

Oakdale Research Park Retention Schedule					Diann Pavelka & Bruce Wheaton				5-4063	
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)								
ORP Historical Documents (related to the ORP)	ORP		Permanent		Yes	No	No	Paper	VP Research	File Room
ORP Leases	ORP		Term of Lease + 5 Yrs.	CY +5	Yes	Yes	Yes	Paper/PC	Business Office	File Room
Special Purpose Appropriation	ORP		CY + 3 years		No	No	No	Paper	UI Business Office	File Room
Articles of Incorporation	ORP		Permanent		Yes	No	Yes	Paper	State of Iowa	File Room
Certificate of Exemption	ORP		Permanent		Yes	No	Yes	Paper	State of Iowa	File Room
Bylaws	ORP		Permanent		Yes	No	Yes	Paper	State of Iowa	File Room
ORP Board Minutes	ORP		CY + 10 years		Yes	No	Yes	Paper/PC	ORP Board of Directors	File Room
Audits	ORP		CY + 10 years		Yes	No	Yes	Paper	External Auditors	File Room
Office Correspondence of Official Nature	ORP	3 years	Pertinent documents		Yes	No	No	Paper/PC	No	File Room
Other Correspondence	ORP		CY + 5 years		Yes	No	No	Paper/PC	No	File Room
UI Statements of Accounts	ORP		CY + 3 years		No	No	No	Paper	UI Accounting Service	File Room
Requisition to and from a Department	ORP		CY + 3 years		No	No	No	Paper	Dept. providing product/service	File Room
Inventory/Assets	ORP		CY + 3 years		No	No	No	Paper	Property Management	File Room
Maintenance Agreements	ORP		CY + 3 years		No	No	No	Paper	Purchasing	File Room
All Payroll Files (includes Staff Benefits)	ORP		CY + 3 years		No	Yes**	No	Paper	Human Resources	File Room
Position Reclassifications (not forwarded to central HR administration)	ORP		CY + 3 years		Yes	Yes	No	Paper/PC	VP Research	File Room
Budgets	ORP		CY + 3 years		Yes	No	No	Paper/PC	VP Research	File Room
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.										