

**Women's Resource and Action Center
Record Retention Plan**

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DESCRIPTION	LENGTH OF TIME RETAINED	OFFICIAL	DEPARTMENT COPY CONFIDENTIAL?	VITAL	CUSTODIAN
Backup documentation for cy's deposits, purchases, receiving documents	CY + 3yrs	Yes	No	No	Operations Coordinator
Budgets	CY + 3yrs	Yes	No	No	Operations Coordinator
Contracts	CY + 10 yrs after contact has expired	No unless Delegated	No	No unless delegated	Operations Coordinator
Counseling Files	CY + 7 yrs	Yes	Yes	Yes	Director
Financial Statements	CY + 3 yrs	Yes	Yes	Yes	Operations Coordinator
Gift & Grant Award	CY + 3 yrs after award has expired	No	No	No	Operations Coordinator
Group Confidential File	CY+ 3yrs	Yes	Yes	Yes	Director
Group Service Summaries	CY + 3 yrs	Yes	Yes	Yes	Director & Group Coordinator
Inventory/Assets	CY + 3yrs	No	No	No	Operations Coordinator
Maintenance Agreements	CY + 3 yrs	No	No	No	Operations Coordinator
Payroll files (including benefits)	CY + 3 yrs	No	Yes (some are not)	No	Operations Coordinator

Personnel, Grievance, Medical files	3 yrs after termination	Yes	Yes	No	Director
Position reclassifications	CY + 3 yrs	Yes	Yes	No	Operations Coordinator
Practicum Student Evaluations	3 yrs after termination of internship	Yes	Yes	No	Director
Purchase Orders	CY + 3	No	No	No	Operations Coordinator
Requisitions to a department (requesting product/service)	Until product/service received	No	No	No	Operations Coordinator

Requisitions to a department (providing product/services)	Cy + 3 yrs	Yes	No	No	Operations Coordinator
Requisitions (through Purchasing)	CY + 3 yrs	No	No	No	Operations Coordinator
Search Materials (filing vacancy)	CY + 3 yrs	Yes	Yes	No	Director
Statement of Account	CY + 3 yrs	No	No	No	Operations Coordinator
Travel Vouchers	CY + 3 yrs	No	No	No	Operations Coordinator
Vouchers & Invoices (before 1/1/1998)	CY + 3 yrs	No	No	No	Operations Coordinator
Vouchers & Invoices <\$10,000 (after 1998)	CY + 3 yrs	Yes	No	No	Operations Coordinator
Vouchers & Invoices >\$10,000	CY + 3 yrs	No	No	No	Operations Coordinator
Volunteer Records	CY + 3 yrs	Yes	Yes	No	Director