

**PHYSICIAN ASSISTANT PROGRAM  
RECORDS RETENTION SCHEDULE**

**2001 - 2002**

Janet Steenlage 5-8921

DESCRIPTION	CUSTODIAN	RETENTION REQUIREMENTS (YRS)			OFFICIAL?	CONFID?	VITAL?	CURRENT RECORD FORMAT	DUPLICATED ELSEWHERE?	SAFEGUARD MEASURES CURRENTLY IN PLACE?
		LEGAL	ACTIVE (CY: CURRENT YR)	NON-ACTIVE						
Affiliation Agreements for Clinical Sites	D. Asprey		Life of Agreement + 2		Yes	No	Yes	Paper	At Affiliation Site	Locked Files
Applications for Admission	D. Asprey		Active Session + 2		Yes	Yes	No	Paper	Partially	Locked Files
Clinical Preceptor Info. Sheets	D. Asprey	Yes	Indefinite		Yes	Yes	Yes	Paper	No	Locked Files
Clinical Rotation Correspondence/ Information	D. Asprey		Active Session + 3		Yes	Yes	Yes	Paper	Partially	Locked Files
Office Correspondence	D. Asprey		Current + 8		Yes	Yes	Yes	Paper	Partially	Locked Files
Performance Evaluations	D. Asprey		Indefinite		No	Yes	Yes	Paper	No	Locked Files
Promotions Committee Minutes	D. Asprey		Current + 8		No	Yes	Yes	Paper	No	Locked Files
Staff Minutes	D. Asprey		Current + 8		No	No	No	Paper	No	Locked Files
Student Files	D. Asprey	Yes	Indefinite		Yes	Yes	Yes	Paper	Partially	Locked Files
Student Performance Records	D. Asprey	Yes	Indefinite		No	Yes	Yes	Paper	No	Locked Files

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" 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.