

## Faculty & Staff Disability Services Proposed Records Retention Schedule

(Contact person: Jan Gorman: 5-0052)

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)								
Employee File Notes (by employee)	FSDS	State-3 Federal-3	Permanently		Yes	Yes *	Yes	Before 1/98; Paper After 1/98; Server	Paper-No	Server backed up weekly
Community Service Agency, Soc. Security Generated forms, correspondence (medical; by employee)	FSDS		Permanently		Yes	Yes	Yes	Paper	Yes/Probably	
Post-accommodation request, correspondence-Initiated by FSDS	FSDS		Permanently		Yes	Yes *	Yes	Paper	No	
Post-accommodation request correspondence-Initiated by the dept.	Dept/Employee		CY + 3		No	Yes *	Yes	Paper	Yes	
Applications/Resumes	Employment Services Dept.		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Catastrophic Event/Benefit	Staff Benefits		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Disability Accommodation Request form	Affirmative Action		Permanently		Convenience copy	Yes *	Yes	Paper	Yes	
Disciplinary	Dept.		CY + 3		Convenience copy	Yes	No	Paper	Yes	
FMLA	Dept.		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Grievances	HR-Empl/Labor		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Insurance Benefits	Insurance company		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Job Description	Dept.		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Payroll	Payroll		CY + 3		Convenience copy	Yes	No	Paper, PC	Yes	
Performance Evaluations	Dept.		CY + 3		Convenience copy	Yes	No	Paper	Yes	

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Requisitions	Employment Services		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Workers Comp	Dept., Staff Benefits		CY + 3		Convenience copy	Yes	No	Paper	Yes	
Office Correspondence of an Official Nature		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.										
*: "Employee File Notes" are of the strictest confidentiality requirements.										