

Records Retention Schedule University Life Centers

David Grady 5-3114

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)							
MARKETING										
Budgets	Mkt Dept		CY+3		Yes	No	No	Excel	IMU Busi Off	File Cab & LAN
GUEST & EVENT SERVICES										
Budgets	Event Serv Dept		CY + 3		Yes	No	No	Excel	IMU Bus Off	File Cab & LAN
Procurement Card Records	Event Serv Dept		CY + 3		Yes	No	No	Excel		File Cab & LAN
Reqs to a Dept	Event Serv Dept		CY + 3		Yes	No	No			File Cabinet
Reqs From a Dept	Event Serv Dept		CY + 3		Yes	No	No			File Cabinet
HUMAN RESOURCES										
Backup Documentation for cv's, deposits, & purchases	HR Dept		CY + 3		Yes	No	No			File Cabinet
Maintenance Agreements	HR Dept		Life of Item		No	No	No			File Cabinet
Payroll Files	HR Dept		Permenant on Paper		No	Yes	No			File Cab & LAN
Position Reclassification	HR Dept		CY + 3		Yes	Yes	No			File Cabinet
Procurement Card Reports	HR Dept		CY + 3		No	Yes	No			File Cab & LAN
Reqs to a Dept	HR Dept		CY + 3		No	No	No			File Cabinet
Reqs thru Purchasing	HR Dept		CY on web		No	No	No			File Cabinet
Search Materials to fill vacancy	HR Dept		CY + 3		Yes	Yes	No			File Cabinet
Travel Vouchers	HR Dept		CY + 3		Yes	Yes	No			File Cab & LAN
Vouchers & Invoices (before 1/1/98)	HR Dept		CY + 3		Yes	Yes	No			File Cabinet

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		LEGAL	ACTIVE	NON-ACTIVE						
(CY: Current Yr)										
INFORMATION SYSTEMS			Life of Agreement + 2							
Licensing Agreements	IS Dept					No				File Cabinet
Backup Documentation for Purchases	IS Dept		CY + 3		Yes	No	No			File Cabinet
Budgets	IS Dept		CY + 3		Yes	No	No	Excel	IMU Bus Off	File Cab & LAN
Inventory/Assets	IS Dept		CY + 5		No	No	No			File Cab & LAN
Maintenance agreements	IS Dept		Life of Item		No	No	No			File Cabinet
Reqs to a Dept	IS Dept		CY + 3		No	No	No			File Cabinet
SOA	IS Dept		CY on web		No	No	No			File Cab & LAN
UNIVERSITY BOOKSTORE										
Backup Docum for cv's & purchases	Bookstore		CY + 3		Yes	No	No			File Cab & LAN
Inventory/Assets	Bookstore		CY + 5		No	No	No			File Cab & LAN
Maintenance agreements	Bookstore		Life of Item		No	No	No			File Cabinet
Purchase Orders	Bookstore		C Y + 3		No	No	No			File Cabinet
Reqs to a Dept	Bookstore		CY + 3		No	No	No			File Cabinet
Reqs thru Purchasing	Bookstore		CY on web		No	No	No			File Cabinet
SOA	Bookstore		CY on web		No	No	No			File Cab & LAN
Travel Vouchers	Bookstore		CY + 3		No	No	No			File Cab & LAN
Vouchers & Invoices (before 1/1/98)	Bookstore		CY + 6		No	No	No			File Cabinet
Vouchers & Invoices < 10,000(after 1/1/98)	Bookstore		CY + 3		Yes	No	No			File Cabinet
Vouchers & Invoices > 10,000(after 1/1/98)	Bookstore		CY + 3		No	No	No			File Cabinet

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		LEGAL	ACTIVE	NON-ACTIVE						
			(CY: Current Yr)							
BUILDING OPERATIONS										
Budgets	IMU Bus Off		CY + 3		Yes	No	No	Excel	IMU Bus Off	File Cab & LAN
Maintenance Agreements	IMU Bus Off		CY + 3		No	No	No			File Cabinet
Position Reclassifications	IMU Bus Off		CY + 3		Yes	Yes	No			File Cabinet
Purchase Orders	IMU Bus Off		CY + 3		No	No	No			File Cabinet
Requistions from Dept	IMU Bus Off		CY + 3		Yes	No	No			File Cabinet
Requistions thru Purchasing	IMU Bus Off		CY + 3		No	No	No			File Cabinet
SOA	IMU Bus Off		CY + 2		No	No	No			File Cab & LAN
Vouchers & Invoices < 10,000(after 1/1/98)	IMU Bus Off		CY + 3		Yes	No	No			File Cabinet
Vouchers & Invoices > 10,000(after 1/1/98)	IMU Bus Off		CY + 3		No	No	No			File Cabinet
CAMPUS INFORMATION CENTER										
Backup Docum for cv's & purchases	CIC		CY + 3		Yes	No	No			File Cabinet
IOWA HOUSE HOTEL										
Backup Docum for cv's & purchases	Iowa House		CY + 3		Yes	No	No			File Cabinet
Budgets	Iowa House		CY + 3		Yes	No	No	Excel	IMU Bus Off	File Cab & LAN
Pocurement Card Reports	Iowa House		CY + 3		No	Yes	No			File Cab & LAN
Requistions from Dept	Iowa House		CY + 3		Yes	No	No			File Cabinet
SOA	Iowa House		CY + 2		No	No	No			File Cab & LAN

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		LEGAL	ACTIVE	NON-ACTIVE						
			(CY: Current Yr)							
Travel Vouchers	Iowa House		CY + 3		No	No	No			File Cab & LAN
Vouchers & Invoices (before 1/1/98)	Iowa House		CY + 3		No	No	No			File Cabinet
Vouchers & Invoices < 10,000(after 1/1/98)	Iowa House		CY + 3		Yes	No	No			File Cabinet
Guest Registration Cards	Iowa House		CY + 5		No	Yes	No			File Cabinet
IMU BUSINESS OFFICE										
Backup Docum for cv's & purchases	IMU Bus Off		CY + 3		Yes	No	No			File Cabinet
Budgets	IMU Bus Off		CY + 3		Yes	No	No	Excel	IMU Bus Off	File Cab & LAN
Contracts	IMU Bus Off		CY + 10 after contract		No	No	No			File Cabinet
Inventory/Assets	IMU Bus Off		CY + 3		No	No	No			File Cab & LAN
Maintenance Agreement	IMU Bus Off		CY + 3		No	No	No			File Cabinet
Procurement Card Reports	IMU Bus Off		CY + 3		No	Yes	No			File Cab & LAN
Purchase Orders	IMU Bus Off		CY + 3		No	No	No			File Cabinet
Reqs to Depts	IMU Bus Off		CY + 3		No	No	No			File Cabinet
Reqs from Depts	IMU Bus Off		CY + 3		Yes	No	No			File Cabinet
Reqs thru purchasing	IMU Bus Off		CY + 3		No	No	No			File Cabinet
SOA	IMU Bus Off		CY + 3		No	No	No			File Cab & LAN
Vouchers & Invoices (before 1/1/98)	IMU Bus Off		CY + 3		No	No	No			File Cabinet
Vouchers & Invoices < 10,000(after 1/1/98)	IMU Bus Off		CY + 3		Yes	No	No			File Cabinet
Vouchers & Invoices > 10,000(after 1/1/98)	IMU Bus Off		CY + 3		No	No	No			File Cabinet

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		LEGAL	ACTIVE	NON-ACTIVE						
			(CY: Current Yr)							
OSL BUSINESS OFFICE										
Backup Docum for cv's & purchases	OSL Bus Off		CY + 3		Yes	No	No			File Cabinet
Budgets	OSL Bus Off		CY + 3		Yes	No	No	Excel	IMU Bus Off	File Cab & LAN
Contracts	OSL Bus Off		CY + 10 after contract		No	No	No			File Cabinet
Inventory/Assets	OSL Bus Off		CY + 3		No	No	No			File Cab & LAN
Maintenance Agreement	OSL Bus Off		CY + 3		No	No	No			File Cabinet
Procurement Card Reports	OSL Bus Off		CY + 3		No	Yes	No			File Cab & LAN
Purchase Orders	OSL Bus Off		CY + 3		No	No	No			File Cabinet
Reqs to Depts	OSL Bus Off		CY + 3		No	No	No			File Cabinet
Reqs from Depts	OSL Bus Off		CY + 3		Yes	No	No			File Cabinet
Reqs thru purchasing	OSL Bus Off		CY + 3		No	No	No			File Cabinet
SOA	OSL Bus Off		CY + 3		No	No	No			File Cab & LAN
Vouchers & Invoices (before 1/1/98)	OSL Bus Off		CY + 3		No	No	No			File Cabinet
Vouchers & Invoices < 10,000(after 1/1/98)	OSL Bus Off		CY + 3		Yes	No	No			File Cabinet
Vouchers & Invoices > 10,000(after 1/1/98)	OSL Bus Off		CY + 3		No	No	No			File Cabinet
UNIVERSITY BOX OFFICE										
Backup Docum for cv's & purchases	UBO		CY + 3		Yes	No	No			File Cabinet
Budgets	UBO		CY + 3		Yes	No	No	Excel	IMU Bus Off	File Cab & LAN
Contracts	UBO		CY + 10 after contract		No	No	No			File Cabinet
Purchase Orders	UBO		CY + 3		No	No	No			File Cabinet

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		LEGAL	ACTIVE	NON-ACTIVE						
			(CY: Current Yr)							
Reqs to Depts	UBO		CY + 3		No	No	No			File Cabinet
Reqs from Depts	UBO		CY + 3		Yes	No	No			File Cabinet
Reqs thru purchasing	UBO		CY + 3		No	No	No			File Cabinet
SOA	UBO		CY + 3		No	No	No			File Cab & LAN
Vouchers & Invoices (before 1/1/98)	UBO		CY + 3		No	No	No			File Cabinet
Vouchers & Invoices < 10,000(after 1/1/98)	UBO		CY + 3		Yes	No	No			File Cabinet
Vouchers & Invoices > 10,000(after 1/1/98)	UBO		CY + 3		No	No	No			File Cabinet
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.										