

General Retention Schedule Information

Departments and other individual programs and offices are responsible for the organization and management of the records generated within them. This schedule is not intended to be, nor could it be, an exhaustive list of the types of records your department might generate in the normal course of business. To the extent that your existing retention schedules allow for the maintenance of records for a longer duration than those indicated on the included schedule, and to the extent that you have a need for such longer retention or a particular regulation applicable to your activities requires it, then you should follow the applicable schedule.

| General Academic and Student Related | |
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| Type of Record | Duration |
| Academic Integrity Code Violations/ Student Code Violations/Student Discipline | Record of final disposition: If resulting in expulsion or withdrawal with allegations pending, Permanent. All other records and outcomes not resulting in expulsion or unresolved, 4 years from the date the student graduates or would have graduated if fully matriculated. |
| Accreditation records (programs, general institutional, etc.) | Permanent |
| Admissions Data for Applicants Who Do Not Enroll, Whether Accepted or Rejected | 1 year following acceptance/rejection date |
| Admissions Data for Applicants Who Enroll | 5 years from date of graduation or date of last attendance |
| Catalogs | Permanent |
| Class Lists (original) | Permanent |
| Consent to Release Personally Identifiable Information (Requests for Non-Disclosure) | Permanent/Update as appropriate |
| Credit/no credit, audit, pass/fail requests/approvals, etc. | 1 year from submission date |
| Degree, Grade, and Enrollment Statistics | Permanent |
| Enrollment Verifications | 1 year from enrollment date |
| Financial Aid Records (applicants who enroll) | 4 years after separation or as may otherwise be required by applicable law/regulations if longer |
| General Grade Books (Professors/departments/programs) | 1 year following start of course |
| Grades | Permanent |
| Graduation Lists | Permanent |
| Grant and Contract Applications, Proposals, and Supporting Documentation | 7 years after close of grant, or longer according to grant terms or applicable laws or regulations |
| International Student Forms (visa documentation, etc.) | 3 years or as may be required by applicable law/regulations if longer |
| Racial / Ethnic Statistics | Permanent |

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| Recruitment Materials (enrolled students) | 5 years following graduation or date of last attendance |
| Schedule of Classes (institutional) | Permanent |
| Student Health Records (routine) | 7 years following last date of attendance |
| Tenure or Promotion File | 7 years from date of last date of employment |
| Transcripts | Permanent |
| Veteran Administration Certifications | 5 years from date of graduation or last attendance |

| General Business, Accounting and Finance | |
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| Type of Record | Duration |
| Account Reconciliations (Balance Sheet) | 7 years |
| Accounts Payable Vouchers and Attachments | 7 years |
| Accounts Receivable Statements and related material | 7 years |
| Annual Financial Reports, Final analysis, etc. | Permanent |
| Audit materials | 7 years |
| Banking Records, Including Deposit and Withdrawal Records, Bank Statements and Reconciliation, Voided and Canceled checks | 7 years |
| Billing Records | 7 years |
| Capital Equipment Records | 5 years past life of the asset or end of depreciation, or longer per particular law or regulation related to source of funding (e.g., grant funds) |
| Cash Receipts | 7 years |
| Depreciation Records | Life of asset or according to requirements of funding source if longer |
| General Purchase orders/contracts for goods | 7 years or duration of contract plus 4 years, whichever is longer |
| Journal Entries | 7 years |
| Payroll records, including time sheets | 7 years |
| Personnel: Form I-9 | Retain for 3 years or 1 year following the last day of employment, whichever is longer |
| Procurement Card Charge Documentation | 7 years |
| Property Deeds, Easements, Licenses, Rights of Way, Leases, Rights of First Refusal, Remainder Interests, Mortgages | Permanent |
| Property Tax Returns filed with taxing jurisdiction | 7 years |
| Travel Reimbursements and Attachments | 7 years |

| Alumni, Planned Giving and Gift Related | |
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| Type of Record | Duration |
| Alumni Records | Permanent |
| Gift Records (general/minor) | 7 years, but business needs may warrant longer, up to Permanent |
| Grants | 7 years following completion, or longer if required under the grant or applicable law or regulations |
| Original Gift Letter Agreements | Permanent |
| Planned Gifts (trusts, life income, agreements, annuities) Real Estate Gifts | Permanent |

| Personnel, Campus Facilities, Campus Safety and Security Related | |
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| Type of Record | Duration |
| As-built Drawings | Permanent |
| Campus Master Plan | Permanent |
| Certificates of Insurance, Indemnification Agreements, Hold Harmless Agreements, Liability Waivers related to routine events and activities | 4 years following the conclusion of the event or activity |
| Certificates of Insurance, Indemnification Agreements, Hold Harmless Agreements, Liability Waivers related to major campus projects or significant activity or undertaking | Life of contract plus 20 years, or 15 years following conclusion of the activity, as applicable |
| Contracts (new construction, major renovation, major improvements) | Life of contract plus 20 years |
| Contracts and Agreements (general, routine, minor maintenance)) | Life of contract plus 4 years |
| Employee Personnel Files | 7 years following last day of employment |
| Hazardous Waste Disposal Manifests and Reports | according to applicable law or regulation |
| Incident/accident reports, property damage reports | 7 years |
| Individual Contracts of Employment | 7 years following last day of employment |
| Insurance Policies (Liability, Property, and Other Policies) | Permanent |
| Non-Academic Search Materials and Documents Supporting Hiring Selection Decisions | 3 years from date of hiring |
| Records of general maintenance | 7 years |

| Governance Related | |
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| Type of Record | Duration |
| Annual Conflict of Interest Disclosure Statements Trustees, Officers, Key employees | 7 years |
| Articles of Incorporation | Permanent |
| Board of Trustee Minutes | Permanent |
| Bylaws | Permanent |
| Charter | Permanent |
| Consent Orders | Permanent |
| Copyright and Trademark Registrations | Permanent |
| Court Orders | Permanent |
| Judgments | Permanent |
| Releases | Permanent |
| Settlements | Permanent |

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