

## Records Retention Schedule Template

Records Retention Schedule Template										
DESCRIPTION	CUSTODIAN	Mathematics			Sandy Stockman 5-0781			CURRENT RECORD FORMAT	DUPLICATED ELSEWHERE?	SAFEGUARD MEASURES CURRENTLY IN PLACE?
		RETENTION REQUIREMENTS (yrs.)			OFFICIAL?	CONFID.?	VITAL?			
		LEGAL	ACTIVE	NON-ACTIVE						
		(CY: Current Yr)								
Backup documentation for cv's, deposits, purchases, etc.	Dept		CY + 1	2	No	No	No	Paper	Yes	None
Budgets	Dept/College		CY + 1	2	Yes	No	No	Paper	Yes	None
Gift & Grant Awards	Grant Acctg		CY + 1	4	No	No	No	Paper	Yes	None
Inventory/Assets	Property Manag Office		CY + 1	4	No	No	No	Paper	Yes	None
Maintenance Agreements	Purchasing		CY + 1	Life of Item	No	No	No	Paper	Yes	None
All Payroll Files	Human Resources		CY + 1	Permanent	No	Yes	No	Paper	Yes	PC Backup
Office Correspondence- letters, policys, reports, minutes, etc	Dept		CY	Permanent	Yes	No	No	Paper	No	PC Backup
Promotion and Tenure	College		CY + 1	CY + 7 after Term.	No	Yes	No	Paper/PC	Yes	PC Backup
Purchase Orders	Purchasing		CY + 1	2	No	No	No	Paper	Yes	None
Requisitions to a Dept.	Dept Providing		CY + 1	2	No	No	No	Paper	Yes	None
Requistions-Purchasing	Purchasing		CY + 1	2	No	No	No	Paper	Yes	None
Search Materials	Dept/College/A A		CY + 1	2	Yes	Yes	Yes	Paper/PC	Yes	PC Backup
Statement of Account	Accounting Services		CY + 1	Permanent	No	No	No	Paper	Yes	Web
Student Files-Undergrad	Dept		CY	10-Inactive*	No	Yes	Yes	Paper	No	None
Student Files-Grad	Dept		CY	10-Inactive*	No	Yes	Yes	Paper	No	None
Supplies-keys, books, etc.	Dept		CY	Replaced as Needed	No	No	Yes	Paper	No	None
Travel Vouchers	Travel		CY + 1	2	No	No	No	Paper	Yes	None
Vouchers & Invoices (before '98)	A/P		CY + 1	2	No	No	No	Paper	Yes	None
Vouchers & Invoices (after '98)<\$10,000	A/P		CY + 1	2	No	No	No	Paper	Yes	None

Effective Date: ?

5/29/01

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		Mathematics	Sandy Stockman 5-0781							
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)								
Voucher & Invoices (after '98)>\$10,000	A/P		CY + 1	5	No	No	No	Paper	Yes	None
Notes:										
* Dept keeps student records for 10 years if student did not get a degree and kept permanently if student received degree from Dept.										
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.										