

Recommended Retention and Disposition Guidelines

PDF version - suitable for printing

Accreditations File

Content:

Records concerning office, department, center, or program accreditation. File may include correspondence, reports, questionnaires, guides, and other related records.

Status and Restrictions:

Ongoing; no restrictions for publicly released documents. Otherwise, Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Administrative File

Content:

Records concerning the administration of the office, department, center, or program. File may include reports, memoranda, correspondence, directives, and other records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Administrative Officer File

Content:

Records maintained by the administrative officer concerning programs and activities. File may include correspondence, memoranda, reports, directives, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Audit Reports File

Content:

Office, department, center, or program audit reports and related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Board of Trustees File

Content:

Board minutes, reports, and related materials.

Status and Restrictions:

Ongoing; Restricted for 50 years

Recommended Disposition:

a. Destroy minutes in office when administrative value ends.; b. Transfer materials generated by the office, department, center, or program to the custody of the Medical Center Archives after 7 years.

Board of Visitors File

Content:

Meeting records and related materials from various academic school boards.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Budgets File

Content:

Records concerning office, department, center, or program budget. File may include proposals, approved budgets, budget reports, requests for budget changes, budget authorizations, accounting information, breakdowns of allocations by line item, correspondence, reports, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Follow guidelines as outlined in GAP200:240; consult with Medical Center Archives for records not listed.

Calendars of Events File

Content:

Reference copies of university calendars of events.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Destroy in office when superseded or obsolete.

Class Schedules File

Content:

Record copies of department or program class schedules.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Committees and Councils File

Content:

Records concerning various committees and councils with which office, department, center, or program deals. File may include minutes of meetings, reports, notifications, correspondence, and other pertinent records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Conferences and Workshops Attended File

Content:

Records concerning conferences and workshops attended by office, department, center, or program personnel. File may include correspondence, agendas, programs, handouts, and other related records.

Status and Restrictions:

Ongoing

Recommended Disposition:

Destroy in office when reference value ends.

Conferences and Workshops Conducted File

Content:

Records concerning conferences and workshops conducted by the office, department, center, or program. File may include correspondence, agendas, programs, reports, training materials, handouts, reservations, critiques, questionnaires, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Contracts, Agreements, and Leases File

Content:

Contracts, agreements, and leases for services, facilities, and equipment used by office, department, center, or program.

Status and Restrictions:

Ongoing

Recommended Disposition:

Destroy in office 3 years after termination of agreement/contract if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

Correspondence File

Content:

Official office correspondence.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Course Listings File

Content:

Listings of courses currently offered by department or program.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Course Syllabi/Outlines File

Content:

Syllabus or outline of each course offered by department or program.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Course Title Directory File

Content:

Directory of courses currently offered by the department or program.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Departmental Programs File

Content:

Records concerning academic programs of the various departments within the office,

department, center, or program. File may include additions, changes, or deletions in existing programs.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Departmental Reports File

Content:

Record copies of departmental reports.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Faculty Awards and Honors File

Content:

Records concerning awards and honors to faculty members within the office, department, center, or program. File may include recommendations, approvals, and other related records.

Status and Restrictions:

Ongoing

Recommended Disposition:

a. Transfer records concerning each individual award/honor to appropriate individual's personnel file when award/honor becomes official.; b. Destroy in office remaining records after 10 years.

Faculty Listings File

Content:

Listings of office, department, center, or program faculty.

Status and Restrictions:

Ongoing; No restrictions

Recommended Disposition:

Transfer to the custody of the Medical Center Archives when reference value ends.

Faculty Publications File

Content:

Reference copies of articles and books written by departmental faculty members.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives when reference value ends.

Grants File

Content:

Records concerning grants awarded to and/or administered by office, department, center, or program. File may include administrative documents, reports, regulations and guidelines, correspondence, audits, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives when reference value ends.

Grants Proposals File

Content:

Proposals for office, department, center, or program grants.

Status and Restrictions:

Ongoing

Recommended Disposition:

Transfer to the custody of the Medical Center Archives when reference value ends.

History File

Content:

Records concerning the history of the office, department, center, or program. File may include publications, newsletters, reports, correspondence, photographs, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Destroy in office when reference value ends.

Honor Societies File

Content:

Records concerning the office, department, center, or program dealings with academic honor societies.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Master Courses File

Content:

Records concerning each course taught by office, department, center, or program faculty. File may include course schedule.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

New Course Proposals File

Content:

Records concerning each proposed new course. File may include course descriptions, justifications, projected schedules, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

News Media Clippings File

Content:

Reference copies of news media and magazine clippings concerning department.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Organizations and Associations File

Content:

Records concerning various faculty, student, and professional organizations and associations with which the office, department, center, or program deals. File may include correspondence, reports, publications, minutes, announcements, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

a. Transfer correspondence and reports after 5 to 7 years to the custody of the Medical Center Archives for appraisal and final disposition.; b. Destroy in office remaining records after 5 to 7 years.

Photographs File

Content:

Photographic prints and negatives of office, department, center, or program-related subjects.

Status and Restrictions:

Ongoing; No restrictions

Recommended Disposition:

Transfer to the custody of the Medical Center Archives identified prints and negatives

after 7 years.

Policies and Procedures File

Content:

Record copies of current office, department, center, or program policies and procedures.

Status and Restrictions:

Ongoing; No restrictions.

Recommended Disposition:

Transfer to the custody of the Medical Center Archives when superseded or obsolete.

Publications File

Content:

Reference copies of office, department, center, or program publications.

Status and Restrictions:

Ongoing; No restrictions

Recommended Disposition:

a. Transfer 2 copies of original publication to the Medical Center Archives at time of publication.; b. Destroy in office remaining copies when reference value ends.

Reference File

Content:

Reference information concerning subjects pertinent to or of interest to the office, department, center, or program. File may include publications, reports, directives and guidelines, news articles, and other material.

Status and Restrictions:

Ongoing

Recommended Disposition:

Destroy in office when superseded or obsolete.

Research Projects File

Content:

Records concerning various office, department, center, or program research projects. File may include reports, correspondence, project descriptions, and other related records.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Search Committees File

Content:

Records concerning activities of specially-formed search committees charged with recruiting new or replacement faculty members. File may include correspondence,

resumes, applications, and other related records.

Status and Restrictions:

Term appointed; Restricted for 70 years

Recommended Disposition:

a. Transfer record copy to Medical Center Archives after 5 to 7 years or when administrative value ends for searches of senior staff or other searches requiring long-term retention (if no litigation is pending).; b. All other files destroy in office 7 years after appointment.

Self-Studies File

Content:

Records concerning various self-studies conducted by the office, department, center, or program.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Special Gifts File

Content:

Records concerning special gifts to department. File may include correspondence, agreements and stipulations, descriptions of gifts, accession information, and other related records. (Comply with applicable provisions of legal agreement regarding confidentiality of records concerning each gift.)

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

a. Transfer records concerning gifts from donors who by condition of gift wish to remain anonymous to the custody of the Medical Center Archives after 2 years for permanent retention with restricted access.; b. Transfer remaining records to the custody of the Medical Center Archives after 15 years for appraisal and final disposition.

Speeches File

Content:

Record copies of speeches delivered.

Status and Restrictions:

Ongoing; No restrictions

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Staff Meetings File

Content:

Records concerning, office, department, center, or program staff meetings.

Status and Restrictions:

Ongoing; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.

Task Force File

Content:

Records generated by Chair appointed or charged task forces. File may include minutes of meetings, reports, notifications, correspondence, and other pertinent records.

Status and Restrictions:

Term appointed; Restricted for 25 years

Recommended Disposition:

Transfer to the custody of the Medical Center Archives after 7 years.