

## **TRANSFERRING INACTIVE RECORDS TO RECORDS RETENTION FOR STORAGE - PROCEDURE**

1. Documents to be stored must be in banker's boxes, with no more than two types of records per box.
  - We can accept paper documents only, no plastic binders or metal objects.
  - Boxes that contain plastic, metal or other objects that can damage shredding machines will not be accepted or stored.
2. Records will not be retained past the scheduled destruction date. All University of Houston System campuses follow the certified and approved by the State of Texas Records "University of Houston System Records Retention Schedule" located on the Records Retention at <http://www.uh.edu/finance/Forms/Records%20Retention%20Storage%20Transfer%20Form.pdf>
  - Records Retention will identify the destruction year based on the Record Category and Series Title defined in the Storage Transfer Form.
  - If multiple document types are submitted, the latest year will be used.
3. Each box being transferred for storage must use a Records Retention Storage Transfer Form. See Records Retention page ([http://www.uh.edu/finance/pages/Rec\\_Retention.htm](http://www.uh.edu/finance/pages/Rec_Retention.htm)), link "Records Retention Storage Transfer Form".
4. Each transfer form should complete the following information on the Storage Transfer Form for each box:
  - **DEPARTMENT INFORMATION** - (PS Department ID, Department Name, Department Contact, Contact Phone Number, and Contact Email)
  - **RECORD INFORMATION** - (Record Category, Agency Item No, Record Series Title, Detailed Description of Items and the latest Fiscal Year of Records)
5. Complete one form per box. Make two copies of the transfer form - one goes to Records Retention attached to the box, and the other copy is sent to Records Retention to complete the Records Retention Department section.
  - The copy attached to the box must be taped under handles at the end of the box before sending to Records Retention. Please use clear tape.
  - The department should retain the original of the form until Records Retention sends a completed copy that identifies the File Box Number and Box Location.
6. If you are having Physical Plant Moves and Events move the boxes, please submit the work order to Facilities Management. If you prefer to deliver the boxes yourself, please call to schedule a delivery time.
7. Records Retention will provide a completed copy of the Storage Transfer Form that will identify reference numbers for File Box Number and Box Location.
  - You will need these numbers to request access to your files.
  - If you need to look at your boxes, please call and to schedule an appointment.
8. Boxes will be automatically destroyed in the fiscal year required for destruction, as identified by the Record Category and Series Title provided in the Storage Transfer Form. Departments will not be notified prior to destruction.