

## Records Retention Schedule Template

University of Iowa Press Holly Carver 4/2/01										
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)
User Manuals, Equipment Information	UI Press	No	permanent		no	no	yes	paper	no	n/a
expenses: vouchers, invoices	A/P	No	permanent		no	no	yes	paper	no	n/a
Income, vouchers	A/P	no	permanent		no	no	yes	papeer	yes	n/a
Change vouchers	A/P	no	permanent		no	no	yes	paper	yes	n/a
Personnel Record	USB	no	permanent		no	yes	yes	paper	yes	n/a
General Office Correspondence	UIP	no	permanent		no	yes	yes	paper	no	n/a
Electronic Files of books	G&S	no	permanent		no	no	yes	DC	no	typesetter back-up
Contracts	UI Press	yes	permanent		yes	yes	yes	paper	no	fireproof safe
Copyright	UI Press	yes	permanent		yes	no	yes	paper	no	fireproof safe
Office Correspondence of an Official Nature										
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 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.										