

Records Retention Schedule Template

Audio Visual Center - Kim Wall 5-2539										
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)								
Royalty agreements/marketing contracts	Marketing		Permanent		Yes	Yes	No	Paper	No	
Backup deposit records, CV's etc.	AV Center		CY + 3		Yes	No	No	Paper	Yes, Accounting Svcs	
Budgets	AV Center		CY + 3		Yes	No	Yes	Paper	Yes, Budget Office	
Inventory/Assets	Property Management		CY + 3		No	No	No	Computer	Yes, Prop Mgt	
Payroll and Personnel Files	Human Resources		CY + 3		No	Yes	No	Computer	Yes, HR	
Personnel Files (recommendation letters & etc.)	AV Center		CY + 3		Yes	Yes	Yes	Paper	No	
Search Materials (for vacancies)	AV Center		CY + 3		Yes	Yes	Yes	Paper	No	
Procurement Card Vouchers	Voucher Processing		CY + 3		No	No	No	Paper	Yes, Voucher Processing	
Purchase Orders	Purchasing		CY + 3		No	No	No	Paper	Yes, Purchasing	
Requestions/outgoing	AV Depts		CY + 3		No	No	No	Paper	Yes, Purchasing	
Requestions/incoming	AV Center		CY + 3		Yes	No	Yes	Paper	Yes, Dept sending req.	
Job sheets/invoices for our services	AV Center		CY + 3		Yes	No	Yes	Paper	No	
Blanket Purchase Orders	Purchasing		CY + 3		No	No	No	Paper	Yes, Purchasing	
Statements of account & associated financial reports	Accounting Services		CY + 3		No	No	No	Paper	Yes, Accounting Services	
Travel vouchers	Travel Dept.		CY + 3		No	No	No	Paper	Yes, Travel Dept.	
Vouchers and Invoices	Accounting Services		CY + 3		No	No	No	Paper	Yes, Accounting Svcs	
Notes:										

Effective Date: ?

3/8/01

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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.										