

Sponsored Programs Records Retention Schedule

(Contact person: Twila Reighley 5-2123)

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)								
Backup documentation for cv's, deposits, purchases, receiving documents, etc.)	Sponsored Programs	CY + 3	CY + 5		Yes	No	No	Paper/PC	No	Secured file room
Budgets	Sponsored Programs	State-3 Federal-3	CY + 5		Yes	No	No	Paper/PC	Budget Office	Secured file room
Confidential Disclosure Agreements	Sponsored Programs	Life of the agreement plus 2 years	Permanent		Yes	Yes	No	Paper, PC, Web	Agency	Secured file room
Grant & Contract Files & Records (pre-award)	Sponsored Programs	State-3 Federal-3	5 yrs past the end date		Yes	No	No	Paper, PC, Web	PI, Grant Acct.	Secured file room; computer files backed up nightly.
Material Transfer agreements (incoming)	Sponsored Programs	Life of the agreement plus 2 years	Permanent		Yes	Yes	No	Paper/PC	Agency	Secured file room
All Payroll files (includes Staff Benefits)	Human Resources	NA	CY + 5		No	Yes	No	Paper/PC	Payroll	Secured file room
Procurement Card Information & Reports	Voucher Processing Team	CY + 3	CY + 5		No	No	No	Paper/PC	VPT	Secured file room
Purchase Orders	Purchasing	NA	CY + 5		No	No	No	Paper/PC	Purchasing	Secured file room
Requisitions to a Dept. (requesting product/service)	Dept. providing product/service	Until product/service is received	CY + 5		No	No	No	Paper/PC	Dept. providing product/service	Secured file room
Requisitions (thru Purchasing)	Purchasing	NA	CY + 5		No	No	No	Paper/PC	Purchasing	Secured file room
Search Materials (related to filling a vacancy)	Sponsored Programs	CY + 3	CY + 5		Yes	Yes	No	Paper/PC	Affirm Action has some	Secured file room
Statement of Account (SOA)	Accounting Services	NA	CY + 5		No	No	No	Paper/PC	Accounting Services	Secured file room
Teaming, Master agreements	Sponsored Programs	Life of the agreement plus 2 years	5 yrs past the end date		Yes	No	No	Paper, PC	Agency	Secured file room
Travel Vouchers	Travel	NA	CY + 5		No	No	No	Paper/PC	Travel	Secured file room

