

| Urban & Regional Planning Records Retention Schedule -Contact Person: Pam Butler 5-0033 | | | | | | | | | | |
|---|--------------------------------|--------------------------------------|-------------------------------------|------------|-----------|----------|--------|-----------------------|---------------------|--|
| DESCRIPTION | CUSTODIAN | RETENTION REQUIREMENTS (yrs.) | | | OFFICIAL? | CONFID.? | VITAL? | CURRENT RECORD FORMAT | APPLICATIONS/REVIEW | SAFEGUARD MEASURES CURRENTLY IN PLACE? |
| | | LEGAL | ACTIVE | NON-ACTIVE | | | | | | |
| (CY: Current Yr) | | | | | | | | | | |
| Agency/Organization Affiliations | URP | CY +3 | CY +3 | | Yes | No | No | Paper | No | Stored in locked files & office during non-business hours. |
| Backup documentation for CV's, deposits, services | URP | CY + 3 | CY +3 | | Yes | No | No | Paper | Yes | Same as above |
| Course Materials-Syllabi, etc. | URP | CY +3 | CY +3 | 10+ years | Yes | No | No | Paper/PC | No | Same as above +Computer back-up |
| Faculty/Staff Personnel Files | URP | 3 years after termination | 3 years after termination | | Yes | Yes | No | Paper | No | Stored in locked files & office during non-business hours. |
| Faculty/Staff Search Materials | URP | CY +3 | CY +3 | | Yes | Yes | No | Paper | No | Same as above |
| Fiscal Budget Materials | Grad College | | CY +3 | | No | No | No | Paper | Yes | Same as above |
| Grant Proposals | Grant Accounting | | CY +3 years after award has expired | | No | No | No | Paper | Yes | Same as above |
| Inventory & Assests | Property Management Office | | CY +3 | | No | No | No | Paper | Yes | Same as above |
| Maintenance Agreements | Purchasing Department | | CY +3 | | No | No | No | Paper | Yes | Same as above |
| Non PO Vouchers & Invoices | Receiving Dept | | CY +3 | | No | No | No | Paper | Yes | Same as above |
| Office Correspondence of an Official Nature | URP | CY +3 | CY +3 | | Yes | No | No | Paper/PC | No | Same as above + Computer back-up |
| Payroll Records | Human Resources | | CY +3 | | No | Yes | No | Paper | Yes | Stored in locked files & office during non-business hours. |
| Procurement Card Records | Voucher Processing Team | | CY +3 | | No | Yes | No | Paper | Yes | Same as above |
| Promotion & Tenure | URP | CY +7 after employee terminates | CY +7 after termination | | Yes | Yes | No | Paper/PC | Yes | Same as above + Computer backup |
| Requisitions through Purchasing | Purchasing | | CY +3 | | No | No | No | Paper | Yes | Stored in locked files & office during non-business hours. |
| Requisitions to a Department | Dept Providing Service/Product | Until Product or Service is Received | CY +3 | | No | No | No | Paper | Yes | Same as above |
| Statement of Accounts | Accounting Services | | CY +3 | | No | No | No | Paper | Yes | Same as above |
| Student Academic Records | Registrar | | CY +3 | 10 Years | No | Yes | No | Paper | Yes | Same as above |

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| | | LEGAL | ACTIVE | NON-ACTIVE | | | | | | |
| | | (CY: Current Yr) | | | | | | | | |
| Student Admiss. Records | Office of Admissions | | CY +3 | 10 Years | No | Yes | No | Paper | Yes | Same as above |
| Student RA/TA Personnel Files | URP | 3 years after termination | 3 years after termination | | Yes | Yes | No | Paper | No | Same as above |
| Student Recruitment Correspondence/Records | URP | CY +3 | CY +3 | 10 Years | Yes | Yes | No | Paper/PC | No | Same as above + Computer backup |
| Travel Expense Vouchers | Travel | | CY +3 | | No | No | No | Paper | Yes | Stored in locked files & office during non-business hours. |
| 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. | | | | | | | | | | |