President's Office Records Retention Schedule											
(Contact person: Lucille Heitman; 5-3551)											
DESCRIPTION	CUSTODIAN	RETENTION R		ΓS (yrs.)	OFFICIAL?	CONFID.?	VITAL?	CURRENT	DUPLICATED	SAFEGUARD	
		LEGAL	ACTIVE	NON-				RECORD	ELSEWHERE?	MEASURES	
				ACTIVE				FORMAT		CURRENTLY	
		(	CY: Current Y	r)						IN PLACE?	
	I			T		1					
Backup documentation for cv's, deposits, purchases, receiving documents, etc.)	President's Office	CY + 3	CY + 3		Yes	Yes	No	Paper, PC	No	Stored in non-public area; office suite is locked during non- business hours	
Boards, committees external to UI	President's Office	NA	As needed		Yes	Yes	No	Paper	Yes	Same as above	
	President's	State-3	0)/ 0					D DO			
Budgets	Office	Federal-3	CY + 3		Yes	No	No	Paper, PC	Yes	Same as above	
	General										
Contracts	Counsel's office	NA	CY + 3		No	Yes	Yes	Paper, PC	Contractor	Same as above	
Correspondence-											
acknowledgements,	President's	State-3	Current in	Perm-				_			
congratulations, etc.	Office	Federal-3	office suite	anent	Yes	No	No	Paper	No	Same as above	
Inventory/Assets	Property Mngt. Office	State-3 Federal-3	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
Personnel files	President's Office	CY + 3 after termination	CY + 3 after termination		Yes	Yes	No	Paper	No	Same as above	
President's speeches	President's Office	State-3 Federal-3	Current in office suite	Perm- anent	Yes	No	No	Paper	Yes	Same as above	
Procurement Card Information & Reports	Voucher Processing Team	NA	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
Purchase Orders	Purchasing	NA	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
Requisitions to a Dept. (requesting product/service)	Dept. providing product/service	Until product/service is received	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
Requisitions (thru Purchasing)  Service contracts, maintenance	Purchasing President's	NA	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
agreements	Office	NA	CY + 3		Yes	No	No	Paper, PC	Some yes	Same as above	

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CUSTODIAN	RETENTION	REQUIREMENT	ΓS (yrs.)	OFFICIAL?	CONFID.?	VITAL?	CURRENT	DUPLICATED	SAFEGUARD	
	LEGAL	ACTIVE	NON-				RECORD	ELSEWHERE?	MEASURES	
							FORMAT		CURRENTLY	
		(CY: Current Yr	•)						IN PLACE?	
0										
	CV L 2	CV . 2		No	Voc	No	Donor	Voo	Same as above	
search	C1 + 3	C1+3		INO	res	NO	Paper	res	Same as above	
Accounting										
•	NA	CY + 3		No	No	No	Paper	Yes	Same as above	
		Current in	Perm-							
Provost's Office	NA	office suite	anent	No	No	No	Paper	Yes	Same as above	
T	NIA	01/ . 0		NI.	NI.	NI-	D DO		0	
i ravei	NA	CY + 3		NO	NO	NO	Paper, PC	Yes	Same as above	
Describeration	01-1-0	0								
				Voo	Voc	No	Donor	Voo	Same as above	
Office	reuerai-3	office suite		162	res	INU	Papei	162	Same as above	
Procident's	State 2	Current in	Dorm							
			-	Voc	Vec	No	Paner	No	Same as above	
Office	i euerai-3	Office Suite	aneni	163	163	NO	rapei	INO	Same as above	
President's	State-3	Current in	Perm-							
				Yes	Yes	No	Paper	Yes	Same as above	
011100	1 odorar o	omeo cano	arioni			110	i apoi	100	Carrio do abovo	
A/P	NA	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
President's	State-3									
Office	Federal-3	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
A/P	NA	CY + 3		No	No	No	Paper, PC	Yes	Same as above	
		Pertinent info.								
President's	State-3	kept								
Office	Federal-3	permanently		Yes	Yes	No	Paper	Some yes	Same as above	
	College or unit performing the search  Accounting Services  Provost's Office  Travel  President's Office  President's Office  A/P  President's Office  A/P	CUSTODIAN RETENTION LEGAL  College or unit performing the search CY + 3  Accounting Services NA  Provost's Office NA  Travel NA  President's State-3 Federal-3  President's State-3 Federal-3  President's State-3 Federal-3  President's State-3 Federal-3  A/P NA  President's State-3 Federal-3  A/P NA	CUSTODIAN RETENTION REQUIREMENT LEGAL ACTIVE  (CY: Current Yr  College or unit performing the search CY + 3  Accounting Services NA CY + 3  Provost's Office NA CY + 3  President's State-3 Current in office suite  A/P NA CY + 3  President's State-3 Current in office suite  A/P NA CY + 3  President's State-3 CY + 3	CUSTODIAN RETENTION REQUIREMENTS (yrs.)  LEGAL ACTIVE NON- ACTIVE  (CY: Current Yr)  College or unit performing the search CY + 3 CY + 3  Accounting Services NA CY + 3  Provost's Office NA CY + 3  President's Office Federal-3 Current in office suite  President's Office Federal-3 Current in office suite  President's State-3 Current in office suite  A/P NA CY + 3  President's State-3 Current in office suite  A/P NA CY + 3  President's State-3 CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3  President's State-3 CY + 3  A/P NA CY + 3	CUSTODIAN RETENTION REQUIREMENTS (yrs.) OFFICIAL?  LEGAL ACTIVE NON- ACTIVE  (CY: Current Yr)  College or unit performing the search CY+3 CY+3 No  Accounting Services NA CY+3 No  Travel NA CY+3 No  President's Office State-3 Federal-3 Office suite Office Office Office Office Office Office Suite Office	CUSTODIAN RETENTION REQUIREMENTS (yrs.) OFFICIAL? CONFID.?  LEGAL ACTIVE NON- ACTIVE  (CY: Current Yr)  College or unit performing the search CY + 3 CY + 3 No No President's Office Pederal-3 Office suite ACTIVE  President's Office Pederal-3 Office suite ACTIVE  Current in Office suite ACTIVE  Current in Office Suite ACTIVE  NO NO  Current in Office Suite ACTIVE  NO NO  NO  Current in Office Suite ACTIVE  NO NO  NO  Persident's Office Pederal-3 Office Suite ACTIVE  Office Pederal-3 Office Suite ACTIVE  ACTIVE  NO NO  NO  NO  NO  NO  President's Office ACTIVE  CY + 3 NO NO  NO  President's Office ACTIVE  A/P NA CY + 3 NO  NO  NO  President's State-3 Current in Office Suite ACTIVE  A/P NA CY + 3 NO  NO  NO  President's Office Federal-3 Office Suite ACTIVE  A/P NA CY + 3 NO  NO  NO  President's State-3 Current in Office Suite ACTIVE  A/P NA CY + 3 NO  NO  NO  President's Office Federal-3 CY + 3 NO  NO  NO  President's Office Pederal-3 CY + 3 NO  NO  President's State-3 CY + 3 NO  NO  President's Office Pederal-3 CY + 3 NO  NO  President's State-3 CY + 3 NO  President's Office Pederal-3 CY + 3 NO  NO  President's State-3 CY + 3 NO  President's State-3 CY + 3 NO  NO  President's State-3 CY + 3	Contact person: Lucille Heitman; 5-3551	Contact person: Lucille Heitman; 5-3551	COSTODIAN   RETENTION REQUIREMENTS (yrs.)   OFFICIAL?   CONFID.?   VITAL?   CURRENT   RECORD   ELSEWHERE?   FORMAT   CUTTON   FORMAT   F	

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		LEGAL	ACTIVE	NON-				RECORD	ELSEWHERE?	MEASURES	
				ACTIVE	,			FORMAT		CURRENTLY	
		(	(CY: Current Y	r)						IN PLACE?	
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 the UI 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.											

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