DESCRIPTION				WISE PROGRAM				Mary Schott 5-2141		
	CUSTODIAN	RETENTION	REQUIREMENT	ΓS (yrs.) OFFICIAL?		CONFID.?	VITAL?	CURRENT	DUPLICATED	
		LEGAL	ACTIVE	NON- ACTIVE				RECORD FORMAT	ELSEWHERE?	
Backup documentation for										
cv's, deposits, purchases,										
receiving documents, etc.	WISE Program		CY + 3		Yes	No	No	Paper	No	Locked office
		CY + 3 after	CY + 3 after							
Personnel Files	WISE Program	termination	termination		Yes	Yes	No	Paper	No	Locked office
Procurement Card										
information and reports	WISE Program	CY + 3	CY + 3		No	No	No	Paper	Yes	Locked office
Purchase Orders	Purchasing	CY + 3	CY + 3		No	No	No	Paper, PC	Yes	Locked office
	-	Until	Until							
Requisitions to a Dept.	Dept. providing	product/service	product/service							
(requesting product/service	product/service	is received	is received		No	No	No	Paper	Yes	Locked office
Requisitions (thru										
Purchasing)	Purchasing	CY + 3	CY + 3		No	No	No	Paper	Yes	Locked Office
Service contracts,										
maintenance agreements	WISE Program	CY + 3	CY + 3		Yes	No	No	Paper	Some yes	Locked office
	Accounting									
Statement of Account (SOA)	Services	CY + 3	CY + 3		No	No	No	Paper	Yes	Locked office
Travel Vouchers	Travel	CY + 3	CY + 3		No	No	No	Paper	Yes	Locked office
UI Foundation (various										
records)	WISE Program	CY + 3	CY + 3		Yes	Yes	No	Paper	Yes	Locked office
Voucher & Invoices	WISE Program	CY + 3	CY + 3		No	No	No	Paper	Yes	Locked office
		Kept	Kept							
Minutes of Advisory Board	WISE Program	permanently	permanently		No	No	No	Paper, PC	No	Locked office
Official Nature (Unit policies										
& procedures, misc		Kept	Kept							
information	WISE Program	permanently	permanently		Yes	Yes	No	Paper	Some yes	Locked office
Notes:										
1) The retention period for					equirement.					
2) The custodian has officia										

Records Retention Schedule Template											
				WISE PROGRAM				Mary Schott 5-2141			
DESCRIPTION	CUSTODIAN	RETENTION	REQUIREMENT	'S (yrs.)	OFFICIAL?	CONFID.?	VITAL?	CURRENT	DUPLICATED	SAFEGUARD	
		LEGAL	ACTIVE	NON-				RECORD	ELSEWHERE?	MEASURES	
				ACTIVE				FORMAT		CURRENTLY	
			(CY: Current Yr)							IN PLACE?	
					·						
Convenience copies are not official records.											
4) A "Confidential Record	d" is unavailable to t	he general public	unless otherwise	ordered b	by court, by th	e lawful cust	odian or by	another persor	n duly authorized.		
Medical, student and	personnel files are e	examples.									
5) A "Vital Record" is one	e which is absolutely	essential in orde	r to continue doir	ng busines	s or to prese	rve the rights	of the unit,	its employees	and the general pu	ıblic.	
6) "Office Correspondence	ce of an Official Nati	ure" refers to polic	cies, procedures,	reports (ir	ternal or exte	ernal), etc. the	at are used	in the administ	ration and manage	ement	
of the department	t and that should be	memorialized.									