

Records Retention Schedule Template

Writer's Workshop Connie Brothers 5-0419

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)								
Statements of Accounts	Accounting Services		1 year	4 years	No	No	Yes	Paper	Yes	
U of I Foundation Accounts	U of I Foundation		1 year	4 years	No	Yes	Yes	Paper & Internet	Yes	
Financial Aid Awards	Writers' Workshop		2 years	1 year	Yes	No	Yes	Paper	No	Yes - PC
Payroll Records	Payroll		2 years	4 years	No	Yes	Yes	Paper	Yes	
Student Files	Writers' Workshop		2 years		Yes	Yes	Yes	Paper	No	Locked office
Faculty Files	Writers' Workshop		Continuing		Yes	Yes	Yes	Paper	No	
Purchase Orders & Requisitions	Writers' Workshop		1 year		Yes	No		Paper	No	
Travel Voucher	Writers' Workshop		1 year		Yes	No		Paper	Yes	
Faculty Searches	Writers' Workshop		1 year	20 years	Yes	Yes	Yes	Paper	No	
Alumni Records	Writers' Workshop			Continue	Yes	Yes	Yes	Paper	No	
Office Correspondence of an Official Nature	Writers' Workshop		2 years	5 years	Yes	Yes	Yes	Paper	Yes	PC
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.										