

Records Retention Schedule - Language Media Center

		Sue Otto 335-2332								
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)								
Personnel Files										
P&S Staff personnel files (appointment forms, time sheets, other HR	Otto		Indefinitely	Indef	No	Yes	No	Paper	HR	Locked file
Student personnel files	DeptSupervisor		While employed	Indef	No	Yes	No	Paper	HR	Locked file
Position Search records	Otto		While ongoing	Indef	No	No	No	Paper/ Electronic	HR	Locked file/digital backup
Financial/Budgetary										
Budget/financial reports	Bohde/Otto		CY + 5		No	No	No	Paper	College	Locked file
Statements of account	Bohde/Otto		CY + 3		No	No	No	Paper	College/UI Business Off	Locked file
Copies of purchasing paperwork: blue reqs, Visa	Bohde/ Originator		CY + 3		No	No	No	Paper/ Electronic	Purchasing	Locked file
Copies of other financial transactions: CVs, deposits, Voucher & Invoice	Bohde/ Originator		CY + 3		No	No	No	Paper/ Electronic	UI Business Office	Locked file
Travel vouchers	Dept (traveler)		Indefinitely		No	No	No	Paper/ Electronic	Accts Payable/Travel	Locked file
Contracts/Royalty agreements (PICS)	Bohde/Otto		Indefinitely		Yes	Yes	No	Paper	With other contract	Locked file
Grant Awards	Deptment		CY + 3		No	No	No	Paper	Spons Progs; Grant Agency	File
Departmental										
Office Correspondence of an Official Nature	Staff originator/ recipient		Indefinitely		Yes	No	No	Paper/ Electronic	Yes	Locked file
Permissions & licenses	Dept Staff		Indefinitely		No	No	No	Paper	Publishers; ITS software	Locked file
Inventory	Bohde		CY + 6		No	No	No	Paper	Property Management	Locked file
Class lists (for electronic circulation system)	Johnson		CY + 1		No	Yes	No	Electronic	Registrar	Server/digital backup
Circulation records	Johnson/ Goddard		CY + 1		Yes	No	No	Electronic/ Paper	Instructors	Server/digital backup
Tape exchange contracts	Goddard		CY + 3		Yes	No	No	Paper	Student	Locked file

Effective Date: ?

3/4/02

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		(CY: Current Yr)									
UI ID charge records	Goddard		Indefinitely		No	Yes	No	Electronic	UI Business Office	Server/digital backup	
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.											