

Records Retention Schedule Template

University Video Center- Dan Lind 5-2645										
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.	Video Center	CY + 3	CY + 3		No	No	No	Paper	No	Secured file
Billings and Accounts Receivable	Business Office	CY + 3	CY + 3		No	No	No	Paper	Yes	Ui computer backup
Budgets	Dean's Office	CY + 3	CY + 5		No	No	No	Paper	Yes	Secured file
Contracts	Business Office	CY + 10 after contract has expired	Permanent		No	Some may have non-disclosure	Yes	Paper	Yes	Secured file
Inventory	Property Management Office	N/A	CY + 3		No	No	No	Paper	Yes	UI computer backup
Payroll files (includes Staff Benefits	Human Resources	N/A	CY + 3		No	Yes	No	Paper	Payroll	UI computer backup
Permissions, releases, use & performance agreemants	Video Center	Life of product	Permanent		Yes	No	No	Paper	No	Secured file
Personnel files	Video Center	N/A	Permanent		No	Yes	No	Paper	Yes	Secured file
Policies and procedures for Video Center	Video Center	N/A	Permanent		Yes	No	No	Paper/PC	Yes-UI-OM No-internal	Computer backup
Procurement Card Database & Reports	Voucher Processing Team	N/A	CY + 3		No	No	No	Paper	Yes	Secured file
Purchase Orders	Purchasing	N/A	CY + 3		No	No	No	Paper	Yes	UI Computer backup
Requisitions to a Dept. (requesting product/service	Dept. providing product/service	CY + 3	CY + 3		No	No	No	Paper	Yes	Computer backup
Requisitions from a Dept. for product/service	Video Center	CY + 3	CY + 3		Yes	No	No	Paper	Yes	Secured file
Requisitions (thru Purchasing)	Purchasing	N/A	CY + 3		No	No	No	Paper	Yes	Computer backup
Statement of Account (SOA)	Accounting Services	N/A	CY + 3		No	No	No	Paper	Yes	UI computer backup
Travel Vouchers	Travel	N/A	CY + 3		No	No	No	Paper	Yes	UI computer backup
Vouchers & Invoices	A/P	N/A	CY + 3		No	No	No	Paper	Yes	UI computer backup
Office Correspondence of an Official Nature	Video Center	N/A	Permanent		Yes	No	No	Paper	No	Computer backup

Effective Date: ?

3/8/01

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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.										