

Records Retention Schedule Template

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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)								
Budget	Emerg Med Administration		Permanent		Yes	No	Yes	Electronic & Paper	Yes	Locked Officc
Human Resources	Emerg Med Administration		Permanent		Yes	Yes	Yes	Paper	Yes	Locked Officc
Purchasing, Accounts Payable	Emerg Med Administration		CY + 4		No	No	No	Paper	Yes	Locked Officc
Statements of Account	Emerg Med Administration		CY + 3		No	No	No	Paper	Yes	Locked Officc
Disaster & Emergency Preparedness Manual	Emerg Med Administration		Permanent		Yes	No	Yes	Electronic & Paper	Yes	
Administrative Files	Emerg Med Administration		CY + 3		Yes	Yes	Yes	Electronic & Paper	Partially	Locked Officc
ETC Databases	Emerg Med Administration		CY + 5		No	Yes	Yes	Electronic & Paper	Partially	Locked Officc
Aircare Records	Emerg Med Administration		CY + 6		No	Yes	No	Paper	Partially	Locked Officc
Office Correspondence of an Official Nature										
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.										