**UNIVERSITY OF CALIFORNIA** Records Management

POST – President's Offsite Storage Tracking

RECORDING BOX CONTENTS

When you determine that records should go to Iron Mountain offsite storage, it is important to share the inventory you create with Records Management. A handy way to track this information is to use the President's Offsite Storage Tracking (POST) site. This simple data-entry tool helps your department think of your offsite records in terms of the time period they need to be kept.
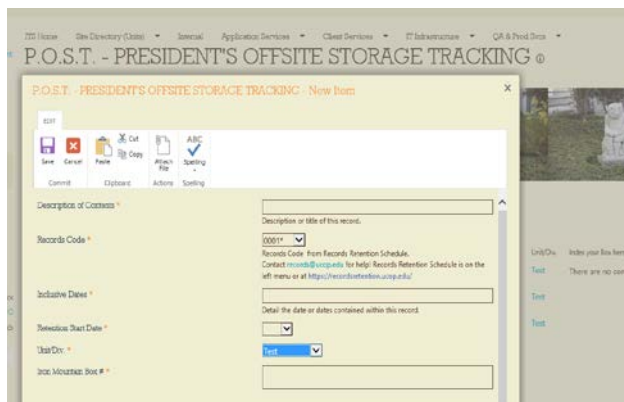
Departmental Repository
Records Management will get you started with a quick training. They will create a profile for you to use to list your new offsite boxes.

- Enter box contents into POST and access inventory anytime and/or download an Excel file to keep with your departmental records.

- Add a Records Code from the retention schedule to help determine when to review records.

RETENTION LOOKUP TOOL

The POST site includes an embedded shortcut to the UC Records Retention Schedule (https://recordsretention.ucop.edu/) to make it easier to decide what type of record you have. It is very important that you keep your records for as long as dictated by the retention schedule – no longer or shorter. Capturing this data for each box of records is one of the most important functions of the POST site.

Learning to use the retention schedule
Records Management is available to help you understand what Records Code and Category should be assigned to various types of records that your department owns. If you prefer to familiarize yourself with the retention schedule via a webinar, a tutorial may be accessed at the Training Materials webpage: http://ucal.us/rmtraining. (Skip to 27:00 of the Retention Schedule presentation.)

DATE RANGE

You should note the range of document dates in each box. Keep records with similar date and purpose together. Doing this now will help future identification, whether the box is to be kept permanently or for only a few years. When your non-permanent records reach the end of their prescribed lifecycle, your team should review them for destruction. If the entire box is scheduled for destruction at the same time, UC will realize significant cost savings.

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