Records Retention Schedule Template Ophthalmology and Visual Sciences Larry McGranahan 356-2866											
		LEGAL ACTIVE	NON-				RECORD	ELSEWHERE?			
			ACTIVE				FORMAT		CURRENTLY		
(CY: Current Yr)									IN PLACE?		
Backup documentation for	Cept										
CV's, purchases, etc.	Administration	CY + 1		Yes	No	No	Paper	Yes			
	Dept										
Budgets	Administration	CY	6 Yrs	Yes	No	No	Paper + PC	Yes			
	Dept		2 yrs past								
Contracts	Administration	CY	expiration	Yes	No	No	Paper	No			
	Dept										
Faculty Meeting Minutes	Administration	Indefinitely		Yes	Yes	No	Paper + PC	No	Locked office		
	Grant		3 yrs past				_				
Grant Awards	Administration	CY	end date	No	No	No	Paper	Yes			
							_				
Maintenance Agreements	Purchasing	CY + 2		No	No	No	Paper	Yes			
	Dept						_				
Payroll files	Administration	CY + 4		No	Yes	No	Paper	Yes	Locked Cabinet		
	Dept		3 yrs post-				_				
Personnel files	Administration	Indefinitely	term	Yes	Yes	Yes	Paper	No	Locked Cabinet		
	Dept						_				
Personnel Search Materials	Administration	CY + 15		Yes	No	No	Paper	No			
	Voucher										
	Processing										
Procurement Card Reports	Team	CY + 1		No	Yes	No	Paper	Yes	Locked Cabinet		
							_				
Promotion & Tenure	College	Indefinitely		No	Yes	No	Paper	Yes	Locked Cabinet		
							_				
Purchase Orders	Purchasing	CY + 1		No	No	No	Paper	Yes			
	Dept						_				
Requisitions	Administration	CY + 1		Yes	No	No	Paper	Yes			
	Accounting						_				
Statements of Account	Services	CY + 4		No	No	No	Paper	Yes			
		201									
Travel Vouchers	Travel	CY + 2		No	No	No	Paper	Yes			
Voucher & Invoices	Dept										
<\$10,000	Administration	CY + 1		Yes	No	No	Paper	Yes			
Vouchers & Invoices	Accounts	0)/ 2									
>\$10,000	Payable	CY + 2		No	No	No	Paper	Yes			
Office Correspondence of								0 "			
an Official Nature	Individual	Indefinitely		Yes	Yes	No	Paper	Sometimes	Locked office		

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DESCRIPTION	CUSTODIAN	RETENTION	REQUIREMEN	NTS (yrs.)	OFFICIAL?	CONFID.?	VITAL?	CURRENT	DUPLICATED	SAFEGUARD
		LEGAL	ACTIVE	NON-				RECORD	ELSEWHERE?	MEASURES
				ACTIVE				FORMAT		CURRENTLY
		(CY: Current Yr)								IN PLACE?
Notes:										
The retention period for	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.										nal.
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.										ed.
Medical, student and						-				
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.										
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