

## Records Retention Schedule Template

Institute of Public Affairs - Sandy Kindhart 5-4520

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)								
All payroll files (including Staff Benefits)	Human Resources	N/A	Permanent		No	Yes	No	Paper	Yes	File drawer (locked)
Budget Documents	IPA & Cont. Education	3 Years	Permanent		Yes	No	No	Paper	Yes	File drawer
Purchase Orders	Purchasing	N/A	7 Years +		No	No	No	Paper	Yes	File drawer
Backup documentation for cv's, deposits, purchases	IPA & Cont. Education	3 Years	7 Years +		Yes	No	No	Paper	Yes	File drawer
Official office correspondence	IPA	3 Years	7 Years +		Yes	No	No	Paper & electronic	No	File drawer & computer
Inventory/Equipment	Property Management	N/A	7 Years +		No	No	No	Paper	Yes	File drawer
Travel Vouchers	Travel	N/A	7 Years +		No	No	No	Paper & electronic	Yes	File drawer
Statements of Account and University wide reports	Business Office	N/A	7 Years +		No	No	No	Paper	Yes	File drawer
Interdepartmental Charges	Accounts Payable	3 Years	7 Years +		No	No	No	Paper	Yes	File drawer
Procurement Card Purchases	Accounts Payable	3 Years	7 Years +		No	No	No	Paper & electronic	Yes	File drawer & computer
Voucher & Invoices	IPA & Accounts Payable	3 Years	7 Years +		Yes	No	No	Paper	Yes	File drawer
Requisitions through Purchasing	Purchasing	N/A	7 Years +		No	No	No	Paper	Yes	File drawer
Requisitions to Departments	IPA	Until service	7 Years +		No	No	No	Paper	Yes	File drawer
Iowa Municipal Management Institute	IPA	3 Years	Permanent		Yes	No	Yes	Paper & electronic	Yes	File drawer & computer
Off Campus Programs materials and files (Goal Setting, Strategic Planning, Government Services Sharing Program, Public Management Assistance, etc.	IPA	3 Years	Permanent		Yes	No	Yes	Paper & electronic	Yes	File drawer & computer
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.										

Effective Date: ?

8/27/01

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(CY: Current Yr)										
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.										