

Business Manager Proposed Records Retention Schedule

(Contact persons: Linda Annis: 5-0129, Dave Beney: 5-0301)

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)								
B-Docket Material: Agendas and backup	Lisa Krause		Permanent		Yes	Yes	Yes	Paper, H: drive	yes- from sender	File Cabinet
Docket Books: Compilation of B docket	Lisa Krause		Permanent		Yes	No	No	Paper	yes	File Cabinet
BOR Minutes	Bus Mngr		Permanent		Yes	No	No	Paper	yes	File Cabinet
Green sheets: Verification to originating dept.	D. Beney		Permanent		Yes	Yes	Yes	Paper	>\$50K in B. Docket	File Cabinet
Leases	Linda Annis		Current-Permanently	Expired-Perm.	Yes	Yes	Yes	Paper	yes- BOR, Landlord, UI dept. head	File Cabinet
Tenant Property: FUS	Linda Annis		Permanent		Yes	Yes	No	Paper, PC	Heritage Prop. has copy of lease	File Cabinet
Tenant Property: VP Rsearch	Linda Annis		Permanent		Yes	No	No	Paper, PC	No	File Cabinet
Household Moves	Linda Annis		CY + 2	3 years	Yes	Yes	Yes	Paper, H: drive	Some yes	File Cabinet
Trusts	Bus Mngr		Permanent		Yes	Yes	Yes	Paper	Treas. Office has copy of wills	File Cabinet
Land (Buy, sell)	Linda Annis		Permanent		Yes	No	Yes	Paper, L: drive	Access dbase	Fireproof cabinet
Building Register	Bus Mngr		Permanent		Yes	No	Yes	Mainframe, PC	DCS	
Long-term contracts	Bus Mngr unless delegated	CY + 10 after contract has expired.	CY + 10 after contract has expired	Permanent	Yes unless delegated	No	Yes	Paper	Some at Gen. Counsel	Fireproof cabinet in JH
Short-term contracts	Bus Mngr unless delegated		CY + 10 after contract has expired	Permanent	Yes unless delegated	No	Yes	Paper	Some at Gen. Counsel, Bus Mngr	
Final Capital Project Report	D. Beney		Permanent		Yes	No	Yes	Paper, PC	No	File Cabinet
Sales Tax Refunds	Bus Mngr		Permanent		Yes	No	No	Paper	FSG: A&E	File Cabinet

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Office Correspondence of an Official Nature	Tenant Prop.	State-3 Federal-3	Permanent		Yes	No	No	Paper, PC		
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.										