

Records Retention Schedule Template

		Labor Center - Nancy Pounds - 5-4177								
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	NA	permanent		No	Yes	No	paper & electronic	Yes	Locking file cabinet and computer
Budgets	Labor Center & Cont Educ	3 years	permanent		Yes	No	No	paper & electronic	Yes	Locking file cabinet and computer
Purchase Orders	Purchasing	NA	3 years		No	No	No	paper & electronic	Yes	Locking file cabinet and computer
Backup documentation for cv's, deposits, purchases	Labor Center & Cont Educ	3 years	3 years		Yes	No	No	paper & electronic	Yes	Locking file cabinet and computer
Office Correspondence of an official nature	Labor Center & Cont Educ	3 years	permanent		Yes	No	No	paper & electronic	No	Locking file cabinet and computer
Inverntoy/Assets	Property Management	NA	3 years		No	No	No	paper & electronic	Yes	file cabinet
Travel vouchers	Travel	NA	3 years		No	No	No	paper	Yes	file cabinet
Statements of Account & University wide reports	Business Office	NA	3 years		No	No	No	paper & electronic	Yes	file cabinet & computer backup
Interdepartmental charges	Accounts Payable	3 years	3 years		No	No	No	paper	Yes	file cabinet
Procurement card reports	Accounts Payable	3 years	3 years		No	No	No	paper & electronic	Yes	file cabinet & computer backup
Voucher & invoices after 1/1/98	Accounts Payable	3 years	3 years		Yes	No	No	paper & electronic	Yes	file cabinet & computer backup
Vouchers & invoices after 1/1/98	Labor Center & Cont Educ	3 years	3 years		No	No	No	paper	Yes	file cabinet
Requisitions through Purchasing	Purchasing	NA	3 years		No	No	No	paper & electronic	Yes	file cabinet & computer backup
Requisitions to Dept requesting product/service	Labor Center & Cont Educ	Until service						computer backup		
On Campus Program Materials and files	Labor Center & Univ Archives	3 years	3 years		Yes	No	Yes	paper & electronic	Yes	file cabinet & computer backup
Off Campus Program Materials and files	Labor Center & Univ Archives	3 years	3 years		Yes	No	Yes	paper & electronic	Yes	file cabinet & computer backup
Notes:										
1) The retention period for convenience copies is 3 years which is a guideline and not a requirement.										

Effective Date: ?

3/20/01

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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.										