University Records Management
Records Inventory System
Step-by-Step Guide
As a State university, we are considered an agency under T.C.A. 10-7-301(1) and are required to follow public record laws and rules established by the Public Records Commission.

The State requires each agency to annually submit a records holding report. In order to submit accurate information, University of Memphis’ faculty and staff are asked to submit an inventory of the records in their possession.
UNIVERSITY RECORDS MANAGEMENT TRAINING
RECORDS INVENTORY SYSTEM

What’s New? The new process will require information previously submitted on the paper form to be inputted in the new RECORDS INVENTORY SYSTEM.
Log-in to access the system.
UNIVERSITY RECORDS MANAGEMENT TRAINING

RECORDS INVENTORY SYSTEM

Available options are to “Enter/Edit Records” or “Certify Records”

“Certify Records” function is only required once a year on or by June 30.
# UNIVERSITY RECORDS MANAGEMENT TRAINING

## RECORDS INVENTORY SYSTEM

**NAME OF SUBMITTER:** Ladonna Curry  
**DIVISION/DEPARTMENT:** Chief Financial Officer  
**DATE:** 04/07/202

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Record Series Title &amp; No.</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Physical Location (Room)</strong></td>
<td></td>
</tr>
<tr>
<td><strong>RetentionPolicy</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Vital Record</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Confidential</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Active/Inactive</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Original or Duplicate</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Type of Media</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Volume</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Unit of Measure</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Records Description</strong></td>
<td></td>
</tr>
</tbody>
</table>

**Submit and Add a New Record**  
**View Disposed Records**  
**Clear Form**
For details regarding the fields, hover cursor above the question marks.

- Submit and Add New Record – Select if adding more records.
- View Disposed Records– indicate yes or no (this question is for future records review). If records are being disposed at the time of entry of the record, respond “yes” in this space.
- Clear Form – Select to remove all information from the form.
For details regarding the fields, hover cursor above the question marks.

• Disposed – indicate yes or no. If records are being disposed at the time of entry of the record, respond “yes” in this space.
  • NOTE: If you have a record series that spans several years and you are only disposing of a particular year, indicate the date of those records disposed. As you will need to keep the other records in the system until the time of disposal.

• Sensitive – indicate yes or no (ex. SSNs, birthdates, etc.)

• Dates of Records – indicate the month and four-digit year (ex. 08-2021)
• Physical Location – list the room and room number where the documents are physically stored.

• Records Series Title & No. – use the dropdown menu to determine the appropriate series related to your records.
• Retention Period – This field is automatically populated based on the “Record Series Title” selected.
• Vital Record – Indicate if the record is vital. To determine if it is a vital record, ask yourself, “if your office was destroyed by a fire or natural disaster, would this document be needed to restart operations?”
• Confidential – Indicate if the record is confidential.
• Active/Inactive – Indicate active if the record was used within the last 6 – 12 mos. Inactive records are those not used within the past year.
• Original/Duplicate – Indicate if the record is the original document and not one that has been submitted to another internal office or external agency.
UNIVERSITY RECORDS MANAGEMENT TRAINING
RECORDS INVENTORY SYSTEM

- Type of Media – Indicate if the record is paper, CD, USB, etc.

- Volume – Provide the volume of the media.

- Unit of Measure – Indicate the unit of measure (paper, MB, or GB)
UNIVERSITY RECORDS MANAGEMENT TRAINING
RECORDS INVENTORY SYSTEM

- Records Description – Provide description of your records (ex. AY2018 student advising files)
Available options are to “Enter/Edit Records” or “Certify Records”

“Certify Records” is only required once a year on or by June 30.
NAME OF SUBMITTER:  Ladonna Curry

DIVISION/DEPARTMENT:  Chief Financial Officer

DATE:  04/07/2021

You responded with 'I have reviewed and submitted official records' for 2021 on 2021-06-01.

You can change your selection below:

- [ ] I have reviewed and submitted my official record documents.
- [ ] I have reviewed my documents but do not have any official records.

[Submit]  [Return to Main Menu]
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THINGS TO REMEMBER

• Once all information is entered, click to “Submit and a New Record to save the document and/or enter a new record.

• The form can be cleared if needed to start over.

• If changes are needed to the newly created record, make the necessary changes and select “Update the Record” to save the changes. Please Note: The dates and/or volume are the only updates allowed.

• If it is determined that the record is not needed or entered in error, select “Delete the Record” to discard those changes. Deleted records cannot be restored. Do NOT use the delete button if you are planning and/or have disposed of the record.

• Certify records by June 30. If no official records, please certify records as such.

• “Disposed” should be selected for any record scheduled for and/or destroyed per the State of Tennessee mandate regarding the proper disposal of records.
UNIVERSITY RECORDS MANAGEMENT TRAINING RESOURCES

For additional questions, please see the Records Management Training website or contact Ladonnal Curry at lcurry@memphis.edu or 901-678-2121.

Record Retention & Disposition Schedule

University Records Management Training: Register in Learning Curve