

Instructions for Completing the Records Inventory Worksheet

1. This form is used to Identify Records Retention items maintained in each department.
2. Fill in your department name, location of records, name of person taking inventory, phone number, and date.
3. Fill in the Working Records Series Title *(For example: purchasing, payroll, etc.)*
4. Fill in the description of the records in the **Description** Column. The description should include the retention Schedule Agency Item # and the Retention Schedule description.

It is also helpful to include the retention period and the volume. *(For example: Documents that are able to be moved to Archives/Shred as of: XX/XX; Retention Period: AC+X; Agency Item No.: XX.XXX.XX; Vol.: XX (XX pages))*
5. Fill in the **Status** of the records. If you have the original, check Record Copy and Fill in the location.
6. Check the **Record Medium** *(For example: paper, electronic, etc.)*
7. Check the **Arrangement** *(How is it filed.)*
8. Check the **Storage** *(In what do you store the records)*
9. Fill in the **Inclusive Dates** *(this should be the dates of the record that initiated the retention period.)*
10. Best practice would be to attach this form to the records that are being stored.

If you have any questions or need any assistance please reach out to the Office of Institutional Compliance at 254.519.5763 or compliance@tamuct.edu

Texas A&M University - Records Management
RECORDS INVENTORY WORKSHEET

1. AGENCY NAME AND DIVISION		
2. DEPARTMENT / SECTION / UNIT	3. LOCATION OF RECORDS AND/OR FILE CODE.	
4. NAME AND TELEPHONE NUMBER OF PERSON TAKING INVENTORY	5. TELEPHONE	6. DATE:

RECORDS SERIES IDENTIFICATION

7. WORKING RECORDS SERIES TITLE

8. DESCRIPTION (Summary of contents; function of records; form numbers, if any. Continue description on reverse side if needed)

<p>9. STATUS</p> <p><input type="checkbox"/> RECORD COPY LOCATION OF OFFICIAL RECORD ? _____</p> <p><input type="checkbox"/> CONVENIENCE COPY</p>	<p>10. RECORD MEDIUM</p> <p><input type="checkbox"/> PAPER (SPECIFY SIZE) _____</p> <p><input type="checkbox"/> MICROFILM - SPECIFY _____</p> <p><input type="checkbox"/> ELECTRONIC - SPECIFY _____</p> <p><input type="checkbox"/> MAPS, DRAWINGS _____</p> <p><input type="checkbox"/> _____</p>	<p>11. ARRANGEMENT</p> <p><input type="checkbox"/> ALPHABETICAL <input type="checkbox"/> SUBJECT</p> <p><input type="checkbox"/> NUMERIC <input type="checkbox"/> GEOGRAPHICAL</p> <p><input type="checkbox"/> ALPHA-NUMERIC <input type="checkbox"/> CHRONOLOGICAL</p> <p><input type="checkbox"/> OTHER - SPECIFY _____</p>
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<p>12. LINEAR FEET</p> <p>CURRENT TOTAL _____</p> <p>ANNUAL ACCUMULATION RATE _____</p>	<p>13. STORAGE</p> <p><input type="checkbox"/> FILING CABINET <input type="checkbox"/> BOXED</p> <p><input type="checkbox"/> ROLLED <input type="checkbox"/> SHELVING</p> <p><input type="checkbox"/> FLAT <input type="checkbox"/> OTHER-SPECIFY _____</p>	<p>14. INCLUSIVE DATES</p> <p>FROM: _____</p> <p>TO: _____</p>
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FOR USE BY RECORDS MANAGEMENT