

Purchasing Records Retention Schedule										
(Contact persons: John Klopp: 5-0382, Dennis Gritsch: 5-0392)										
DESCRIPTION	CUSTODIAN	RETENTION REQUIREMENTS (yrs.)			OFFICIAL?	CONFID.?	VITAL?	CURRENT	DUPLICATED	SAFEGUARD
		LEGAL	ACTIVE	NON- ACTIVE				RECORD	ELSEWHERE?	MEASURES
								FORMAT		CURRENTLY IN PLACE?
(CY: Current Yr)										
Requisitions	Purchasing	State-3 Federal-3	CY + 5		Yes-for the order from the dept.	No	No	2 yrs.- Paper yrs. - Film	5 Crest has copy of film	Crest has copy of film
Purchase Orders	Purchasing	State-3 Federal-3	CY + 5		Vendor	No	No	Electronic (PeopleSoft)		Regular backup of data
Request for Quotations (includes contracts)	Purchasing	State-3 Federal-3	CY + 7		Yes	Yes until award is made	Yes	2 yrs.- Paper yrs. - Film	5 Crest has copy of film	Crest has copy of film
Vendor Applications	Purchasing	State-3 Federal-3	Current version		Yes	No	No	Microfilm	Crest has copy of film	Crest has copy of film
W9 (associated with vendor applications)	Purchasing	State-3 Federal-3	Current version		Yes	No	Paper-Yes	2 mos.- Paper Other - Film	Crest has copy of film	Crest has copy of film
Maintenance agreements	Purchasing	State-3 Federal-3	Life of item		Yes	No	No	Paper	Vendor maybe	
Vouchers & Invoices for Purchasing dept. acquisition < \$10,000 (after 1/1/98)	Purchasing	State-3 Federal-3	CY + 3		Yes	No	No	Paper	Yes *	
Office Correspondence of an Official Nature	Purchasing	State-3 Federal-3	Permanent		Yes	No	Some yes	Paper, PC (?)	No	Some on PC backup
NOTES:										
1) The retention period for convenience copies is 3 years which is a guideline and not a requirement.										
2) The custodian has official responsibility for retention and disposition of the record.										
3) An "Official Record" is the single official copy of a document maintained on file by an administrative unit of FUS which is usually, but not always, the original.										
Convenience copies are not official records.										
4) A "Confidential Record" is unavailable to the general public unless otherwise ordered by court, by the lawful custodian or by another person duly authorized.										
Medical, student and personnel files are examples.										
5) A "Vital Record" is one which is absolutely essential in order to continue doing business or to preserve the rights of the unit, its employees and the general public.										
6) "Office Correspondence of an Official Nature" refers to policies, procedures, reports (internal or external), etc. that are used in the administration and management										
of the department and that should be memorialized.										