



# INVENTORY and ANALYSIS FORM

## INSTRUCTIONS, Revised

*This form is for the transfer of custody to records storage only and does not authorize the destruction of County Documents.*

1. **Records Inventory Taker** – This is usually the Records Supervisor for the section/office and will be the person called when questions arise about its content or retention.
2. **Department** – Enter your department name, i.e. District Attorney, District Clerk, JP, Commissioners Court, Human Services.
3. **Section** – Enter your department section, i.e. Criminal, Civil, Administration, Budget, etc. In the case of multiple courts such as JP, enter 1-1, 1-2, etc.
4. **Room Number or Address** – enter the room number (and circle Courthouse) **or** physical address (and circle the “not at Courthouse”) indicating where the records are going to be picked up from.
5. **Record Working Series Title from Texas State Library Schedule** – Enter the table of contents section from the Texas State Library schedule the codes are being obtained from. The section will be listed in #10. **Example:** Part 2 Financial Records.  
<http://www.tsl.state.tx.us/slr/recordspubs/localretention.html>
6. **Description of Records** – Describe the contents of the records here. This should have enough detail so the contents can be easily identified at the end of the retention period.  
**Example:** Banking Records – Statements, Canceled Checks, Deposit Slips.
7. **Inclusive Dates** – Enter the files content date coverage from earliest to latest by month/year.
8. **# of Boxes in Series** – Enter this boxes number in the series. 1 of 1, 1 of 2, 1 of 15, etc.
9. **Department Heads Initials and Date** - Transfer of custody requires the department’s records manager to indicate approval of the transfer. Only the Department Head or Elected Official can authorize a change in their disposition or custody, unless otherwise noted.
10. **State Records Section** – Enter the local schedule publication the records content fall under, i.e. County Clerk, General Records... They are available for download at:  
<http://www.tsl.state.tx.us/slr/recordspubs/localretention.html>
11. **State Records Number** – Enter the Code number that describes the contents of the files.  
**Example:** 1025-28
12. **State Retention Period** – Enter the retention period the files are to be kept. The retention period indicates the documents life cycle. If the documents are kept at the Court House then transferred to the Warehouse, the time is split between the two, not at one location. **Example:** FE + 5yrs.
13. **Retain Until Date** – Enter the date of the retention period.  
In the case of Code “AV” – Administratively Valuable, a retention date must be determined prior to storage.

The remaining box on the form is for warehouse use.