**Trustee Account Records Disposal Guidelines**

Trustee Accounts are required to keep all original records for 7 years. To dispose of the records after the required amount of time, submit Records Disposal Authorization form RC-108 to the TSOS for approval one month prior to proposed date of disposal. TSOS will obtain the approval from the University Archivist. The form must be submitted to the Archivist at least 20 days prior to proposed date of disposal.

The records management program at the University is managed by Archivist Betsy Pittman at the Thomas J. Dodd Research Center. Detailed information and forms can be found on the Dodd Center’s website by clicking on Records Management or go to www.lib.uconn.edu/online/research/speclib/ASC. Select Records Management, Procedures, State Retention Schedules, General Schedules. Most of Trustee Account records will fall under, S1, S2 or S3. The records must be properly identified by type within series title and item number. We recommend organizing and storing records by type and date until ready to dispose. For example, Check Requests - 7/1/2019-6/30/2020.

Once approved for disposal, Organization must follow University procedure to have the records picked up to shred. If records are not deemed to be original by TSOS (meaning another area has the original record and is following retention guidelines) they may be shredded immediately. If organization has paper that was digitized, they may request that the digital record be considered original so that the paper can be shredded immediately.

Materials to be shredded should be boxed, covered, taped closed, and labeled with the department name phone number and contact person. Items for shredding should have no metal parts such as paperclips, heavy duty staples, binders, and no wire bound notebooks.