

Records Retention Schedule Template

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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)								
Graduate Student Records	C. Schrage		5 Years	Indefinitely	Yes, Dept	Yes	Yes	Paper	Reg Office, Grad College	Stored in file cabinet
Undergraduate Student Records	J. Lillig		4 Years	1 Year	Yes, Dept	Yes	Yes	Paper	Reg Office	Stored in file cabinet
Payroll	C. Schrage		CY	3 Years	Yes, Dept	Yes	Yes	Paper	Payroll	Stored in file cabinet
E=Mails	C. Schrage		CY	1 Year	Yes, Dept	Yes	Yes	Paper & Computer	No	Computer files
Office Memos	C. Schrage		CY	Indefinitely	Yes, Dept	Yes	Yes	Paper	No	Stored in file cabinet
Faculty Tenure Files	R. Hirokawa		CY	Indefinitely	Yes, Dept College	Yes	Yes	Paper	College Liberal Arts	Stored in file cabinet
Budgets	Brenneman		CY + 3		Yes	No	Yes	Paper, PC		None
Faculty File	Brenneman		Permanent		Yes	Yes	Yes			None
Film, Video DB	Brenneman		Permanent		No	No	Yes	PC		Back up
Office Correspondence of an Official Nature	Brenneman		CY		No	Y/N	No	PC/Paper		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.										