

## Records Retention Schedule Template

### Art and Art History Diane Schaeffer 5-1770

DESCRIPTION	CUSTODIAN	RETENTION REQUIREMENTS (yrs.)			OFFICIAL?	CONFID.?	VITAL?	CURRENT RECORD FORMAT	DUPLICATED ELSEWHERE?	SAFEGUARD MEASURES CURRENTLY IN PLACE?
		LEGAL	ACTIVE	NON-ACTIVE						
		(CY: Current Yr)								
Central Files	Marlo Jack		Current Version		yes/no	no	yes/no	paper	yes/no	none
<u>Personnel Files</u>										
Faculty offer letters and related documentation	Diane Schaeffer		3 yrs after leaving UI until P&T decision is complete		no	yes	no	paper	yes	none
Probationary reviews	Diane Schaeffer		Indefinitely		no	yes	no	paper	yes	none
P&T files for current faculty	Diane Schaeffer		7 yrs after departure		yes	yes	yes	paper/pc	yes	none
P&T files for faculty who left UI	Diane Schaeffer		2 yrs after conclusion & action		yes	yes	yes	paper/pc	yes	none
Redacted versions of P&T files	Diane Schaeffer		All for probationary, 2 most recent for Post-Tenure		yes	yes	yes	paper	yes	none
Peer Reviews	Diane Schaeffer		Current version		yes	no	no	paper	yes	none
Faculty CVs	Diane Schaeffer		The two most recent		yes	yes	no	paper/pc	no	none
Performance Appraisals for Merit and P&S Staff	Diane Schaeffer	Indefinitely	Indefinitely		no	yes	no	paper	yea	none
Immigration documentation	Schaeffer & Jack		CY + 3		yes	yes	yes	paper	no	none
Faculty Searches	Diane Schaeffer		2 most recent appts		no	no	no	paper	yes	none
Adjunct Faculty files	Diane Schaeffer		CY + 3		yes	no	no	paper	summary	none
Reports on Faculty Extramural Activities	Diane Schaeffer		Indefinitely		no	yes	no	paper	yes	none
Merit & P&S Reclas appeals	Diane Schaeffer		CY + 3		no	yes	no	paper	yes	none
Permanent Staff Payroll	Diane Schaeffer		CY + 3		no	yes	no	paper	yes	none
Hourly Staff Payroll	K NcGlynn		CY + 3		no	yes	no	paper /mainframe	yes	microfiche

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Strategic Plan	Diane Schaeffer		2 most recent		yes	no	yes	paper/pc	yes	none
Departmental Review	Diane Schaeffer		most recent		yes	no	yes	paper/pc	yes	none/pc
General Expense Budget	Diane Schaeffer		CY + 3		no	no	yes	paper/pc	yes	none
Equipment Requests	Diane Schaeffer		CY + 3		no	no	no	paper/pc	no	none
Equipment Inventory	Schaeffer & McGlynn		CY + 3		no	no	no	paper	yes	none
Space Inventory	Diane Schaeffer		CY + 3		no	no	no	paper	yes	none
Travel Vouchers	K. McGlynn		CY + 3		no	no	no	paper	nyes	microfiche
Requisitions	K McGlynn		CY + 3		no	no	no	paper	yes	microfiche
Vouchers & Inv<\$10K	K McGlynn		CY + 3		no	no	no	paper	yes	microfiche
Vouchers & Inv>\$10K	K McGlynn		CY + 3		no	no	no	paper	yes	microfiche
Procurement Card Rep	K McGlynn		CY + 3		no	no	no	paper	yes	AP web data base
Maintenance Agreements	K McGlynn		CY + 3		no	no	no	paper	yes	none
Course Info & Schedules	Diane Schaeffer		CY + 3		no	no	no	paper/pc	yes/no	noe
Meeting Minutes & Agenda	Diane Schaeffer		Indefinitely		yes	no	no	paper	yes/no	none
Faculty Dev Files	Diane Schaeffer		3 years after completion		no	no	no	paper/pc	yes	none
Class lists	Marlo Jack				no	yes	yes	paper/database	yes	
Foundation Accts	Diane Schaeffer		CY + 3		no	yes	no	paper/pc	yes	none/pc
Gift Correspondence	Schaeffer & Jack		CY + 3		yes	yes	no	paper/pc	no	none/pc
Scholarship & Awards	Schaeffer & Jack		CY + 3		yes	yes	no	paper/pc	yes/no	none
Grad Admissions	L. Jorgensen		CY		yes	yes	yes	paper	yes	none

Effective Date: ?

10/29/01

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		(CY: Current Yr)								
Current Grad Student files	L. Jorgensen		Until Matriculate		yes	yes	yes	paper	yes/no	none
Alumni Files	L. Jorgensen		Indefinitely		yes	yes	yes	paper/disk	no	none
Stats/Lists	L. Jorgensen		Indefinitely		no	yes/no	yes	paper	no	none
Abridge Faculty Bios	L. Jorgensen		CY		no	no	no	paper/pc	yes	none
Studio Div Thesis Works	Thesis Gallery		Indefinitely		yes	no	no	varying media	no	none
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.										