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.

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

To: Records Retention Center
C/o Edward T. Garza 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: 04001
3. The box to be used for the storage of records will have the dimensions of 12”W x 10”H x 15¼” L, the commodity code is 615-37-09030-2 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.

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

DESTRUCTION YEAR: [ ]

<table>
<thead>
<tr>
<th>Box #</th>
<th>Record Title</th>
<th>Contents</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>2</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
<tr>
<td>3</td>
<td>[ ]</td>
<td>[ ]</td>
</tr>
</tbody>
</table>

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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.