

## Records Retention Schedule--Office of the Ombudsperson

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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)										
Statement of Account	Accounting		CY + 2		no	no	no	paper	yes-- Accounting	locked file cabinet
Travel Vouchers	Travel		CY + 3		no	no	no	paper	yes--Travel	locked file cabinet
Voucher & Invoice--all	Accts Payable		CY + 3		no	no	no	paper	yes--Accts Payable	locked file cabinet
Statistics	Ombuds Office				yes	yes	yes	some paper some disk	no	locked file cabinet/backups
<b>Notes:</b>										
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.										

