

Center for Teaching (CfT) Records Retention Schedule

(Contact Person: Scott Hansen, 5-6048)

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)								
Backup doc. For cv's, deposits, purchases, receiving doc's.	CfT	CY+3	CY+3		Yes	Yes	No	Paper, PC	Yes	Locked Office
Budgets	CfT	3 yrs	CY+3		Yes	No	No	Paper, PC	Yes	Locked Office
Gift & Grant Awards	Grant Accounting	CY+5 after award expired	CY+3	Permanent as needed	No	No	No	Paper	Yes	Locked Office
Inventory/Assets	Property Management	3 yrs	CY+3		No	No	No	Paper, PC	Yes	Locked Office
Maintainance Agreements	Purchasing		CY+3		No	No	No	Paper	Yes	Locked Office
Office Correspondence of an Official Nature	CfT	3 yrs	kept permanently		Yes	Yes, some	No	Paper	Yes, some	Locked Office
Personnel files	CfT	CY + 3 after termination	CY+3 after termination		Yes	Yes	No	Paper	No	Locked Office
Position classifications	CfT		CY+3		Yes	Yes	No	Paper	Yes	Locked Office
Procurement Card	Processing Team		CY+3		No	Yes	No	Paper	Yes	Locked Office
Purchase Orders	Purchasing		CY+3	4 yrs	No	No	No	AP-PO Database	Yes	Locked Office
Requisitions	Purchasing		CY+3		No	No	No	AP-PO Database	Yes	Locked Office
Reviews & Self Studies	CfT		kept permanently		Yes	Yes, some	No	Paper, PC	Yes	Locked Office
Search Materials	CfT	CY+3	CY+3		No	Yes	No	Paper	Yes	Locked Office
Statement of Account	Accounting Services		CY+2		No	No	No	Paper	Yes	Locked Office
Survey/Reports	Dept		kept permanently		Yes	Yes, some	No	Paper, PC	Yes	Locked Office
Travel Vouchers	Travel		CY+3		No	No	No	Paper	Yes	Locked Office
Vouchers & Invoices (before 1/1/98)	A/P		CY+3		No	No	No	AP-PO Database	Yes	Locked Office
Vouchers & Invoices <\$10,000 (after 1/1/98)	CfT	3 yrs	CY+3		No	No	No	Paper, PC	Yes	Locked Office
Vouchers & Invoices >\$10,000 (after 1/1/98)	A/P		CY+3		No	No	No	Paper, PC	Yes	Locked Office
Notes:										
1) The retention period for convenience copies is 3 years which is a guideline and not a requirement.										

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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.										