**Commonly Found Records in Administrative Offices**

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| **Document:** | **Owner:** | **Retention Period:** | **Retention Period Begins:** |
| Meeting minutes and agendas:  Staff meetings  Official committee records (Committee Chair) | Department  Department that established committee | Until administrative use ceases  Permanent | N/A  Upon Creation |
| Financial records:  Campus budget  Departmental budget  Purchase 0rders and related documents  Payments  Procard records  Travel reimbursement  Cash receipts and deposit slips  Journal entries | VC for A&F  Department  Procurement  Controller  Department/Controller  Controller  Bursar  Controller | Primary copy: Permanent  Until administrative use ceases  6 years  12 years  12 years (kept by department for 2 years, then Controller for 10 years)  12 years  8 years  12 years | Upon creation  N/A  After payment  After payment  After payment  After payment/disbursement  Upon creation  Upon creation |
| Grant records:  Awarded  Unfunded  Research data and results | ORSP  ORSP  Department | 6 years  3 years  7 years | After last financial report  After submission  After grant expiration |
| Personnel records:  Personnel Files  PAs and related documents  Recruitment files  Time and attendance  Employee memos  Intern and volunteer  Recommendation Letters (for current and past employees) | Human Resources  Human Resources  Department/Human Resources  Human Resources  Human Resources  Department  Department | Permanent  Permanent  3 years (department keeps until HR calls for records)  6 years  Permanent (part of personnel file)  6 years  3 years | Upon separation  Upon creation  Upon closure or completion  Upon creation  Upon creation  Upon separation  Upon creation |
| Student records:  Grades  Exams and papers  Student Evaluations of Faculty  Masters Theses and Dissertations  Disability records | Registrar  Faculty/Department  Department  Department  Office of Diversity & Inclusion | Permanent  Qualifying exams for degree programs are permanent, all other tests and exams 1 year  6 years  Permanent  6 years | Upon Creation  End of semester  End of semester  End of semester  After graduation or separation |
| Schedules and calendars | Department | Until administrative use ceases | N/A |
| General correspondence and memos | Department | 3 years | Upon creation |
| Reference materials | Department | Until administrative use ceases | N/A |
| Official publications, brochures, and booklets created by the department | Creating department | Permanent or deposit into University Archives and Special Collections | Upon creation |
| Policy and procedure records:  Final policy and substantive support materials that add to understanding of the policy  All other materials | Vice Chancellor/Provost  Vice Chancellor/Provost | Permanent  3 years | Upon creation  After admin. use ceases |
| Program development and review records | Vice Chancellor/Provost | Substantive materials: Permanent | Upon creation |

* Departments are only responsible for retaining records for which they are the owner. All other records should be kept until administrative use ceases. If you have the original document, send it to the owner.
* All records containing Personally Identifiable Information (PII) **must** be shredded. PII is sensitive information identifying an individual person or campus business; examples include social security or other ID numbers; home address, phone number, or email address; photographs or fingerprints; credit card numbers or other financial information; and medical information. Records that contain no personal information may be recycled. **When in doubt, shred!**
* The archives is interested in reviewing all records before destruction except personnel, student, financial records, such as purchase orders, contracts, grants, payments, and procard records.