**INVENTORY MANAGEMENT WORKSHEET**

An inventory of records in the work area (paper or electronic) by which department/staff ensure conformity to approved record schedule and proper retention.

|  |  |
| --- | --- |
| Today’s Date |  |

|  |  |
| --- | --- |
| Department/Location |  |
|  |
| Name |  |

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| **INSTRUCTIONS:** Enter your records in the table below, review the Record Schedule that relates to these records and note the RDA # and retention information provided on the record schedule. Any records requiring a confidential destruction will be part of the confidential destruction process initiated by the Records Officer. Refer to the [Records Management](https://www.uwgb.edu/records-management/) website for additional forms.  |

| **Media** | **Department Record Description** | **Dates** | **RDA #** | **RDA Record Schedule Title** | **Retention** | **To Archives** | **Destroy** | **Confidential?** | **Original or Copy?** |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| E-File | Emails | 2009-2015 | ADMIN351 | External Communications | EVT+3 Years | X |  |  | O |
| Paper | Staff Progress Reports | 2005-2020 | ADMIN354 | Activity Reports | CR+1 Year |  | X |  | Both |
| E-File | Department Desk Instruct | 2008-2020 | ADMIN453 | Training Course Materials | EVT+3 Months |  | X |  | Both |
| E-File | Shop+UW Invoices | 2005-2010 | FIS00020 | Receipt & Disbursement | FIS+6 Years |  | X |  | Both |
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