

Instructions for STD-64 Records Action Request: Approval of Records Retention and Disposition Schedule

**Section 1: Contact Information (to be completed for all records series items)**

**Section 2: Descriptive Information (to be completed for all records series items)**

**Record Series Title.** Enter a meaningful Record Series Title. Do not use acronyms.

**Record Series Description.** Enter a brief but informative description of the record series in terms of its form, content, and basic purpose and use. An accurate description should also include a list of the types of documents within the series, such as forms, correspondence, or reports. **Format.** Check the appropriate box for the medium of the records.

**Agency Retention.** Enter the proposed retention period in months and years the records will reside within the agency. **Note:** If the retention period for the record series in question is triggered by an event or is not easily tied to an exact year/month, place an asterisk (\*) following the number of years in the column under retention and explain the use of the asterisk in the Addendum.

**SRC Retention.** Enter the proposed retention period in months and years the records will reside at the State Records Center (SRC). **Note:** If the retention period for the record series in question is triggered by an event or is not easily tied to an exact year/month, place an asterisk (\*) following the number of years in the column under retention and explain the use of asterisk (\*) in the Addendum.

**Section 3: Disposition and Location**

**Disposition Code.** Check the appropriate box for the disposition code; what becomes of the records once the final retention period is met.

**Vital Records?** Refer to your agency Continuity of Operations Plan (COOP) to identify whether the record series is a Vital Record by definition. See Manual 210.8 for definition.

**Cubic Foot Measurements (to be used in annual accumulation and current volume calculations)**

Letter-size drawer or box = 1.5 cu. ft. 4 x 6 card, six 12" rows = 1.0 cu. ft. Legal-size drawer or box = 2.0 cu. ft. 4 x 6 card, three 24" rows = 1.0 cu. ft.

Letter-size, 36" shelf = 2.0 cu. ft. 5 x 8 card, four 12" rows = 1.0 cu. ft.

Legal-size, 36" shelf = 2.5 cu. ft. 5 x 7 card, two 24" rows = 1.0 cu. ft.

3 x 5 card, ten 12" rows = 1.0 cu. ft. Tab card, five 14" rows = 1.0 cu. ft.

3 x 5 card, five 24" rows = 1.0 cu. ft. Tab card, three 24" rows = 1.0 cu. ft.

**Section 4: Justification and Analysis (to be filled out for all record series items)**

**Section 5: Exception from General Records Retention and Disposition Schedule (Complete only if an agency is requesting an exception from using a General Records Retention and Disposition Schedule and keeping a record series on the agency-specific records retention and disposition schedule).**

**Section 6: Electronic Records (Complete only if format is Electronic or Portable Media). NOTE: This section is to be completed by the responsible IT Contact.**