

Storage Approval – Instructions

Step 1: Complete one Storage Approval form for each records series to be stored with the Records Center. Storage Approval forms are filed behind the “blue” tab in your Records Retention Manual.

Step 2: Go to the “yellow” tab in your department’s Records Retention Manual.

Step 3: Locate the Records Series title that you want to store and complete the form as follows:

Field 1: Leave this field blank, see step 5 below.

Field 2: Department name as listed on the Records Retention Schedule.

Field 3: Records Coordinator name.

Field 4: Records Coordinator phone.

Field 5: Fax number.

Field 6: The location of the boxes to be picked up, Building and room number.

Field 7: 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 8: Records Series Title, found in Field 6 of the Records Retention Schedule.

Field 9: Agency Item Number, found in Field 5 of the Records Retention Schedule.

Field 10: The Records Retention Schedule approval date, found at the top of the Records Retention Schedule.

Field 11: Retention Period Agency, found in Field 7 of the Records Retention Schedule.

Field 12: Retention Period Storage, found in Field 7 of the Records Retention Schedule.

Field 13: Retention Period Total, found in Field 7 of the Records Retention Schedule.

Field 14: Activity, reference rate for the records series. Estimate how many times the box will be referenced after transferring to storage. Note: Only inactive records may be sent to storage.

Field 15: Access authorization, check the appropriate box. If Limited Access is checked, please provide the name(s) and employee number(s).

Field 16: Signature and date of the Department Records Coordinator.

Step 4: Make a copy of the form, place it behind the “blue” tab “Storage Approvals” in your Records Retention Manual.

Step 5: Mail the original completed form to Records Management route 0918.

NOTE: Records Management will review the form and if approved, assign the Storage Approval Number. This number will be communicated back to you for future reference, write the number in Field 1 of your Storage Approval copy. NOTE: It is only necessary to complete one Storage Approval form per records series title. Storage Approval numbers are required on Transmittal forms for future shipments of the same records series.

Step 6: After receipt of the Storage Approval Number, use the Transmittal of Records” form to send the records to storage.