

## Record Retention Schedule Copying Services

\*\*\* FOOTNOTES INDICATE CURRENT DEPARTMENTAL PRACTICE \*\*\*

| Category/Type of Record   | MINIMUM Retention Period<br>(in calendar years, unless otherwise indicated)   |
|---|---|
| <b>Building Maintenance/Management</b>  |   |
| Key Records (records of issuance, re-issuance, return)  | Permanently   |
| <b>Committee/Department Records</b>   |   |
| Committee Records, Official [committees and advisory groups listed on Registrar's website at <a href="http://registrar2.wlu.edu/faculty/faccomm.htm">http://registrar2.wlu.edu/faculty/faccomm.htm</a> (e.g. minutes and official correspondence -- responsibility of committee chair and/or designee)] | Until the end of the current SACS accreditation cycle (which currently runs through 2019), but not less than 5 years        |
| Individual Committee Member Service Records (i.e. service on W&L committees)  | No required minimum   |
| General Departmental Administrative Records (e.g. budget files, capital requests, staff meeting minutes, recommendations / reports on departmental matters, general correspondence, disbursements, leave schedules, CHRON files, departmental programming, etc.)  | Retain for as long as administratively useful   |
| Record Disposition Logs   | Permanently   |
| Statistics / Records / Reports that Document Compliance with SACS Standards   | Until the end of the current applicable accreditation cycle(s) SACS currently runs through 2019), but not less than 5 years |
| <b>Contracts and Agreements</b>   |   |
| Purchase Orders, Contracts, Leases, Agreements (including documents relating to a verbal agreement/contract)  | 5 from fulfillment of obligations or termination of contract  |
| Repair and Service Records (departmental purchases)   | Until equipment disposed of   |
| Warranty Files (departmental purchases)   | 1 after warranty expiration   |
| Written Delegation of Authority to Sign Contracts   | Indefinitely  |
| <b>Export Controls</b>  |   |
| Export Control Licenses and Associated Documentation [including records related to transactions involving travel to foreign countries or other "exports" (including disclosure of certain technology/information to foreign nationals), for which a license is required.]                               | Consult the terms of the specific license, but not less than 3 years  |

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| <b>Family Educational Rights and Privacy Act Data/Documents</b>   |   |
| Student Consent to Disclosures of Personally Identifiable Information   | As long as education records of the student are maintained                  |
| Student Recommendation/Reference Letter (NON-work-study)  | 2 from date provided  |
| <b>Human Resources</b>  |   |
| Conflict of Interest Disclosure Statements (staff & faculty, where applicable)  | 2   |
| Job Applications, Employment Inquiries and All Other Records for NON-HIRED<br>Faculty/Staff Applicants (NOT otherwise included in any search committee file)    | 3 from date of hiring decision  |
| Personnel Files for Faculty/Staff<br>(e.g. supervisor records re: performance/attendance/discipline/etc. that<br>are not otherwise kept in HR or Dean's Office) | 5 from separation   |
| References (employees, work-study students, etc.)   | Later of 2 after separation or 2 from date provided                         |
| Student Worker Personnel Files (including Federal Work-Study students)  | 5 after graduation or date of last attendance                               |
| <b>Insurance and Risk Management</b>  |   |
| Waivers/Releases (e.g. Agreements of Responsible Travel, Fitness Center, etc.)  | Later of 5 from date signed or 5 from completion of activity                |
| <b>Intellectual Property</b>  |   |
| Copyright Release and Permission Forms  | 3 from date of last use/publication   |