NOTE: UPDATED INSTRUCTIONS FOR COLUMN g. and Block 11

RECORDS MANAGEMENT

INSTRUCTION FOR COMPLETING THE DISPOSITION REQUEST FORM

Blocks 1 - 3: Administration/College, Department/Office, Unit/Program
Identify the organization and the appropriate element having responsibility for the records
Examples:
- Administration/College > Administrative Affairs
- Department/Office > Finance & Accounting
- Unit/Program > Property

Block 4: Address
Enter the address of the office submitting the form (use your campus box number). This is the address to which the request will be returned after review.

Block 5: Contact
Indicate the name and telephone number of the person immediately responsible for the maintenance and security of the records. This is the person to whom inquiries regarding the records will be directed.

Block 6: Submitted by
The signature, title, and the date of an authorized person are required before the request will be processed. This may or may not be the same as the contact person, block 5.

Block 7: Records management, General Counsel & Archival Review
For Records Management, General Counsel & Archives use ONLY.

Block 8: Notice of Intention
Indicate the disposition method to be used for the records listed in block 9.

Block 9: List of Record Series
It is here that you will identify each of the record series that you are seeking disposition approval.

Column a: Schedule Number
You should identify the appropriate schedule number from the General Records Schedule
- Example: GS1-SL

Column b: Item Number
You should identify the appropriate schedule number from the General Records Schedule that coincides with the schedule number you indicated in column a.
- Example: 189
If the record series you are listing is a duplicate or are copies, place the letter b after the item number otherwise it will be assumed that the record series you are listing is record copy/original document(s)
- Example: 189b

Column c: Title
You should identify the appropriate record series title as indicated in the General Records Schedule that coincides with the schedule and item numbers listed in columns a. and b.
- Example: Access Control Records

Column d: Retention
This column is for Records Management Use ONLY

Column e: - Inclusive Dates
You should identify the range of dates for the records that you are requesting disposition approval on.
- Example: 01/01/91 – 12/31/93

Column f: - Volume in Cubic Feet
You should indicate the number of cubic feet of records to be dispositioned for the record series indicated. See calculation chart below
Column g: Disposition Action & Date
You should indicate the disposition action taken (method ex. Shredding), the date completed and name of vendor used if available
- Example: Recycled – shredding/Cintas 7/2/1999

Block 10: Disposal Authorization (For Records Management Use ONLY)

Block 11: Disposal Certificate
This block requires the signature and title of the custodian or designee of the records along with that of a witness, indicating that the destruction or other disposition for the listed records has been completed as indicated in column g.
Column g. should include date, method (ex. shredding) and vendor if applicable
THIS BLOCK IS TO BE COMPLETED ONLY AFTER DISPOSITION REQUEST HAS BEEN APPROVED.

Physical destruction guidelines set forth in Rule 1B-24.003(10), Florida Administrative Code:
(a) For paper records containing information that is confidential or exempt from disclosure, appropriate destruction methods include burning, pulping, pulverizing, shredding, or macerating. High wet repellent paper, paper Mylar, durable-medium paper substitute, or similar water repellent papers are not sufficiently destroyed by pulping and require other methods such as shredding or burning.
(b) For electronic records containing information that is confidential or exempt from disclosure, appropriate destruction methods include physical destruction of storage media such as by shredding, crushing, or incineration: high level overwriting that renders the data unrecoverable; or degaussing/demagnetizing.
(c) For other non-paper media containing information that is confidential or exempt from disclosure, such as audio tape, video tape, microforms, photographic films, etc., appropriate destruction methods include pulverizing, shredding, and chemical decomposition/recycling.
(d) Agencies shall not bury confidential or exempt records since burying does not ensure complete destruction or unauthorized access.

Upon completion of COLUMN g. and Block 11, make a copy for your file and return the original to the Records Management Office for permanent retention.

RECORDS VOLUME CONVERSION TO CUBIC FEET MEASUREMENTS

| Cassette Tapes (200) | 1.0 cu. Ft. |
| Letter-size, drawer or box | 1.5 cu. Ft. |
| Legal-size, drawer or box | 2.0 cu. Ft. |
| Letter-size 36” shelf | 2.0 cu. Ft. |
| Legal-size 36” shelf | 2.5 cu. Ft. |
| Magnetic Tapes (12) | 1.0 cu. Ft. |

CALCULATING ELIGIBILITY DATES
There are three types of retention requirements that apply to “years”

Anniversary (years) – from a specific date  Example: 3 years
If a record has a “3 year” retention, the eligibility date would be 3 years after the ending date of the record.

<table>
<thead>
<tr>
<th>Retention Period</th>
<th>Date to Start Counting</th>
<th>Add # of Years</th>
<th>Date Eligible for Destruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 years</td>
<td>7/31/1997</td>
<td>+ 3</td>
<td>7/31/2000</td>
</tr>
</tbody>
</table>

Calendar (Years) – January 1st thru December 31st  Example 3 calendar years
If a record has a “3 calendar year” retention, the eligibility date would be 3 years after the end of the calendar year that the last record applies.

<table>
<thead>
<tr>
<th>Retention Period</th>
<th>Date to Start Counting</th>
<th>Add # of Years</th>
<th>Date Eligible for Destruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>3 calendar years</td>
<td>12/31/1997</td>
<td>+ 3</td>
<td>1/1/2001</td>
</tr>
</tbody>
</table>
Fiscal (Years) – Example: 3 fiscal years
If a record has a “3 fiscal year” retention, the eligibility date would be 3 years after the end of the fiscal year that the last record applies.

Retention Period | Date to Start Counting | Add # of Years | Date Eligible for Destruction
--- | --- | --- | ---
3 fiscal years | 6/30/1998 | + 3 | = 7/1/2001

Other types of retention:

Months or days – Example: 3 months or 90 days

OSA – Retain until obsolete, superseded or administrative value is lost. With this retention, a record is eligible for destruction whenever it is no longer of any use or value. It could vary from 5 years after creation of the record to the day that it was created.