

C.02.04.01 Records Management Procedure

Responsible Department: Finance and Fiscal Services

Based on Board Policy: [C.02.04](#) - Records Management

Approved: 8-18-09

Last Amended: 2-26-14, 6-16-25, 10-13-25

This procedure provides detailed guidelines for defining the duties of departmental personnel responsible for managing records.

Roles and Responsibilities:

- Records Steward: An employee designated by department leadership to oversee and ensure compliance with records management policies within their department.
 - Oversee departmental compliance with records management policies.
 - Ensure that all records are properly classified, stored, and disposed of in accordance with retention schedules.
 - Serve as the primary liaison between their department and the Records Management Office.
- Records Assistant: An employee assigned to support the Records Steward in executing records management tasks, including inventory tracking, retention scheduling, and disposal processes.
 - Assist the Steward in maintaining accurate records inventories.
 - Support the implementation of retention schedules and ensure timely disposal of records.
 - Report any discrepancies or issues to the Records Property Steward.

Retention Schedules:

- Specifies the duration for retaining different types of records.
- Departments must follow approved schedules and ensure records are accessible until the retention period has expired.

Disposal Protocols:

- Outlines methods for the secure and compliant disposal of records.
- Departments are responsible for following and adhering to established records creation and retention protocols.
- Records must be disposed of securely and in compliance with approved retention schedules.
- Approved methods include shredding, secure digital deletion, or transfer to the Records Management Office/Archives when required.
- No records may be destroyed outside of the approved process.

Training Requirements:

- All employees, including Records Stewards and Assistants, must complete mandatory Records Management training upon appointment and at regular intervals thereafter as determined by the Records Management Office.

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- Departments are accountable for ensuring designated staff complete training by the required deadlines.

Documentation and Compliance:

- Departments must maintain records of training completion for all personnel involved in records management tasks.
- Regular audits will be conducted to ensure adherence to this procedure and identify areas for improvement.

The College District Records Management Procedures and records retention schedules are available through the link below:

<https://alamo0.sharepoint.com/sites/RecordsManagement>

References:

- *Records Management SharePoint Site*
- *Alamo Colleges Records Management Procedures Manual*
- *Texas State Library and Archives Commission Records Retention Schedules*

Legal Reference - TACC Policy Reference Manual

CIA(LEGAL) - Equipment and Supplies Management: Records Management