Records Management Manual

PROCEDURES FOR STORAGE, DESTRUCTION AND THE RETRIEVAL OF DOCUMENTS

The purpose for these procedures is to know where The University of Texas Rio Grande Valley (UTRGV) documents are stored, how to store, retrieve, destroy or scan, if needed.

Records become the responsibility of the Records Management Officer (RMO) and the Records Management department once stored. Current documents are located at the Armory Building, Brownsville Campus and at the Community Engagement Student Success Building, Edinburg Campus.

Documents are stored only if a proper *Work Order* accompanied with an *Inventory Worksheet* *per box* have been prepared and emailed to the Records Management office department email address (recordsmanagement@utrgv.edu or the Records Management Department at Brownsville campus or the Edinburg Campus.

Each box of records (documents) must be identified on the front or back. Place department name and box # on the lower right side of box matching the paperwork.

TO STORE DOCUMENTS:

1. To have Records Management pick up any documentation, a work order should be emailed to luis.hernandez@utrgv.edu or rodrigo.candaudap01@utrgv.edu for the Brownsville campus preferably 24 hours in advance. Also to andrew.gandy01@utrgv.edu or francisco.ramirez@utrgv.edu or jesus.gonzalez@utrgv.edu for the Edinburg campus or the main email address recordsmanagement@utrgv.edu .

2. Records Management will notify the requested office when pick up will be made.

3. The requested office should write down the information on the Records Inventory Worksheet with details pertaining to box of documents, records series titles can be found in the Records Retention Schedule.

TO REQUEST THE DISPOSAL OF DOCUMENTS FROM OFFICE: BOX(S) or BIN(S)

1. A work order and the Departmental Destruction form should be emailed to Records Management at luis.hernandez@utrgv.edu or rodrigo.candaudap01@utrgv.edu for the Brownsville campus preferably 24 hours in advance. Also to andrew.gandy01@utrgv.edu or francisco.ramirez@utrgv.edu or jesus.gonzalez@utrgv.edu for the Edinburg campus or the main email address recordsmanagement@utrgv.edu .

2. Records Coordinators or designated alternates from the department should be the only people authorized to submit the paperwork to Records Management Department. If not, box(s) or bin(s) will not be picked up from location.

3. A Departmental Destruction form should specify what the box(s)/bin(s) contain(s) and need to be destroyed as per the Records Coordinator following the Records Retention Schedule.

4. If Bin(s) is/are not already on a Rotation Schedule, Records Management should pick up the bin(s) within a period of 24 hours after paperwork has been submitted.

5. Box or boxes should be picked up within a period of 24 hours after paperwork has been submitted and if the department needs box(s) to place disposition records, just contact Records Management to get box(s).

6. Departmental Destruction forms should specify what the bin(s)/box(s) contain(s) and need to be destroyed per the department Records Coordinator.

TO RETRIEVE DOCUMENTS FROM STORAGE:

1. A work order should be emailed to Records Management at luis.hernandez@utrgv.edu or rodrigo.candaudap01@utrgv.edu Brownsville campus preferably 24 hours in advance. Also to andrew.gandy01@utrgv.edu or francisco.ramirez@utrgv.edu or jesus.gonzalez@utrgv.edu or main email recordsmanagement@utrgv.edu

2. Provide your name, telephone number, department, and specific office location where document(s) should be delivered.

3. Identify document(s) being requested by department, title, inventory date, and box number or Inventory Worksheet submitted at time of storage of records.

4. Records Management will notify the requesting office of the date when delivery will be made.

5. Upon delivery, Records Management will require the requesting office to sign off on the work order on having received the described document(s). A notice will be put in a "tickler" file noting that items have been delivered and to whom and when. Delivered items/files should flash must be picked up within ten days of delivery. Document(s) not returned within ten days will be indicated by a tickler file and recipient will be contacted.

6. When the box of documents is ready to be picked up, the same procedure as for delivery will apply.

7. Any document(s) removed and not returned should be mentioned by email and on the pick-up form so that the Records Management department can be aware that the requesting office has the document(s) and it is no longer in Records Management storage.

8. Should the office intend to keep any documents permanently for any reason, the requested office must notify the Records Management department in writing. This should be sent to the attention of the Records Management Officer (RMO) or her/his designer.

9. Should document(s) be moved to another location outside the requested department's office, the Records Management department should be notified in writing of the document(s) new location.