

## Records Circulation Request – Instructions

Step 1: Complete the form by entering the following information:

Field 1: Department name as shown on the Retention Schedule.

Field 2: RMAN (Records Management Assigned Number) - If you don't know this number, it is the first 4 digits of the Storage Approval number.

Field 3: Name of the person requesting the records.

Field 4: Requestors phone number.

Field 5: The location of the boxes to be delivered to or picked up, Building and room number.

Field 6: The "L" code. Each UTMB room has been assigned a location number, which is usually a bar code label affixed mid way up on the doors hinged side.

Field 7: Check if the request is from storage, or to storage.

Field 8: Limited Access, check yes or no.

NOTE: Limited Access means only department employees listed on the Storage Approval form may request and sign for the return of a stored record.

Field 9: If yes, provide employee(s) names that are authorized to sign for delivery of the records.

Field 10: If this is a Request from storage, in your Records Retention Manual, go to the "purple" tab "Transmittals." Find the box code number for the box(es) you want returned. Enter that number in Field 10 for each box returning.

Field 11: For Records Management use.

Field 12: For Records Management use.

Field 13: For Records Management use.

Field 14: For Records Management use.

Step 2: Mail the completed form to Records Management - 0918, or fax it to 747-5910.

NOTE: A box to be returned to storage after use by department staff will be checked out to the requester for 30 days. If the record needs to be kept at the department longer than 30 days, the department contact person should call the Records Center to extend the time period or to request a permanent transfer back to the department.