

Records Retention Schedule Template

Holden Comprehensive Cancer Center Alicia Keinzle										
DESCRIPTION	CUSTODIAN	RETENTION REQUIREMENTS (yrs.)			OFFICIAL?	CONFID.?	VITAL?	CURRENT RECORD	DUPLICATED ELSEWHERE?	SAFEGUARD MEASURES
		LEGAL	ACTIVE	NON-ACTIVE				FORMAT		CURRENTLY IN PLACE?
		(CY: Current Yr)								
Research Grants/Contracts	VP for Research Sponsored	VP for Research Sponsored	CY + 10		yes	yes	yes	electronic/paper	yes	VP for Research Office has paper copy of documents
Budgets/Fiscal Records	Holden Cancer Center		CY + 3		no	yes	yes	electronic/paper	no	Computer back-up by Hospital information
Correspondence of an official nature	Holden Cancer Center		CY + 3		no	yes	no	electronic/paper	no	Computer back-up by Hospital information
Minutes of Center Meetings	Holden Cancer Center		CY + 3		no	no	no	electronic/paper	no	Computer back-up by Hospital information
Personnel/Position Classifications	Holden Cancer Center		CY + 3		no	yes	no	electronic/paper	yes	Originals in Central Admin.
Gifts/Awards	UI Foundation		CY + 3		yes	yes	yes	electronic/paper	yes	Originals at UIF
Financial Management Summaries	Accounting Services		CY + 3		no	no	yes	electronic/paper	yes	Originals in Accounting Services
Inventory	Property Management		CY + 3		no	no	no	electronic/paper	yes	Original in Plant Management Office
Requisitions/Purchase Orders	Holden Cancer Center		CY + 3		no	no	no	electronic/paper	yes	Final originals in Dept. of Purchasing
Databases	Holden Cancer Center Admin.		CY + 3		no	yes	yes	electronic/paper	no	Computer back-up by Hospital information
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.										