INSTRUCTIONS FOR FILLING OUT
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 Retention Schedule Agency Item # and the Retention Schedule description.

5. Fill in the Status of the records. If you house 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 it is filed.)

8. Check the Storage (in what do you store this record.)

9. Fill in the Inclusive Dates (this should be the current dates you store.)

10. Please submit a copy of each worksheet to the Records Officer. These may be emailed to teri.stover@tamut.edu Keep a copy for your reference.