

## College of Education Records Retention Schedule

**(Contact person: Ann Farland: 5-5388)**

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.)	College of Education	CY + 3	CY + 3		Yes	No	No	Electronic & Paper	Yes	Computer backup
Budgets	College of Education	State-3 Federal-3	Permanent		Yes	No	No	Electronic & Paper	Yes-Budget Office	Computer backup
All Payroll files (includes Staff Benefits)	Human Resources	NA	CY + 3		No	Yes	No	Electronic & Paper	Yes	Computer backup
Policies and procedures for the college.	College of Education	State-3 Federal-3	Permanent		Yes	No	No	Electronic & Paper	No	Computer backup
Position reclassifications (not forwarded to central HR administration)	College of Education	CY + 3	CY + 3		Yes	Yes	No	Electronic & Paper	No	Computer backup
Promotion & Tenure (Includes Promotion record and dossier. Supplementary materials are optional.)	College of Education	CY + 7 after employee terminates	Permanent		Yes	Yes	Yes	Electronic & Paper	Yes	Computer backup
Purchase Orders	Purchasing	NA	CY + 3		No	No	No	Paper	Yes	
Requisitions to a Dept. (requesting product/service)	Dept. providing product/service	Until product/service is received	CY + 3		No	No	No	Paper	Yes	
Requisitions from a Dept. (providing product/service)	Dept. providing product/service	CY + 3	CY + 3		Yes	No	No	Paper		
Requisitions (thru Purchasing)	Purchasing	NA	CY + 3		No	No	No	Paper	Yes	
Search Materials (related to filling a vacancy)	College of Education	CY + 3	CY + 5		Yes	Yes	No	Paper	No	
Student Records-Educational Placement Office	College of Education	Undergrad: CY + 5 Grad: CY + 10	CY + 15		Yes	Yes	No	Paper	No	

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		(CY: Current Yr)								
Statement of Account (SOA)	Accounting Services	NA	CY + 3		No	No	No	Paper	Yes	
Travel Vouchers	Travel	NA	CY + 3		No	No	No	Paper	Yes	
Vouchers & Invoices < \$10,000 (after 1/1/98)	College of Education	State-3 Federal-3	CY + 3		Yes	No	No	Paper	Yes	
Vouchers & Invoices > \$10,000 (after 1/1/98)	A/P	NA	CY + 3		No	No	No	Paper	Yes	
Office Correspondence of an Official Nature	College of Education	State-3 Federal-3	Permanent		Yes	No	No	Paper	No	
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 the UI 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.										