

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

Box #

Destruction Year

Box # 090209

DEPARTMENT NAME: Purchasing / DT Mail Services		EXT. 2781
BUILDING	Durango	ROOM NO. 0.106
AGENCY ITEM #	RECORD TITLE AND YEAR OF MATERIAL	DESTRUCTION DATE
4.5.102	Monthly budget Reports FY 08	2011
4.1.102	VP2 Check Request FY 08	2011
4.1.102	Billing VT5 IDT's FY 08	2011
1.1.164	Benchmarks FY 08	2011
1.2.105	Vendor Invoices FY 08	2011
5.3.108	Purchase Orders FY 08	2011
4.3.102	Shipping Invoices FY 08	2011

Click Here: <http://www.utsa.edu/pds/records/forms/Retention%20Label.xls>

Step #6

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

The University of Texas at San Antonio
REQUEST FOR RECORDS STORAGE
UTSA Records Retention Center
(All forms must be typed)

Date -

To: Records Retention Center
C/o Frank Salinas or John Salas
Downtown - Mailroom
Phone: 458-2781 or 2780

All materials to be stored at the UTSA Records Retention Center must comply with the following conditions (NO EXCEPTIONS):

1. All materials will be packed in boxes, sealed and clearly labeled with contents, department's name, record series # and destruction date if applicable. The label can be printed from the Records Retention web-site.
2. The box # will be the month, year of the request and box number. Example: 040801
3. The box to be used for the storage of records will have the dimensions of 12" W x 10" H x 15 1/2" L, the commodity code is 615-09030-2 which may be purchased from General Stores. **Boxes larger than the specified size will be returned to the department NO EXCEPTIONS.**
4. The transportation of 5 or more boxes will need to be coordinated with Physical Plant, contact Work Control at 458-4262 to initiate a work order.
5. All requests must have prior approval from the Warehouse Manager before any records will be accepted.

From: Department - Section / Area -

Records Retention Representative: Name - Phone - Fax -

Length of time material is to be stored - Years.
Are materials to be returned to the department or destroyed? **DESTRUCTION YEAR:**

Please use one form and one box per destruction year (if applicable).

Box #	Record Title	Contents
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Click Here: http://www.utsa.edu/pds/records/forms/Request_for_Storage.doc

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 frank.salinas@utsa.edu for approval.



Step # 8

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

