

ALL-UNIVERSITY RECORDS RETENTION SCHEDULE

Administrative—General Office Operations (Revised 07-17)				
RECORD SERIES TITLE—FUNCTION/PURPOSE	LOCATION (*OFFICIAL COPY)	RETENTION AND DISPOSITION ACTION	DISPOSITION AUTHORITY NO.	REMARKS
<p>ADVISORY BODY RECORDS Records documenting the actions, meetings and membership of boards, commissions, committees, councils, task forces, etc., that are created to act strictly in an advisory capacity to the University and have no final decision-making powers. Also includes interagency/national/external advisory bodies for which the University acts as secretary/keeper of the official records. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Agendas, meeting/agenda packets (briefs, reference materials, etc.); • Speaker sign-up, written testimony; • Audio/visual recordings and transcripts of proceedings; • Minutes; • Reports/correspondence/communications sent/received on behalf of the body; • Appointment, reappointment and termination correspondence/communications; • Selected images/photographs showing the committee membership at particular points in time (such as board/committee portraits, etc.) and/or significant stages of the board/committee's life. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Governing/Executive/Policy-Setting Body Records (DAN GS 10004; see Admin-Exec Lvl Recs table); • Meeting Arrangements (DAN GS 09024); • Meeting Materials -- Members' Copies/Notes (DAN GS 09026); • Meetings -- Staff and Internal Committees (DAN GS 09009). 	Department*	Retain for 6 years after end of calendar year, then Transfer to Archives for appraisal and selective retention.	GS 10015	Archival (appraisal required)
<p>AWARD FILES Provides a record of application and related materials for national, regional, and statewide awards processed by the University. Includes, but is not limited to: awards processed by the Office of the Provost and Executive Vice President (e.g., Faculty Excellence, Carnegie (CASE) Professor of the Year, Burlington Northern, Bryn Mawr Awards); awards processed by WSU Extension.</p>	Department*	Retain for 2 years after award, then Transfer to Archives for appraisal and selective retention.	16-06-68981	Archival (appraisal required)
<p>BRAINSTORMING AND COLLABORATING Records generated as part of the brainstorming/collaboration process. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Notes written on whiteboards, flipcharts, large/oversize paper sheets, etc.; • Post-it notes. <p>Excludes records covered by Drafting and Editing (DAN GS 50008).</p>	Department*	Retain until no longer needed for University business, then destroy.	GS 50006	

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<p>BUSINESS/WORK PLANS Records relating to plans for the management of the University's business divisions/units, projects, assets, workforce, etc., including timelines, performance measures and areas of responsibility. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Final plan; • Records relating to the development of the plan. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Disaster Preparedness/Emergency and Recovery Plans (DAN GS 14010; see Security Recs table); • Organizing/Monitoring Work in Progress (DAN GS 50011); • Strategic Plans – Final (Unpublished) (DAN GS 10001; see Admin-Exec Lvl Recs table); • Strategic Plans – Development (DAN GS 09027; see Admin-Exec Lvl Recs table). 	Department*	Retain for 2 years after completion/expiration of plan, then destroy.	GS 09008 Rev. 1	
<p>CALENDARS -- EMPLOYEES (OTHER THAN ELECTED OFFICIALS AND UNIVERSITY HEADS) Records documenting the day-by-day meetings and other work-related appointments of University employees other than elected officials and University heads. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Calendar records stored in Microsoft Outlook and other calendaring software/apps; • Hardcopy calendars/appointment books/diaries/etc. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Calendars -- Elected Officials and University Heads (DAN GS 10008; see Admin-Exec Lvl Recs table); • Organizing/Monitoring Work in Progress (DAN GS 50011); • Scheduling -- Appointments/Meetings (DAN GS 50014). 	Department*	Retain for 1 year after end of calendar year, then destroy.	GS 09023 Rev. 1	
<p>CHARITY FUNDRAISING (COMBINED FUND DRIVE) Records relating to the University's coordination, participation, and support of fundraising campaigns and promoting employee payroll deductions for charities. Note for WSU purposes: This series applies to Combined Fund Drive fundraising campaigns only. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Decision process for selecting charity campaigns to support; • Communication between the University and charities; • Dissemination of charity information; • Arrangements and promotion of campaign events. <p>Excludes:</p> <ul style="list-style-type: none"> • Authorization of payroll deductions covered by Accumulated Calendar Year to Date Expense Microfiche (DAN 16- 06-68985) and Earnings Statement Microfiche (DAN 16-06-68988), both held by Payroll Svcs. (office #2710). 	Charity Fund Drive Campaign Coordinator*	Retain for 6 years after end of fiscal year, then destroy.	GS 09021 Rev. 2	

ALL-UNIVERSITY RECORDS RETENTION SCHEDULE

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<p>CLIENT/CUSTOMER FEEDBACK AND COMPLAINTS Records relating to the capturing and receiving of feedback/information/data (including complaints) from the University's clients/customers concerning policies, procedures, business practices, customer service, etc., where not covered by a more specific records series. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Thank-you messages, kudos, etc.; • Client/customer satisfaction surveys (including the design and distribution of such surveys); • Internal and external correspondence/communications relating to complaints, their investigation and resolution. <p>Excludes records covered by Whistleblower Investigations (DAN GS 04004; see Accounting/Fiscal Recs table).</p> <p>For WSU purposes, this records series also excludes records covered by Complaints and Grievances -- Exonerated (DAN 03006) and Complaints and Grievances -- Upheld (DAN 03003); see the All-Univ Recs Rtn Schedule-- Payroll/Personnel Records table for both.</p> <p><i>Note: Retention based on 3-year statute of limitations for personal injury (RCW 4.16.080).</i></p>	Department*	Retain for 3 years after feedback received/ resolution of complaint, then destroy.	GS 09016 Rev. 1	
<p>CONTACT INFORMATION Records relating to the contact details of external clients/ stakeholders the University has gathered/received and the maintenance of such lists/collections. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Business cards; • Contact details stored in Microsoft Outlook and other contact databases; • Mailing lists, email distribution lists, listserv/RSS subscriber details, etc.; • Requests to be added/removed from the University's contact lists (includes mail/communications returned as undeliverable); • Quality assurance checks; • Related correspondence/communications. <p>Excludes records covered by Emergency/Disaster Preparedness -- Contact Information (DAN GS 25004; see Security Recs table).</p>	Department*	Retain until no longer needed for University business, then destroy.	GS 50007	
<p>DRAFTING AND EDITING Records relating to the drafting/editing of correspondence, documents and publications. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Preliminary drafts not covered by a more specific records series, not needed as evidence of external consultation or as evidence that the University practiced due diligence in the drafting process; • Edits/suggestions/directions (such as handwritten annotations/notes, track changes information/comments in Microsoft Word, etc.); • Electronic documents created solely for printing (such as signs, mailing labels, etc.); • Related correspondence/communications. <p>Excludes records covered by Legal Advice and Issues (DAN GS 18003; see Legal Files table).</p>	Department*	Retain until no longer needed for University business, then destroy.	GS 50008	

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ELECTRONIC COMMUNICATIONS RETENTION Electronic communications are methods of sending or receiving information, not types of records. Electronic communication methods include, but are not limited to, e-mail, instant messaging, social networking, and text messaging. Information generated or received on an electronic communication system needs to be managed according to the informational content of the message. Electronic communications messages that are public records must be identified, scheduled, and retained. (See 90.03.)	Department*	Retain in accordance with the records series that is applicable to the informational content of the message. (See 90.03.)	-- various --	
ELECTRONIC DOCUMENTS USED TO CREATE SIGNED PAPER RECORDS Electronic documents created in order to print paper records that get signed, provided the signed paper records (or University copy of same, if signed original is sent) are retained in accordance with the current approved minimum retention period. Includes, but is not limited to: <ul style="list-style-type: none"> • Microsoft Word versions of minutes/letters/ correspondence/etc. used to print the hard copy that gets signed. <i>Note: University departments should still create and retain copies of signed letters as evidence of the business transaction.</i>	Department*	Retain until no longer needed for University business, then destroy.	GS 50009	
ESTABLISHMENT/DEVELOPMENT HISTORY OF UNIVERSITY/PROGRAMS Records documenting the planning, establishment and significant changes/developments of the University and its programs. Includes, but is not limited to: <ul style="list-style-type: none"> • Summaries/histories of the University/programs; • Scrapbooks, news clippings, photographs, etc., documenting the history of the University/programs; • Organizational charts and other planning records documenting significant changes/restructures (such as University mergers/splits, creation/combinations of divisions, major changes of University functions/roles, etc.); • Transitional documentation prepared for incoming officials/University heads. 	Department*	Retain for 6 years after end of calendar year, then Transfer to Archives for appraisal and selective retention.	GS 10013 Rev. 1	Archival (appraisal required)

ALL-UNIVERSITY RECORDS RETENTION SCHEDULE

Administrative—General Office Operations (Revised 07-17)				
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<p>INFORMATIONAL NOTIFICATIONS/COMMUNICATIONS Records communicating basic/routine short-term information (regardless of format or media used) that:</p> <ul style="list-style-type: none"> • Do not document University decisions/actions; • Are not used as the basis of University decisions/actions; and • Are not covered by a more specific records series. <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Basic messages such as “Come and see me when you’re free,” “Call me back at (360) 555-5555,” etc. • Internal communications notifying of staff absences or lateness (such as “Bob is out today,” “Mary is running late,” etc.), provided the appropriate attendance and leave records are retained in accordance with the appropriate records series; see All-Univ Recs Rtn Schedule--Payroll/Personnel Recs table. • Internal communications notifying of staff social events/gatherings (such as potlucks, birthdays, fun runs, cookies in the break room, etc.) or of weather/traffic conditions (such as “Avoid I-5, it’s a parking lot,” “Take care – it has started snowing,” etc.) • Email delivery/read receipts, out-of-office notices, etc. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Provision of Advice, Assistance or Information (DAN GS 09022); • Attendance and leave records (Note for WSU purposes: See multiple series in the All-Univ Recs Rtn Schedule--Payroll/Personnel Recs table.) 	Department*	Retain until no longer needed for University business, then destroy.	GS 50001 Rev. 2	
<p>INTERNET BROWSING Records routinely generated as part of internet browsing. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Browsing history/saved passwords/web form information, etc.; • Cache/temporary files; • Cookies. <p>Excludes internet activity log records covered by Audit Trails and Systems Usage Monitoring (DAN GS 14020; see Info Svcs Recs table).</p>	Department*	Retain until no longer needed for University business, then destroy.	GS 50010	
<p>MEETING ARRANGEMENTS Records relating to the administrative arrangements of meetings held by or on behalf of the University. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Agenda requests; • Arrangement of catering, facilities and equipment. <p>Excludes:</p> <ul style="list-style-type: none"> • Records covered by Scheduling -- Appointments/ Meetings (DAN GS 50014); • Financial records (facilities, catering, etc.) covered by Financial Transactions -- General (DAN GS 01001; see Acct/Fiscal Recs table); • Open Public Meeting Act notices filed with the Code Reviser/State Register in accordance with RCW 42.30.075 covered by Reporting to External Agencies (Mandatory) (DAN GS 19004); • Travel arrangements/expenses covered by Travel (DAN GS 07001; see Travel Recs table). 	Department*	Retain until no longer needed for University business, then destroy.	GS 09024	

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<p>MEETING MATERIALS -- MEMBERS' COPIES/NOTES Individual members' meeting materials from participating in advisory, governing/executive/policy-setting, internal/external committees (including national/external bodies), provided the committee's records are retained by the secretary/responsible agency/member. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Copies of agendas, meeting packets, minutes, etc.; • Working notes/drafts, etc.; • Related correspondence/communications. 	Department*	Retain until no longer needed for University business, then destroy.	GS 09026	
<p>MEETINGS -- STAFF AND INTERNAL COMMITTEES Records documenting meetings of the University's staff and those of internal committees, commissions, councils, boards, task forces, etc. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Agendas, meeting/agenda packets (briefs, reference materials, etc.); • Speaker sign-up, written testimony; • Audio/visual recordings and transcripts of proceedings; • Minutes. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Meetings -- Advisory Body Records (DAN GS 10015); • Meetings -- Governing/Executive/Policy-Setting Body Records (DAN GS 10004; see Admin-Exec Lvl Recs table); • Meeting Arrangements (DAN GS 09024); • Meeting Materials -- Members' Copies/Notes (DAN GS 09026). 	Department*	Retain for 2 years after end of calendar year <i>and</i> until no longer needed for University business, then destroy.	GS 09009 Rev. 1	
<p>ORGANIZING/MONITORING WORK IN PROGRESS Records relating to the assigning, prioritizing, tracking/monitoring and status of work/projects in progress. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Status logs; • To-do lists; • Tasks within Microsoft Outlook, etc.; • Routing slips; • Workflow notifications/escalations. 	Department*	Retain until no longer needed for University business, then destroy.	GS 50011	
<p>POLICIES AND PROCEDURES -- ADMINISTRATIVE FUNCTIONS Records relating to the development, implementation and interpretation of the policies and procedures developed by the University to implement internal administrative functions (such as facility management, finance, human resources, purchasing, information management, etc.) where these functions are not the University's core mission. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Each adopted/approved version of policies and procedures; • Records documenting the development of policies and procedures. <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Rule Making (Washington Administrative Code -- WAC) (DAN GS 10009; held by Procedures, Records, and Forms, office #1470); • Work Instructions/Desk Manuals (DAN GS 09001). 	Department*	Retain for 6 years after superseded, then destroy.	GS 09028	Essential

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<p>PROCESS IMPROVEMENT Records relating to process improvements undertaken by the University to improve the efficiency and effectiveness of the University, its programs and services. Includes process improvement initiatives at both the:</p> <ul style="list-style-type: none"> • University level (such as employee suggestion programs, etc.); and • Government-wide level (such as LEAN; Government Management, Accountability and Performance Program (GMAP); Plain Talk; Balanced Scorecard; Performance Partnership; Brainstorm or Team Incentive Program (TIP); etc.). <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Plans and studies (such as Time-in-Motion, etc.); • Performance measures/statistics/reports; • Evaluations; • Related correspondence/communications. 	Department*	Retain for 6 years after end of improvement cycle/project, then destroy.	GS 09012	
<p>PROVISION OF ADVICE, ASSISTANCE, OR INFORMATION Records relating to requests received and provision of advice, technical assistance and information (including University-initiated communications) concerning the University, its core business, programs and services, where not covered by a more specific records series Includes, but is not limited to: Internal and external correspondence/communications (regardless of format) relating to the request/University-initiated advice, assistance or information. Excludes records covered by:</p> <ul style="list-style-type: none"> • Public Disclosure/Records Requests (DAN GS 05001; see All-Univ Recs Rtn Schedule--Pub Affs & Pub Discl); • State Publications (DAN GS 15008; see All-Univ Recs Rtn Schedule--Pub Affs & Pub Discl) • Requests for Basic/Routine Agency Information (DAN GS 50002) <p>NOTE: Information/advice published online by the University continues to be "provided" until the date it is removed/withdrawn.</p>	Department*	Retain for 2 years after communication received or provided, whichever is later, then destroy.	GS 09022 Rev. 1	

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<p>RECORDS DOCUMENTED AS PART OF MORE FORMALIZED RECORDS Records where the evidence of the business transaction has been documented as part of another more formalized record of the University which is retained in accordance with the current approved minimum retention period. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Data entry input records (such as paper forms, handwritten notes, etc.) that have been documented as records within University information systems (such as databases) provided the original record/form (including any signatures) is not required as evidence or authorization of the transaction; • Working/rough notes, voicemail messages, text messages, social media posts, etc., that have been memorialized/captured in another format such as a note-to-file, email confirming the conversation, speech-to-text translations, etc.; • Automatically-generated email notifications sent out by University information systems provided the transaction is captured as part of an audit trail; • Raw data/statistics/survey responses that have been consolidated/aggregated into another record. <p>Excludes:</p> <ul style="list-style-type: none"> • Electronic records (such as emails) that have been printed to paper; • Audio/visual recordings of meetings covered by Advisory Body Records (DAN GS 10015), Governing/Executive/Policy-Setting Body Records (DAN GS 10004; see Admin-Exec Lvl Recs table) or Meetings – Staff and Internal Committees (DAN GS 09009). <p><i>Note: Electronic records need to be retained in electronic format in accordance with WAC 434-662-040.</i></p>	Department*	Retain until verification of successful conversion/keying/transcription, then destroy.	GS 50012	
<p>REFERENCE MATERIALS Materials gathered from outside sources for reference/reading use which are not evidence of the University's business transactions. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Conference materials (such as proceedings, handouts, etc.) from conferences/seminars not organized by the University; • Copies of published articles, reports, etc.; • Internet browser favorites/bookmarks; • Listserv/RSS feeds. <p>Excludes records covered by Secondary (Duplicate) Copies (DAN GS 50005).</p>	Department*	Retain until no longer needed for University business, then destroy.	GS 50013	
<p>REPORTING INTERNALLY -- ROUTINE PROGRAM/PROJECT/WORK UNIT REPORTS/STATISTICS Records relating to routine internal statistical and narrative reports provided to management documenting/tracking the activities and work accomplishments of a division/program/project for a given time period. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Monthly/quarterly/yearly reports. <p>Excludes:</p> <ul style="list-style-type: none"> • Annual reports of the university and other published reports covered by State Publications (DAN GS 15008; see Public Affairs and Public Disclosure Recs table); • Records covered by Records Documented as Part of More Formalized Records (DAN GS 50012). 	Department*	Retain for 2 years after end of fiscal year, then destroy.	GS 09029	

ALL-UNIVERSITY RECORDS RETENTION SCHEDULE

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<p>REPORTING TO EXTERNAL AGENCIES (MANDATORY) Records relating to the mandatory reporting/notifying/filing by the University to external agencies in accordance with federal, state or local law or by court order/rule where not covered by a more specific records series, such as reporting to:</p> <ul style="list-style-type: none"> • Federal agencies; • Code Reviser/State Registrar; • Public Disclosure Commission (Public Agency Lobbying L-5 Report); • Office of Financial Management; • Other state agencies, local government entities, etc. <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • University copy of reports/forms/certificates/lists submitted; Submission confirmation and inquiries; • Related correspondence/communications. <p>Excludes:</p> <ul style="list-style-type: none"> • Notifications covered by Security Incidents and Data/Privacy Breaches (DAN GS 25008; see All-Univ Recs Rtn Schedule--Security Recs); • Records covered by Reporting/Filing (Mandatory) – Employment-Related (DAN GS 03056; see All-Univ Recs Rtn Schedule--Payroll/Personnel Recs); • Voluntary reporting/notifying, responding to surveys, etc., covered by Provision of Advice, Assistance or Information (DAN GS 09022; see All-Univ Recs Rtn Schedule--Admin-Gen Office Recs); • Reports/notifications/filings received by the University from other entities covered by the University-specific records retention schedule; • For WSU purposes, records covered by Clery Reporting Files (DAN 17-06-69062; held by WSU Police Department, office #3040). 	Department*	Retain for 6 years after submitted, then destroy.	GS 19004 Rev. 1	
<p>REQUESTS FOR BASIC/ROUTINE UNIVERSITY INFORMATION Internal and external requests for, and provision of, routine information about the operations of the University, such as:</p> <ul style="list-style-type: none"> • Business hours, locations/directions, web/e-mail addresses • Meeting dates/times <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Public Disclosure/Records Requests (DAN GS 05001; see Public Affairs and Public Disclosure Recs table); • Provision of Advice, Assistance or Information (DAN GS 09022). 	Department*	Retain until no longer needed for University business, then destroy.	GS 50002 Rev. 1	

ALL-UNIVERSITY RECORDS RETENTION SCHEDULE

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<p>SCHEDULING -- APPOINTMENTS/MEETINGS Records relating to the scheduling of appointments/ meetings (such as checking participant and room availability, rescheduling, accepting/declining meeting invitations, etc.) provided the calendar record of the appointment/meeting is retained in accordance with:</p> <ul style="list-style-type: none"> • Calendars -- Elected Officials and Agency Heads (DAN GS 10008; see Admin-Exec Lvl Recs table); • Calendars -- Employees (Other than Elected Officials and University Heads) (DAN GS 09023). <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Meeting invitations and accepted/declined notifications in Microsoft Outlook and other calendaring/scheduling software/apps; • Related correspondence/communications. 	Department*	Retain until no longer needed for University business, then destroy.	GS 50014	
<p>SECONDARY (DUPLICATE) COPIES Copies of records (created or received), provided that the University retains the primary copy of the record in accordance with the current approved minimum retention period. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Data extracts and printouts from University information systems; • Cc's of emails, provided the University is retaining its primary copy of the email; • Convenience/reference copies of records; • Duplicate and near-duplicate images/photographs provided the selected "best" image(s) documenting the occasion/object is retained. <p>Excludes records which are the University's only copy of the record, even if it is held by another agency. NOTE: This does not apply to records series that have stated retention periods for secondary copies.</p>	Department*	Retain until no longer needed for University business, then destroy.	GS 50005 Rev. 1	
<p>STUDIES (MINOR/ROUTINE) Records relating to the conducting of minor/routine studies and developing ad hoc reports not initiated at the executive level or conducted in response to a legislative order, executive order, federal requirement or court order where not covered by a more specific records series. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Reports and compiled survey results; • Charts, diagrams and statistics; • Research materials; • Related correspondence/communications. <p>Excludes collections of external materials covered by Reference Materials (DAN GS 50013).</p>	Department*	Retain for 2 years after conclusion of study, then destroy.	GS 09006 Rev. 1	

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<p>UNIVERSITY-GENERATED FORMS AND PUBLICATIONS -- COPIES Blank forms and duplicate copies of publications, provided the University retains the primary record in accordance with the current approved minimum retention period and that the forms are not required for audit or accountability purposes. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Reports, catalogs, brochures, calendars, posters; • Multi-media presentations (videos, CDs, etc.). <p>Excludes records covered by:</p> <ul style="list-style-type: none"> • Forms -- Accountable (DAN GS 12004; see Records Mgmt Files table); • State Publications (DAN GS 15008; see Public Affairs and Public Disclosure Recs table). 	Department*	Retain until no longer needed for University business, then destroy.	GS 50003 Rev. 1	
<p>UNSOLICITED ADDITIONAL MATERIALS Additional materials received by the University that are:</p> <ul style="list-style-type: none"> • Not requested; and • Not used by the University in the course of government business. <p>Includes, but is not limited to:</p> <ul style="list-style-type: none"> • Superfluous extra materials provided with applications (including health/medical records); • Information entering through online applications, e-forms, etc., but not completed and not submitted to the University. 	Department*	Upon receipt, return to sender <i>or</i> destroy.	GS 50015	
<p>WORK INSTRUCTIONS/DESK MANUALS Routine, day-to-day task/work instructions, desk manuals, etc.</p>	Department*	Retain until superseded, then destroy.	GS 09001 Rev. 1	