

Records Retention Schedule Template										
		DIVISION OF PERFORMING ARTS JANNA WESSELS 5-1615								
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)								
Academic Files	Undergrad-dept Registrar		cy + 5		no	yes	no	paper	yes	locked files
Academic Files	Admissions Grad-Grad College Registrar		cy + 5		no	yes	no	paper	yes	locked files
Personnel Files	Depts or CLA		7 yrs after termination		no	yes	no	paper	yes CLA	locked files
Payroll Files	Human Resources		cy + 3		no	yes	no	paper electronic	yes	yes-by-custodian
Statement of Accounts (SOA)`	Accounting Services		cy + 2		no	no	no	paper electronic	yes	yes-Accting Serv Microfiche
Equipment Inventory/Assets	Property Management		cy + 3		no	no	no	paper		yes-by-custodian
Contracts	Univ. Business Manager		term of K plus 3 yrs		not unless delegated by Bus Mgr	no	no	paper	yes	yes-by-custodian
Search Files orf various staff	Kellie Kucera Dnise Matthes Kathy Forbes		cy + 3		yes	yes	no	paper	Affirm Action Provost	locked file cabinets
Vouchers			cy + 3		no	no	no	paper	yes	no
Budgets	CLA/Div		cy + 3		no	no	no	paper	yes	no
Faculty Meeting Minutes	Depts		Indefinitely		yes	yes	no	paper	no	
Office Correspondence of an Official Nature	Depts		Indefinitely		yes	no	no	paper electronic	no	files backup on PC
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.										