

Transferring Records to University Archives: An Overview



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Important Links

- **Records retention schedule:**
<http://www.utsa.edu/pds/records/forms/SLR105UTSA.pdf>
 - **Records retention overview:**
<http://www.utsa.edu/pds/records/index.cfm>
 - **Records retention policy** (HOP, Section 9.21):
<http://www.utsa.edu/hop/chapter9/9-21.cfm>
 - **University Archives:**
<http://www.lib.utsa.edu/Archives/ua>
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What to Send to the University Archives

- Items on the records retention schedule with Archival Code "I" (or "O" pending review by University Archivist)
- Records that document the organization, function, policies, procedures, operations, and essential transactions of the department.
- Organizational charts
- Official correspondence and memoranda
- Committee minutes
- Photographs (please identify before transferring)
- Annual reports or other reports issued by your department
- Planning documents
- Publications issued by your department
- Note: **Remove CONFIDENTIAL MATERIAL** from files and make arrangements for its safe storage.

What You Should Keep for Your Convenience

- Personnel records of student, staff, and faculty
- Routine and courtesy correspondence such as: acknowledgements, announcements, confirmations, invitations, itineraries, reservations, letters of transmittal
- Material not related to the function or administration of the office:
 - General distribution memos of other offices
 - Publications of other institutions
- Financial records such as:
 - Monthly budget statements
 - Purchase orders
 - Receipts, vouchers, work orders
 - Salary distribution forms

Your Department's Records Help Build the Archives!