Records Retention and Disposition Schedule

March 2024

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Provost and Vice President for Academic Affairs

Records Retention Policy

Policy Statement

Saint Elizabeth University requires University records be retained for specific periods of time, and has designed official repositories for their maintenance. These records must be maintained according to procedures that are outlined in this document.

Reason for Policy

Saint Elizabeth University is committed to effective records retention to preserve its history, ensure that critical records are available to meet business needs, comply with legal requirements, optimize the use of space, minimize the cost of record retention, and ensure that outdated and useless records are destroyed.

Records Retention

The retention periods set forth in the attached Records Retention and Disposal Schedule are the minimum retention periods. At the conclusion of the retention period, the Records should be properly disposed of per this Policy. Since no document list can cover all possible records, questions regarding the retention period for a specific document or class of documents not included in the Records Retention and Disposal Schedule should be addressed to the appropriate vice president. This Policy sets forth procedures to manage the retention and disposal of records, and is intended to ensure that the University:

- Meets legal standards;
- Properly manages the use of electronic and physical storage space;
- Preserves the history of the University;
- Disposes of outdated records.

No one person can be directly responsible for all University Records. Therefore, every office or department managing University records is responsible for:

- Implementing records management practices consistent with this Policy;
- Educating staff in the records management practices;
- Preserving records as required under this Policy;
- Properly disposing of inactive records at the end of the applicable retention period;
- Protecting records against misuse, misplacement, damage, destruction, or theft;
- Monitoring compliance with this Policy.

Consult with the following on matters related to retention and disposition of records.
- Financial Records – Vice President for Finance and Administration
- Academic Records – Vice President for Academic Affairs
- Student Conduct Records – Dean of Student Life
- Personnel Records – Vice President of Strategic Enrollment Management and Director of Human Resources

Confidentiality Requirement

Many records subject to record retention requirements contain confidential information (e.g., dates of birth, social security numbers, and financial information). These records are protected by federal, state and local statutes, including the Health Insurance Portability and Accountability Act (HIPPA), the Family Educational Rights and Privacy Act (FERPA), and the Gramm-Leach Bliley (GLB) Act.

All records pertaining to ongoing or pending audits or lawsuits (including reasonably anticipated lawsuits) should not be destroyed, or altered, even if the records retention period date has expired, until you receive written notification that the matter has been resolved. If you have reason to believe that a record scheduled for destruction may pertain to any of these matters, do not destroy the record and contact the appropriate vice president.

University Records Disposal

If the record retention period has expired and the record is not appropriate for maintaining in the University Archives, the record should be recycled or destroyed. Most of the records that the University maintains do not contain personal information. Disposal of records without personal information may be made by any appropriate means, including recycling of paper records. Disposal of electronic records, including emails, should be done in conjunction with IT department.

Storing or disposing of records that contain personal information requires special consideration. Options for disposing records with personal information include: (a) shredding the record; (b) destroying the personal identifying information contained in the record; (c) modifying the record to make the personal identifying information unreadable; or (d) taking reasonable actions consistent with commonly accepted practice for protecting personal information.

University Records Disposal and Storage Resources

Archives: The Archival storage area is located on the second floor of Mahoney library. It is the repository for such items as commencement programs, yearbooks, University catalogs, blueprints, photographs, correspondence and office files relevant to the history of the University.

Electronic Media and Equipment: Electronic records have the same retention periods as tangible records.

Recycling: Saint Elizabeth University complies with all existing rules and regulations promulgated by the New Jersey Department of Sanitation. Recycling is generally appropriate for all non-confidential paper documents.

Shredding: Departments within Saint Elizabeth University utilize external vendors for the shredding disposal of records through designated pickup dates, times, and locations. Shredding must be used to dispose of documents that should not be read by others after they are no longer needed or that contain personnel or confidential information, information that is student information protected by FERPA, HIPPA, or financial information.

Records Types and Records Custodians

Active vs Inactive Records: An active record is an original University record currently used by the office, department or other area of the University that generated the record. Active records remain active for varying numbers of years, depending on the purpose for which they were created and regulatory requirements. Active records may be retained in the originating office or at an offsite storage company. Active records are in all formats, including but not limited to: paper, fiche, digitized or scanned documents, electronic documents. All active and inactive records are listed on the **Records Retention Schedule.** Active records are records that are generally referred to by a University employee at least once a month. Inactive records are records that are not referred to or utilized for at least one year.

1. **Employment Search Committee Records**

Federal record keeping regulations require retention of any employment search record made for a period of two years from the making of the record or two years from the date the employee selection is made whichever is later. Two sorts of "records" must be retained:

original "hard" copy records (unless the original document is electronically scanned) and "soft" records such as electronic databases, etc. The University of Saint Elizabeth makes and retains both sorts of records. The objective of record keeping is retrieval. That is, for compliance purposes it is essential not only to retain records but to be able to access them for mandatory self-audit and government reporting as required. The purpose of both is to monitor the employer's selection process; therefore, the focus of the analysis is not the individual applicant or selectee but the employer's selection decision. The standards for the disposal of documents are the same regardless of how far the applicant progressed in the search. These documents are considered confidential and should be disposed of properly by shredding them at the appropriate time.

2. **Academic Department Records**

Academic department and program files are critical for documenting the history of the University and should be maintained, managed, and archived. If the current departmental chair maintains the records in his or her own office or on his or her own computer exclusively, the department chair is responsible for transferring all electronic and paper records to the department academic coordinator when his or her term as chair ends. The department academic coordinator has a key role in long term maintenance of departmental records.

3. **Sponsored Research, Grants, External Support Records**

Faculty members and other grantees employed by the University will have records related to external funding support. There are special rules that apply to funds received from the federal government and each grant may have its own set of rules and requirements related to records. All grantees are responsible for ensuring the University complies with these records rules and requirements.

4. **Student Conduct Records**

The Office of Student Life is responsible for creating and maintaining student conduct records in response to incidents where students violate University policies. When incidents occur, they are documented through official reports such as Campus Security Incident Reports.

5. **Electronic Records**

File maintenance of electronic records requires coordination among the places where they are stored such as hard-drives on desk tops, laptops, on shared drives, and on removable storage media. Any electronic record that merits permanent retention should be maintained electronically and also printed and maintained in a paper filing system.

6. **Data Systems Records**

University-wide electronic data systems generally contain information that if lost, corrupted or disclosed without authorization could result in the disruption of business function at the University. Reports containing private or confidential data should be disposed of properly which means shredding all paper copies and erasing hard drives and disks so that the data are not retrievable.

Upon separation from the University, all employees are expected to return any computing devices purchased with University funds, which includes departmental, startup, and research/grant funds. A departing employee should contact the Office of Informational Technology at extension 973-290-4015 to arrange for the return of University- owned computing devices and for assistance with the migration of any digital assets from the University- owned computing device to a personally-owned computing device. Staff members should seek approval from their supervisor before requesting such service as some digital assets cannot be transferred without prior authorization from the appropriate vice- president.

7. **Electronic Mail**
Electronic mail should be treated like any other electronic record. Even though email is backed up centrally, it is not kept as a system record. Each email user is responsible for retaining email containing important information.

8. **Records Related to Web Sites**
Web masters and those uploading content to web sites should capture copies of their web sites' content annually for permanent retention.

9. **References**
Birmingham-Southern College (2014)
Retrieved from https://intranet.birmingham.ac.uk/as/specialcollections/modernrecordsstore/retention.aspx

Catholic University of America (2019)
Retrieved from https://policies.catholic.edu/governance/records.html

New Jersey Records Manual
Retrieved from https://nj.gov/treasury/revenue/rms/manual/RMSManual.pdf

Record Type		Office Retention Period	Final Disposition
President			
Annual reports of all departments (instructional & admin)		10 years	destroy
Board of Trustee files		permanent	permanent
Commencement files		permanent	permanent
Middle States policies, pamphlets, reports		permanent	permanent
NJ Commission of Higher Education		permanent	permanent
NJ Presidents Council		1 year	destroy
President's Cabinet files		permanent	permanent
Sisters of Charity administration building		permanent	permanent
Sisters of Charity articles of incorporation		permanent	permanent
Sisters of Charity financial policy		permanent	permanent
Sisters of Charity general		10 years	destroy
Sisters of Charity promissory note		permanent	permanent
Student general		1 year	destroy
US Dept of Education Civil Rights compliance		permanent	permanent
US Dept of Education Title IV		permanent	permanent
Provost and Vice President, Academic Affairs			
Academic Affairs			
All Committee and Meeting Minutes		5 years	archives

Accreditation records		While active	archives
Course Outlines		5 years	destroy
Final Exams		3 years	destroy
Middle States Reports		10 years	archives
New Major/Minor programs/ Commission on Higher Ed		5 years	archives
Self-Study reports		10 years	archives
Student course evaluations		3 years	destroy
Student Success Center			
Basic skills testing		at graduation or 5 years after termination	destroy

Tutoring documentation		at graduation or 5 years after termination	destroy
Tutoring requests		at graduation or 5 years after termination	destroy
Employment applications - student		1 years	destroy
Employment contracts		while enrolled	destroy
Pay sheets		2 years	destroy
EOF/HLP			
Contracts/budgets/expenditure reports		7 years	destroy
Correspondence		7 years	destroy
EOF supplemental rosters		2 years	destroy
Program reports		7 years	destroy
Student applications		7 years after termination of grant	destroy

		3 years after graduation or termination	destroy
Student information			
Institutional Research			
(AF=Assessment File, UFB= University Fact Book)			
Academic Vice President	AF	5 years	archives
Accelerated Certification for Teaching (ACT)	UFB	5 years	archives
ACT statistics	UFB	10 years	archives
ACT/COMP test results	UFB	10 years	archives
Admission office	AF	5 years	archives
Adult Undergraduate Degree Program (AUDP)	AF	5 years	archives
Age distribution	UFB	10 years	archives
Alumnae/ni	AF	5 years	archives
Annual reports-IR office		5 years	archives
AP/4 Dietetic Internship-summary	UFB	10 years	archives
Awards and honorary degrees-summary	UFB	5 years	archives
Bishops of Paterson-summary	UFB	permanent	permanent
Buildings-size and ownership-summary	UFB	permanent	permanent
Campus climate study	UFB	5 years	archives

Career Services	AF	5 years	archives
Center for Theological and Spiritual Development	AF	5 years	archives
Certificate awards		10 years	archives
Certificates statistics-summary	UFB	permanent	permanent
CIRP reports	AF	5 years	archives
Class section sizes-summary	UFB	5 years	archives
Class size by semester	UFB	5 years	archives

Classroom and laboratory capacity	UFB	While active	destroy
Classroom and laboratory usage	UFB	10 years	destroy
Common Data Set survey		5 years	archives
Cost study by department and program	UFB	10 years	archives
Counseling Center	AF	5 years	archives
Credit hours generated (annual)	UFB	5 years	archives
Cross campus registration-summary	UFB	5 years	archives
Dean's list-summary by class	UFB	5 years	archives
Degree statistics	UFB	10 years	archives
Dietetic Internship statistics	UFB	10 years	archives
Diploma signatures	UFB	permanent	permanent
Enrollment and residence comparison	UFB	5 years	archives
Enrollment by class and status	UFB	10 years	archives
Enrollment projections		5 years	destroy
Enrollment total	UFB	5 years	archives
EOF student summary	UFB	5 years	archives
EOF/HLP reports	UFB	5 years	archives
Ethnic distributions	UFB	5 years	archives
Ethnicity statistics	UFB	permanent	permanent
Faculty information-summary	UFB	5 years	archives
Faculty-by ethnicity-summary	UFB	5 years	archives
Faculty-frequency & percentage distrib by highest degree	UFB	5 years	archives
Faculty-full time by academic rank and degree	UFB	5 years	archives
Faculty-number of instructors-Sisters of Charity & lay	UFB	5 years	archives
Faculty-salary analysis	UFB	5 years	archives
Faculty-tenure-summary	UFB	5 years	archives

Federal Register-excerpts		10 years	destroy
Financial aid-summary	UFB	5 years	archives
Focus on student project	AF	5 years	archives
Freshman-distribution by age	UFB	5 years	archives
Freshman-enrollment	UFB	10 years	archives
Freshman-ethnic background	UFB	10 years	archives
Freshman-from schools staffed by Sisters of Charity	UFB	5 years	archives
Freshman-percent of Roman Catholic	UFB	5 years	archives
Freshman-profiles	UFB	6 years	archives
Freshman-ranks	UFB	5 years	archives
Freshman-SAT mean scores	UFB	5 years	archives
Geographic distribution-NJ/Non-NJ	UFB	5 years	archives
Governance committee report	AF	5 years	archives
Graduate Programs	AF	5 years	archives
Graduate Program statistics	UFB	5 years	archives
Health Center	AF	5 years	archives
HLP student summary	UFB	5 years	archives
Honors statistics-summary	UFB	permanent	permanent
Independent College Fund of NJ survey		5 years	archives
Institutional Advancement	AF	5 years	archives
Institutional Research	AF	5 years	archives
International students		10 years	archives
Inventory/guidelines/recommendations	AF	permanent	permanent
IPEDS surveys		5 years	archives
Leadership Training Program	AF	5 years	archives
Library collection-summary	UFB	10 years	archives

Major enrollment-summary	UFB	5 years	archives
Majors-new with CIP codes	UFB	permanent	permanent
Matriculated student percentages	UFB	5 years	archives
Middle States institutional profile surveys	UFB	5 years	archives
Minor enrollment-summary	UFB	5 years	archives
Minority/International graduates		permanent	permanent
Mission statements and outcomes	AF	10 years	archives

National study of instructional costs & productivity		5 years	archives
Nat'l Assn of Independent Colleges & Universities (NAICU)		5 years	archives
NCAA information requests (surveys)		5 years	archives
NJ Commission on Higher Education		5 years	archives
NJ Aid to Independent Colleges		10 years	archives
NJ Department of Higher Education		5 years	archives
NJ Department of Higher Education nursing appropriations		10 years	archives
NJ State surveys		5 years	archives
Planning materials		5 years	destroy
Policies		10 years	archives
Presidents-summary	UFB	permanent	permanent
President's reports statistics		10 years	archives
Procedures		10 years	archives
Questionnaires-miscellaneous		3 years	destroy
Religious distribution-summary	UFB	5 years	archives
Residence Life	AF	5 years	archives
Roman Catholic students-summary	UFB	5 years	archives
Schedule L enrollment completion		7 years	archives

Schools staffed by Sisters of Charity-summary	UFB	5 years	archives
Staff statistics-summary	UFB	5 years	archives
Student Life (general)	AF	5 years	archives
Student right to know		10 years	archives
Student/faculty ratios	UFB	5 years	archives
Title IV application, Post-Baccalaureate		5 years	archives
Title IV reapplication (1999)		5 years	archives
Volunteer Center	AF	5 years	archives
Withdrawal studies		10 years	archives
Women's College Coalition survey		5 years	archives
Library			
Annual report		5 years	destroy
Book orders		5 years	destroy
Budgets		10 years	destroy

Invoice copies		10 years	destroy
Periodical information		while active	destroy
Personnel records		while active	destroy
Phillips library files		permanent	permanent
Reserved book lists		2 semesters	destroy
Registrar			
Academic records/transcripts		permanent	permanent
Address change forms		1 year	destroy
Audit a course forms		5 years after graduation or lda**	destroy
Change of major/minor		1 year	destroy

Change of status/withdrawal/loa		5 years after graduation or lda**	destroy
Class lists		permanent	permanent
Drop/Add course forms		2 years after submission	destroy
Grade change forms		permanent	permanent
Grade sheets		permanent	permanent
Graduation Applications and Degree Audits		5 years after graduation or IDA	destroy
Graduation list		permanent	permanent
Master class schedules		permanent	permanent
Name change		permanent	permanent
Off campus study approvals		5 years after graduation or IDA	destroy
Pass/fail application		5 years after graduation or IDA	destroy
Record inspection requests		5 years after graduation or IDA	destroy
Record release requests		1 year after submission	destroy
Registration for course forms		2 years	destroy
Room schedules		1 year	destroy
Student files (application, acceptance, transcripts, etc.)		at graduation or 5 years after termination	destroy
Transcript requests (official and unofficial)		1 year after submission	destroy
Transcripts from other colleges for transfer of credits		5 years after graduation or termination	destroy
University catalogs		permanent	permanent
Veterans file		3 years after termination of enrollment	destroy

Withdrawal from course forms		2 years	destroy
Note: ** IDA refers to "last day of attendance"			
Director of Retention Initiatives			

Academic Advisor's Handbook/Website		While active	archives
CASAS actions		5 years or graduation	destroy
Disciplinary file		5 years	destroy
Student Accessibility Services			
ADA accommodation files for students with disabilities		7 years after graduation	destroy
Vice President, Strategic Enrollment Management			
Admissions			
Financial aid files for enrolled students		3 years after separation	Destroy
I20 related documents for enrolled students		3 years after separation	Destroy
Non-Enrolling Applicant Documents		1 year	Destroy
Procedure Manuals		Current	Archive
Regulations Governing Admissions		Current	Destroy
Financial Aid			
Audits-federal and internal		3 years from the end of the award year in which the report was submitted	destroy
Fiscal operations report (FISAP)		3 years from the end of the award year in which the report was submitted	destroy
Perkins records		Until paid in full	destroy
Promissory notes		Until paid in full	destroy
Student Files		3 years from the end of the award year in which the student last attended	destroy

Third party contracts		3 years	destroy

Executive Vice President, Finance and Administration			
Business Office			
Accounts Payable Invoices/Requests		7 years	destroy
Audit Work papers		7 years	destroy
Bank Statements		7 years	destroy
Budget Work papers		7 years	destroy
Cancelled Checks		7 years	destroy
Cash Receipts Backup		3 years	destroy
Deposit Slips		7 years	destroy
Financial Statements		permanent	archives
General Ledger		permanent	archives
Journal Entry Documents		7 years	destroy
Payroll Reports and Backup		7 years	archives
Student Accounts Receivable Files		7 years after final payment	destroy
Tax Returns		permanent	archives
Time Cards		7 years	destroy
Trial Balance		permanent	archives
Unclaimed Property Files		5 years after reporting to State	destroy
W-2s		7 years	destroy
1099s		7 years	destroy
Environmental Health and Safety			
Administration/Occupational Health Program (OSHA)			

Occupational Accident/Injury/Illness Records **-** Employee and student employee reports resulting from work-related accidents, injuries or illnesses. Accident injury investigations including photos (where applicable). **NOTE**: Only work-related accidents are reported to OSHA.		5 years	Destroy - *OSHA 29 CFR 1910.120*
Non-Occupational Accident/Injury/Illness Records - Employee, student and visitor reports resulting from nonwork-related occupational accidents, injuries or illnesses: Accident Injury Investigations, including photos (where		2 years	Destroy - OSHA 29 CFR 1910.120

applicable). **Note**: Only work-related accidents are reported to OSHA.			
Inspection Records-Facility - Air Sampling/Bulk Sampling Studies, Asbestos Records, Facility Inspection Checklists (includes laboratories), Exposure Assessments, Indoor Air Quality Studies		permanent	permanent - OSHA 29 CFR 1910.120
Inspection Records-Internal - Biological safety cabinet assessments, exposure values for chemicals, fume hood surveys, lab assessments		permanent	permanent - OSHA 29 CFR 1910.120
Material Safety Data Sheets (MSDS)-OSHA - Data sheets for all chemicals used on campus		permanent	permanent - OSHA 29 CFR 1910.120
Occupational Health Program Records-OSHA - Medical records related to exposure or possible exposure to hazardous or toxic substances including testing (required physicals, immunizations and other exams for employees and student employees under OSHA Guidelines).		permanent	permanent - OSHA 29 CFR 1910.120

Training OSHA Sign Up Sheets-Employee - Completed sign-up sheets for required OSHA training		Retain for 30 years after employee leaves and then destroy	Retain for 30 years after employee leaves and then destroy
Environmental Health/Compliance			
Chemical Waste Disposal Records - Manifests, disposal records, orphan chemical records, chemical analysis, EPA reports etc. **NOTE**: A MS Access database has been used since 2000 to track chemical waste disposal information.		permanent	permanent - Resource Conservation and Recovery Act
EPA-required training - Spill Prevention Control & Couate measures; Resource Conservation & Recovery Act. This series includes sign-up sheets that lists names of employees trained, dates of training and type of training received.		Retain for 30 years after employee leaves and then destroy	Retain for 30 years after employee leaves and then destroy. *Clean Water Act and Resource Conservation and Recovery Act*

NOTE: Current training required by the Resource Conservation and Recovery Act is internet-based.			
Hazardous Material Spills/Release		permanent	permanent - *Comprehensive Environmental Response, Compensation and Liability Act*
Inspection Records-Regulatory Agencies		3 years	destroy
Facilities			
Environmental Health/Compliance			
EPA Registration Permit Records - Infections waste, underground storage tanks, air, storm water		Retain for not less than 10 years	Retain for not less than 10 years. OAC 3745-81-33

Underground Storage Tanks - Closure reports, corrective actions, compensatory boards.		permanent	permanent
Finance & Administration			
Any change order, contract increase		7 years after the disposal of the building	destroy
Appeal information		2 years	destroy
Architectural, engineering and construction contracts		7 years after the disposal of the building	destroy
Architectural plans and modifications or specifications		3 years after move	archives
Board of Trustees orientation material		4 years	destroy
Bond financing documents		3 years	archives
Budget Committee material		permanent	permanent
Budget data		7 years	permanent
Building repair and capital project work log		permanent	permanent
Campus facilities master plan		retain until new master plan	archives
Campus facilities master plan, supporting documentation		retain until new master plan	destroy
Chronology file of all correspondence		4 years	destroy
Contracts		while active, then 6 years	destroy

Daily patrol report, call log, and buildings/grounds check list		3 years	destroy
Deferred maintenance report		permanent	permanent
Department of Health reports		3 years	destroy

Departmental Correspondence		3 years	destroy
Divisional Annual Report		permanent	permanent
Drawings for buildings (architectural, mechanical, etc.)		permanent	permanent
Duplicating job requests		3 years	destroy
Duplicating statistics, fall and spring semesters		3 years	destroy
Employee Right to Know Report		30 years	destroy
Facilities usage correspondence		3 years	destroy
Faculty compensation files		update	permanent
Finance, Physical Plant & Technology committees' minutes		permanent	permanent
Fire and fire alarm reports		3 years	destroy
General operating procedures		updated annually	permanent
Grant applications and requests for reimbursement		7 years	destroy
Incident reports (administration and staff)		5 years	destroy
Inspections reports		3 years	destroy
Insurance material and coverage data		update	permanent
Maintenance, cleaning, and training procedures		as updated	destroy
Middles States data		update	permanent
Motor vehicle accident file		6 years	destroy
Motor vehicle violation file		3 years	destroy
Municipal and State Police crime statistics		3 years	destroy
Organizational charts		updated annually	permanent

Original invoices from architect, engineer and contractor		7 years after the disposal of the building	destroy
Recycling reports and procedures		update annually	permanent
RFP's for architectural, engineering and construction services		7 years after the disposal of the building	destroy
Security correspondence		3 years	destroy
Security, Student Right to Know Report		4 years	destroy
Student Right to Know (crime statistics)		4 years	destroy
Supply inventory report		3 years	destroy
Technology master plan		update	permanent
Title related data (ownership, leasehold interest, etc.)		permanent	permanent
Towed vehicle information		2 years	destroy
Vehicle check-in log		3 years	destroy
Visitor sign-in sheet		3 years	destroy
Warranty files		length of warranty, then 3 years	destroy
Work order requests		3 years after completion	destroy
Human Resources			
Background Checks/ reports		6 years	destroy
Benefit files		10 years	archives
Benefit plan information material		5 years	destroy

Court Orders		permanent	archives
DOL and IRS plans and notices		permanent	archives
Employee Benefit/ medical files (fmla, LOA, STD. LTD)		10 years	archives
Employee Personnel Files		permanent	archives

Forms W-4 and A-4		permanent	archives
I-9 forms		3 years after date of hire or one year after term	destroy
Injury logs / records summary		5 years following year created	destroy
Instructional material		current	destroy
Plan Administrator records		permanent	archives
Salary data (Earning records, paychecks, payroll records and files		7 years	archives
Selection and hiring records (applications, resumes, search material		2 years after position filled	destroy
W-2 forms		10 years	destroy
Information Systems			
Academic Computing equipment reservation forms		2 years	destroy
Administrative Computing Users Group minutes		3 years	archives
Computer Lab reservation forms		3 years	destroy

E-mail* (All steu mail is stored in Google Vault for 10 years		10 years in department	destroy
Formal vendor proposals		1 year	destroy
Formal vendor proposals		Backed up nightly & weekly. Three months backup offsite.	All data retained indefinitely
Information Systems Policies		while current + 4 years	Review for historical value before deleting
Lucent Technologies project documentation		4 years	archives
RFP, RFQ, etc vendor responses		3 years	destroy
Service and maintenance contracts		1 year after completion	destroy

Strategic Plan for Technology		while current + 4 years	Review for historical value before deleting
System Power FAIDS (Financial Aid System)		Backed up nightly & weekly. Three months backup offsite.	All data retained indefinitely
System: Raiser's Edge (CRM & Development System		Backed up nightly & weekly. Three months backup offsite.	All data retained indefinitely
Telephone requisition forms		1 year	destroy
Vice President, Institutional Advancement			
Academic Advancement			
Assessment		7 years	archives
Capital Campaign		7 years	archives
Committee meeting notes		5 years	destroy

Department meeting notes		5 years	destroy
Faculty meeting notes		5 years	destroy
Grant proposals		5 years	archives
Grant proposal acceptances		5 years	destroy
Grant proposal denials		5 years	destroy
International exchange		5 years	destroy
Internal recruiting		5 years	destroy
Middle States Association correspondence		7 years	Forward to Provost
Program announcements		5 years	destroy
Communications & Marketing			
Advertising book		3 years	destroy
Advertising log		3 years	destroy
Faculty information card		While actively engaged	archives
Faculty/administration/staff file		While actively engaged	archives
News release book		3 years	destroy
News release log		3 years	archives

Photo/slide files		5 years	archives
Student information card		While enrolled	destroy
Institutional Advancement			
Alumnae/i correspondence and files		permanent	permanent
Check/stock/bond/letter or card of intent copies		4 years	destroy
Christmas gift list		5 years	destroy
Foundation records		permanent	permanent

Scholarship agreements & files		permanent	permanent
Solicitation samples		10 years	archives
Thank you response letters		3 years	destroy
Publications			
Job request form		3 years	destroy
Printing log		7 years	destroy
Publications file		5 years	archives
University Relations			
Awards made by the University		2 years	archives
Congratulatory messages received by the University		1 years	archives
Gifts and contributions made in the name of the University		3 years	destroy
Dean, Student Life			
Athletics			
Athletic Event files/contracts		2 years	destroy
NCAA / Compliance records		7 years	destroy
NCAA Infraction and case files		7 years or length of sanction	destroy
Medical information-athletes		7 years	destroy
NCAA Incident forms-athletes		5 years or graduation	destroy
Insurance information-athletes		7 years	destroy
Officials contracts		2 years	destroy
Athletic Contest scores and statistics		permanent	copy to archives
Sport Specific Rosters		permanent	copy to archives

Conference Paperwork / Records		6 years	copy to archives
Coaches Information		length of employment	archives
Athletic department handbook (NCAA)		5 years	archives
Campus Ministry			
Baccalaureate Mass Program		5 years	archives
Club files		5 years	destroy
Liturgical files		5 years	destroy
Program files		5 years	destroy
Sacramental preparation records		5 years after graduation	destroy
Career Services/Study Away			
Career Closet Policy & Procedure Manual		Permanent	Permanent
Internship Records		1 Year after graduation	destroy
Mentoring Records		1 Year after graduation	destroy
Study-away Records (approvals/budget/contracts/health forms/waivers)		3 years after program completion	destroy
Counseling Center			
Student counseling files		10 years after graduation	destroy
Health Center			
Immunization records		10 years	destroy
Incident reports (other than OSHA)		10 years	destroy
Students health records		10 years	destroy

Annual CLIA/CLIS license, proficiency testing and quality control testing		2 years from date of reporting	destroy
Residence Life			
Community Assistant manual		Annual and ongoing review and revisions, with new versions superseding prior versions	permanent
Facilities information		4 years	destroy

Guest sign-in log		4 years	destroy
Incident disposition		7 years from last term of enrollment, except when expulsion was the final outcome	Destroy unless outcome was expulsion in which case the file is permanently retained.
Incident reports		7 years from last term of enrollment, except when expulsion was the final outcome	Destroy unless outcome was expulsion in which case the file is permanently retained.
Conduct files		7 years from last term of enrollment, except when expulsion was the final outcome	Destroy unless outcome was expulsion in which case the file is permanently retained.
Occupancy roster		4 years	destroy
Personnel files-CAs		1 year after employment or graduation	destroy
Evacuation drills		4 years	destroy
Housing Contracts		1 year post graduation or last date of attendance	destroy
Emergency /missing person contact information for resident students		Updated annually while living on campus	destroy

Student Employment			
Employment application-student		Duration of employment	destroy
Federal Work Study application-off campus		4 years after graduation or last date of attendance	destroy
Federal Work Study application-on campus		4 years after graduation or last date of attendance	destroy
Federal Work Study payroll records		4 years after graduation or last date of attendance	destroy
Graduate Assistant files (references/resumes/evaluations)		1 year after graduation or last date of attendance	destroy
Job descriptions – student positions		Permanent	Permanent
Supervisor evaluation		1 year post-employment	destroy
Timesheets – students		4 years after last date of attendance	destroy

Work agreements - student		4 years after graduation or last date of attendance	destroy
Student Engagement			
Annual Report of Activities		5 years	destroy
Campus Activities Board Information		1 year	destroy
Club budgets		5 years	destroy
Constitutions for student clubs		permanent	Archives
Contracts-DJs/speakers/entertainment		5 years	destroy
Orientation program files		3 years	Archives
SGA Records		5 years	Archives
Waiver forms		1 year post-event	destroy

Volunteer Center			
Community agency information		permanent	permanent
Immersion Program Records/waivers		5 years	destroy
Project files		5 years	destroy
Service-Learning Records		5 years	destroy
Van file-maintenance/registration/insurance		permanent	permanent
Van Waivers		1 year after use	destroy
Volunteer Placement Information		4 years	destroy
Dean of Student Life			
Annual reports from SL departments		5 years	destroy
Contracts		7 years after all obligations end	destroy
Court Orders (student related)		permanent	permanent
Divisional Annual Report		5 years	destroy
SGA Accounts (budgets/check requests)		7 years	destroy
SGA bank statements & reconciliations, voided and cancelled checks		7 years	destroy
SGA records of funds deposited (bank deposit slips, invoices etc.)		7 years	destroy
Student Handbook		annual and ongoing review and revisions, with new versions superseding prior versions	Copy to archives (print & electronically)