RECORDS INVENTORY INSTRUCTIONS

Section 1: OWNER IDENTIFICATION

Enter the name of your Division and the Department, such as Business Office – Accounting or Library cataloging.

Enter your Name and Phone Number.

Enter your Office/Area Number.

For inventories conducted on centralized filing areas or shared server space, state the area inventoried on the NAME section instead of an individual's name. For example: LDN File Room, HR File Room, or Public on Server X – Records Management Folder.

Section 2: PAPER RECORDS INFORMATION (the records series as listed on the agency's approved retention schedule)

Enter where the records are Located, such as the lateral filing cabinet, desk filing cabinet, bookshelf, on your desktop, or in an overhead bin. It would be helpful if you could number your cabinets, shelves, etc. starting from left to right as you enter your cubicle or file room.

Enter the exact location of the file, such as drawer 2, a specific binder in an overhead bin, or directions on your desktop (ie. – left of the computer).

Enter the SFA's Agency Item Number (AIN) as listed on the agency's approved retention schedule. Enter the SFA's Official Records Series Title as shown on the agency's approved retention schedule.

Enter the Retention period that was assigned to the records series as shown on the approved retention schedule. Enter the Size or Volume of records.

Enter the Inclusive Years of the records (include month/year).

If records of the same series are held in multiple locations, start each location entry on a newline. Example:

Location	Specific Location	AIN	Record Series Title	Retention	Size	Years
-Lateral filing cabinet 2; -Desktop	-Drawer 2; -Left of Computer	SFA 1.2.12	Records Inventory Worksheets	US	-6 inches; -4 inches	FY2008 – 2011

Section 3: ELECTRONIC RECORDS INFORMATION

Enter where the records are Located, such as Server Drive (U Drive, F Drive, P Drive, etc.), Outlook, Flash Drive, External Hard Drive, CD/DVD, etc.

Enter the exact location of the file, such as File Path (U:\ARIS\Training), Folder Location (Purchasing Folder), Email, etc. Enter SFA's Agency Item Number (AIN) as listed on the agency's approved retention schedule.

Enter the Official Records Series Title as shown on the agency's approved retention schedule.

Enter the Retention period that was assigned to the records series as shown on the approved retention schedule. Enter the Size or Volume of records (KB, MB, or GB).

Enter the Inclusive Years of the records (include month/year).

Again, if records of the same series are held in multiple locations, start each location entry on a new line.

Section 4: RECORDS NOT ON RETENTION SCHEDULE

Enter where the records are Located, such as Filing Cabinet, Bookshelf, Server Drive (U Drive, F Drive, P Drive, etc.), Outlook, etc.

Enter the exact location of the file, such as Drawer 2, a specific binder, File Path (U:\Library\Training), Folder Location (Purchasing Folder), Email, etc. Enter the Frequency of Use. The records are accessed and used daily, weekly, monthly, yearly, or not at all.

Enter a detailed Description and Contents of the records series. This information is used to assist the Records Liaison in analyzing the records series category to see if the record is already on the retention schedule or if it is a new series that needs to be added.

Email this completed form with a Subject Line of: RECORDS INVENTORY – "Department"

All information on this form must be completed or the form will be returned. If you need assistance, contact the Records Manager, Johna Von Behrens at recordsmanagment.sfasu.edu or 936-468-1536.