

Transmittal Of Records - Instructions

Step 1: In your Records Retention Manual, go to the “blue” tab “Storage Approval” and locate the approval form for the records series you want to send to storage.

Field 8: Write the Storage Approval Number.

Step 2: In your Records Retention Manual, turn to the “yellow” tab “Current RRS”.

Field 9: Write the Records Retention Schedule date found at the top of the schedule.

Step 3: Complete the remainder of the form as follows:

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

Field 2: Contact person.

Field 3: Phone number of the contact person.

Field 4: Mail route of the contact person.

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 midway up on the doors hinged side.

Field 10: Records Series Title, found in field 6 of the Records Retention Schedule.

Field 11: Agency Item Number

Field 12: Total retention period.

Field 13: Record medium codes: P = paper; M = microfilm; E = electronic; O = other.

Field 14: Number of boxes transferred on this Transmittal. Letter/Legal boxes may be ordered from Materials Management - item number 60471.

Field 15: Leave this field blank, the Records Center will assign this number.

Field 16: Beginning with the number one (1), list consecutively each box being transferred. Write the temporary number on each box, use the Transmittal - Continuation page as needed.

Field 17: Enter the name of the first item in the box.

Field 18: Enter the name of the last item in the box.

Field 19: Inclusive dates, oldest record in the box to most recent.

Field 20: The date the records series is scheduled for disposition. Use the Retention Code / disposition Worksheet to calculate this date. Call Records Management at 747-5900 if you need help with calculating this date.

Step 4: Make a copy of the completed Transmittal form, place it behind the “purple” tab “Transmittals” in the Records Retention Manual.

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

NOTE: A Records Specialist will process the form upon receipt and complete an on-site inspection of each box listed on the Transmittal form. Records Center box code labels will be applied to each box. A complete list of all box code labels will be left with the Department Records Coordinator. This list must be filed in the Records Retention Manual behind the “purple” tab. Departments MUST have the box code number in order to retrieve the records from storage. The Records Specialist will schedule pickup with our Delivery Services.