

<b>UT Health Science Center: FI0120-H Records Management</b>	
<b>Version 1</b>	<b>Publication Date: 05/26/2022</b>

<b>No./Title:</b> F120 – Records Management	<b>Resp. Office:</b> FINANCE	<b>Effective Date:</b> 07/01/2016
<b>Category:</b> Accounting	<b>Last Review:</b> 10/01/2019	<b>Next Review:</b> 10/01/2021
<b>Contact:</b> Marion Grinston	<b>☎</b> 901.448.8471	<b>✉</b> mgrinsto@uthsc.edu
<b>Related</b>		
<b>Policies:</b> <a href="#">FI0120 - Records Management</a>		
<b>Forms:</b> <a href="#">FI121 Records Management Forms</a>		

## PURPOSE

This procedure outlines the campus process for the storage, retention, and disposal of University records.

## BACKGROUND

University **Fiscal Policy FI0120 - Records Management** provides guidance for identifying, maintaining, preserving and destroying university records while complying with all applicable laws and regulations. The policy also provides minimum retention periods and the office responsible for maintaining the records. The Records Management Center (RMC) houses inactive records. Active records are not accepted for storage.

## DEPARTMENTAL RECORDS REQUESTS

- It is the responsibility of the department to order Records Management storage boxes from UT General Stores (448-6152). The order number is 5555750. The description is “Box Corrugated Storage”. Any other boxes are unacceptable.
- The department must complete a separate inventory form for each box. Each form and box must be numbered to match. In addition, a copy of this form must be placed inside each box.
- Do not break up numbering of the boxes by study, by account, or any other way. All boxes must be number sequentially.
- The retention date is calculated by using the end date on section #11 on the Records Inventory and Retention Form ([link here](#)) and not by the current year. Add the retention year to the end date to get your destroy date
  - **Example:** If the dates of your file are 1/1/2000 – 2/1/2010 and your retention time is 10 years, the destroy date is 2/1/2020

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- The department should send the original form to Marion Grinston. She will contact the Facilities logistics office to arrange for the boxes to be picked up from your department and transported to the storage facility. The department should not contact the logistics office directly.
- Once this process is completed, the department will be provided with an inventory report which shows the records stored and their location.
- If a department needs information from a record which is already in storage, they must fill out the records retrieval form by using the data on the inventory report. The department should provide the completed form to Marion Grinston who will arrange for the retrieval of the records in storage.
- The department will be contacted once the retention period has expired to determine if the records can be destroyed.

SEE F121 – RECORDS MANAGEMENT FORMS FOR ALL THE NECESSARY INSTRUCTIONS AND FORMS RELATED TO THIS PROCEDURE.

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