

Records Retention Schedule for African American World Studies

(Contact Person: Karen Friedman, 5-0317)

| 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) | | | | | | | | |
| Financial Records/Statements | Dept. Sect. | | CY +3 yrs. | | Yes | Yes | Yes | Online, Paper | Yes | Locked Office |
| Foundation Acct. Summaries | Dept. Sect. | | CY + 3 yrs. | | No | Yes | Yes | Online, Paper | Yes | Locked Office |
| Purchase Orders | Dept. Sect. | | CY + 3 yrs. | | No | Yes | Yes | Paper | Yes | Locked Office |
| Procurement Card Vouchers | Dept. Sect. | | CY + 3 yrs. | | No | Yes | Yes | Paper | Yes | Locked Office |
| Blue Requisitions | Dept. Sect. | | CY + 3 yrs. | | No | No | Yes | Paper | Yes | Locked Office |
| Travel Vouchers | Dept. Sect. | | CY + 3 yrs. | | No | Yes | Yes | Paper | Yes | Locked Office |
| Voucher & Invoice | Dept. Sect. | | CY + 3 yrs. | | No | Yes | Yes | Paper | Partially | Locked Office |
| Student Files Past-Present-Future | Dept. Sect. | | Indefinitely | | Yes | Yes | Yes | Paper | Yes | Locked Office |
| All Class Lists | Dept. Sect. | | CY + 7 | | No | Yes | Yes | Paper | Yes | Locked Office |
| All Schedules/Course Offerings/Approvals | Dept. Sect. | | CY + 7 | | Yes | No | Yes | Paper/PC | Partially | Locked Office |
| Course Evaluations | Dept. Sect. | | CY + 7 | | Yes | Yes | Yes | Paper | No | Locked Office |
| Space Inventory | Dept. Sect. | | CY + 3 yrs. | | Yes | No | Yes | Paper | Yes | Locked Office |
| Equipment Inventory/Assets | Dept. Sect. | | CY + 3 | | No | No | Yes | Paper | Yes | Locked Office |
| Manuals for Office Equipment | Dept. Sect. | | for life of equipment | | Yes | No | No | Paper | No | Locked Office |
| Surveys & Reports | Dept. Sect. | | 5 yrs | | Yes/No | No | Yes | Paper/PC | Yes | Locked Office |
| Faculty Files | Dept. Sect. | | Current-Indefinite; Non-active, CY + 3 after departure | | Yes | Yes | Yes | Paper | Partially | Locked Office |

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|---|-------------|--|---|--|--------|-----|-----|--------------|-----------|---------------|
| Salary Reports/Payroll Docs | Dept. Sect. | | CY+3 | | No | Yes | Yes | Paper | Yes | Locked Office |
| HRIS Policies, Appt Forms | Dept. Sect. | | Indefinite | | No | Yes | Yes | Paper/PC | Yes | Locked Office |
| Faculty CVs | Dept. Sect. | | Current Version | | Yes | Yes | Yes | Paper | Yes | Locked Office |
| Faculty Search Materials | Dept. Sect. | | CY +3 | | Yes/No | Yes | Yes | Paper | Yes | Locked Office |
| P & T Files | Dept. Sect. | | Current-Indefinite; Non-active, 7 yrs after departure | | No | Yes | Yes | Paper | Partially | Locked Office |
| University Policies | Dept. Sect. | | Keep Current | | No | No | Yes | Paper/Online | Yes | Locked Office |
| Fac. Mtg. Agendas & Minutes | Dept. Sect. | | CY + 3 yrs. | | Yes | Yes | Yes | Paper | Yes | Locked Office |
| Dept. Bylaws | Dept. Sect. | | Undergoing Revision | | | | | | | |
| Reviews & Departmental Self Study | Dept. Sect. | | Current & Previous | | Yes | No | Yes | Paper | Yes | Locked Office |
| Strategic Plan | Dept. Sect. | | CY + 3 | | Yes | No | Yes | Paper | No | Locked Office |
| Office Correspondence of an Official Nature | Dept. Sect. | | CY + 3 | | Yes | Yes | Yes | Paper | Partially | Locked Office |
| 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 unit. | | | | | | | | | | |

