



University of California's Records Retention Schedule

Laurie Sletten, CRM, CA
Records Retention Schedule Manager
UCOP Information Technology Services

August 13, 2013

Key Topics

- A brief overview of the schedule update project
- What the updated schedule looks like and why it is different
- How to use the new database

A brief overview of the schedule update project

Records Retention Schedule

- **Records Retention Schedule:** A document that identifies records and establishes a timetable for their disposition.
- **UC Records Management Committee:** Establishes the University records retention schedule, in consultation with functional managers, senior university management, and the Office of the General Counsel.
- **Membership:** Each campus has a representative on the RMC.

Records Management Committee

First Name	Last Name	Location	Phone	Email
Catherine	Montano	ANR	(510) 987-0103	catherine.montano@ucop.edu
John	Stoner	LBNL	(510) 486-6399	JWStoner@lbl.gov
Liane	Ko	UCB	(510) 664-4615	lianeko@berkeley.edu
Lynette	Temple	UCD	(530) 752-3949	lstemple@ucdavis.edu
Stephanie	Tenney	UCI	(949) 824-3454	sktenney@uci.edu
Scott	Monatlik	UCLA	(310) 794-6724	smonatilk@finance.ucla.edu
Sonia	Johnston	UCM	(209) 228-4412	sjohnston@ucmerced.edu
Russell	Lewis	UCR	(909) 787-3009	russell.lewis@ucr.edu
Tessa	Mendez	UCSB	(805) 893-7025	tessa.mendez@vadmin.ucsb.edu
Eloise	Cameron	UCSC	(831) 459-2983	elcamron@ucsc.edu
Paula	Johnson	UCSD	(858) 534-2552	pjohnson@ucsd.edu
Brenda Gee	DePeralta	UCSF	(415) 476-4317	bgee@chanoff.ucsf.edu

Records Retention Schedule

- **UC's schedule was outdated:**
 - Included obsolete records and excluded current records
 - Did not address current technology or UC's interest in security and privacy
 - Kept some records too long and others not long enough

Records Disposition Schedules Manual

The Records Disposition Schedules Manual provides time periods for retaining and disposing of University records. Please contact your local [Records Management Coordinator](#) with questions about records disposition.

The Associate Vice President for Information Technology Services has Universitywide policy responsibility for records and information practices, including this disposition schedules manual and the [Records Management and Privacy \(RMP\) series](#) of the Business and Finance Bulletins.

Introduction

[University Statement on Ownership of Administrative Records \(RMP-1\)](#)

[UC Records Management Coordinators](#)

Records Disposition Schedules Manual (Classified by Functions)

- [Explanations and Symbols](#)
- [Searchable Format](#)

I. Administrative

A. Agreements +

B. Applications and Requests

C. Certificates, Licenses, Permits, Registrations, and Warrantees

D. Contracts, Grants, and Agreements (Extramural) for Research, Training, and Public



Search

Enter search parameters in one or more of the search fields, or choose Find All to see all records. To find a single record by its number, enter it in the Record Number field and choose Start Search. To find all record numbers that contain those digits, choose Find All.

Function:	Select one
Record Category:	Select one
Record Name:	Administrative
Record Office:	Auxiliary & Service Enterprises
Record Number:	Fiscal
	Library
	Medical
	Payroll/Personnel/Benefits
	Physical Plant
	Police
	Student & Applicant

[Return to Home Page](#)



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Enter search parameters in one or more of the search fields, or choose Find All to see all records. To find a single record by its number, enter it in the Record Number field and choose Start Search. To find all record numbers that contain those digits, choose Find All.

Function:	Select one <input type="button" value="v"/>
Record Category:	<input type="text"/>
Record Name:	Computer
Record Office:	<input type="text"/>
Record Number:	<input type="text"/>

Start Search

Find All

Reset this form

[Return to Home Page](#)

Displaying 0 to 12 of 12 records found.

Record Name	Record Category	Years To Retain		Record Office	Record
		Record Copy	Other Copy		
Computer Facilities, Request for	Admin: Applications, Requests	0-5	0-5	Department	24
Computerized Printout of Alumni & Donor Profile	Admin: Gifts, Endowments, Private Grants	Until superseded	0-1	Development & Alumni Office	78
Campus Computer Center Computer Utilization Report	Enterprise: Computer Center	0-7 then to Archives	0-7	Computer Center	218
Campus Computer Center Personnel Report	Enterprise: Computer Center	0-5	0-5	Computer Center	219
Revenue from Instructional Use of Computers - 12 month Period	Enterprise: Computer Center	0-7	0-7	Computer Center	221
Budget Reports - Computer Generated Control/Master Files and Edit	Fiscal: Budget and Budget Control	0-1	---	Campus Budget; Accounting	361
Budget Reports - Computer Generated Control/Master Files and Edit-Transaction Lists	Fiscal: Budget and Budget Control	0-5	---	Campus Budget; Accounting	362
Financial Aid - Status Reports (computer generated)	Student & Applicant: Financial Aid	1	---	Financial Aid	1543
Fund Summary Reports (computer generated)	Student & Applicant: Financial Aid	1	---	Financial Aid	1544
Financial Aid Award Reports (computer generated)	Student & Applicant: Financial Aid	1	---	Financial Aid	1545
Library Computer Request Form	Library: Circulation	1	---	Library	1607
Library Computer Search Worksheet	Library: Circulation	1	---	Library	1608



University of California Records Disposition Schedules Manual

Record Detail

Record Name: Revenue from Instructional Use of Computers - 12 month Period

Record Number: 221

Function: Auxiliary & Service Enterprises

Record Category: Enterprise: Computer Center

Record Office: Computer Center

Disposition Record Copy: 0-7

Disposition Other Copy: 0-7

Vital:

CG:

Comments:

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Record

Type or

Number	Record Title or General Description	Office of		DISPOSITION SCHEDULE IN YEARS
		Record	Record Copy Other Copy	

I. ADMINISTRATIVE

A. AGREEMENTS

Athletic Agreements (See Sec. II.E,
Intercollegiate Athletics)

G	Broadcasting Agreements (radio, TV, etc.)	Executing Office	3-5 following	1 following expiration
	expiration			
G	Charter & Transportation Agreements (e.g., boats, planes, buses, & bus service)	Executing Office	3-5 following expiration	1 following expiration

Update Project

- Updating the schedule was essential to reduce cost, risk, e-discovery burden; and to enhance administrative efficiency.
- The RMC advocated for an update to the schedule and a position at UCOP to work on the update for the committee.
- The RMC's Executive Committee developed the position description and participated in the selection.
- ITS hired me to lead the update project.
- In May 2012, I started a two-year contract position.

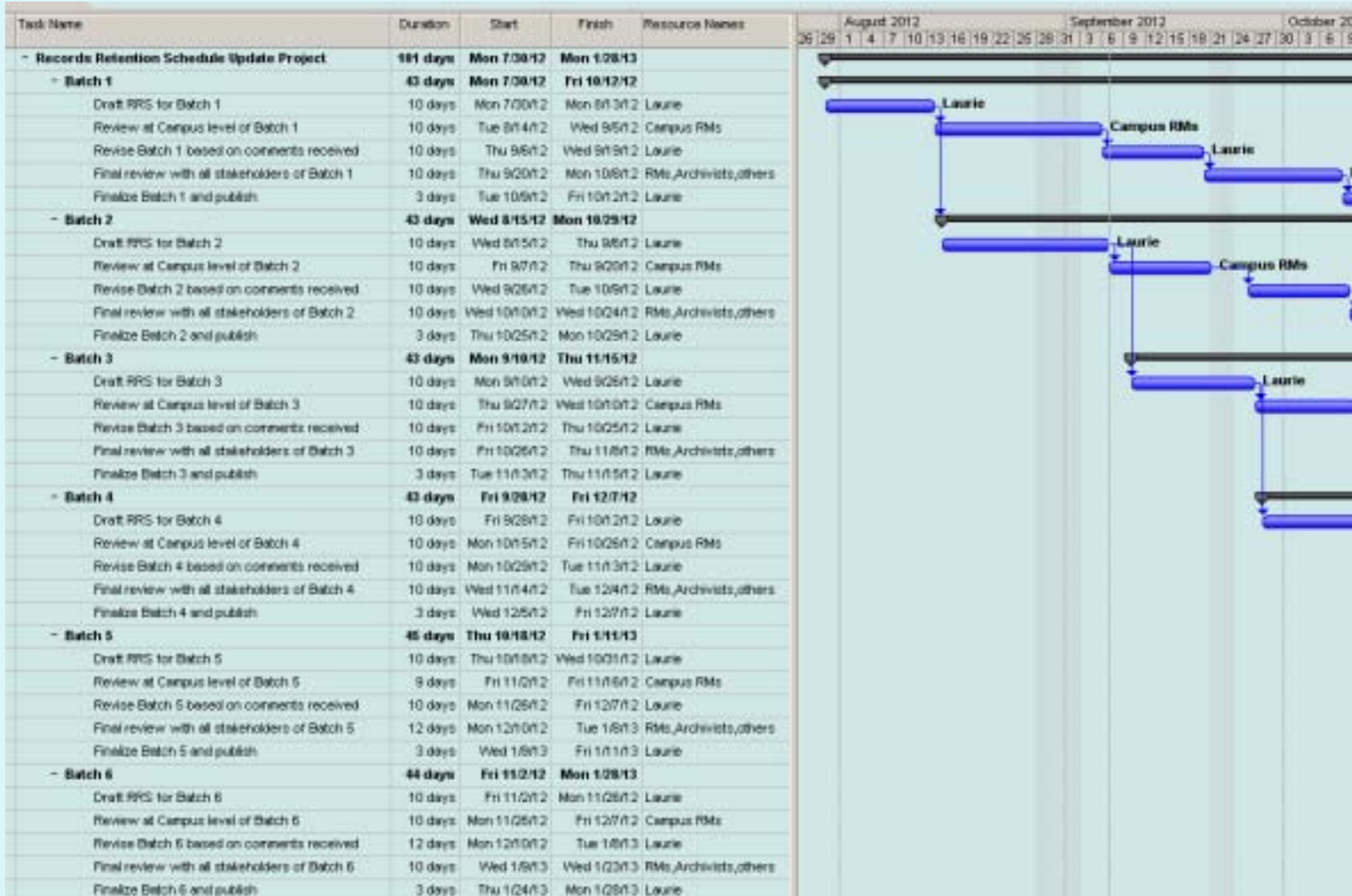
Batches

Records were grouped by function to help facilitate the scheduling process.

Batch	Function
1	General Routine Office Transitory Records
2	Program Administration Records
3	Payroll and Benefits Records
4	Human Resources
5	Human Resources
6	Financial Records
7	Financial Records
8	Capital Resources and Physical Plant Records
9	Compliance Records
10	University Police Records

The Plan

- We developed a plan and timeline.



The Process

- I drafted a schedule for the records batch.
- I sent it out for comment to RMC and stakeholders.
- Based on comments, I revised the schedule and returned it for additional review.
- Another opportunity for revision and comment.
- I finalized the schedule and sent it out for final review/approval.
- An aggressive schedule: Each step was to be 10 working days.

Timeline

Batch/Function	REVIEW PERIOD													
	12-Jul	12-Aug	12-Sep	12-Oct	12-Nov	12-Dec	13-Jan	13-Feb	13-Mar	13-Apr	13-May	13-Jun	13-Jul	13-Aug
General Routine Office Transitory Records	Green	Green	Green	Green	Green	Green	Green	Green	Green	Green				
Program Administration Records		Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow	Yellow					
Payroll and Benefits Records			Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange	Orange			
Human Resources			Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red	Red
Financial Records						Red	Red	Red	Red	Red	Red	Red	Red	Red
Capital Resources Records									Purple	Purple	Purple	Purple	Purple	Purple
Compliance Records									Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue	Dark Blue
Public Safety Records												Blue	Blue	Blue
Academic Personnel Records												Light Green	Light Green	Light Green
IT Records														
Technology Transfer Records														
Academic Department Records														
Budget Records														
Development Records														
Student Records														
Other Records														

Where we have been . . .

Timeline

REVIEW PERIOD										
Batch/Function	13-Aug	13-Sep	13-Oct	13-Nov	13-Dec	14-Jan	14-Feb	14-Mar	14-Apr	14-May
General Routine Office Transitory Records										
Program Administration Records										
Payroll and Benefits Records										
Human Resources										
Financial Records										
Capital Resources Records										
Compliance Records										
Public Safety Records										
Academic Personnel Records										
IT Records										
Technology Transfer Records										
Academic Department Records										
Budget Records										
Development Records										
Student Records										
Other Records										

Possible other batches?
Communications
Collections Records (Libraries, Museums, Archives, Special Collections)
Research Records
Medical Center Records
Lab Records
Risk Management

Where we are going . . .

The Process continues for more updates

- I draft a schedule for the batch.
- Draft goes out for comment from a core group of RMC & stakeholders involved in the draft.
- Based on comments, I revise, send to RMC, who gather comments from their stakeholders.
- Another opportunity for revision and comment.
- I finalize, send out for final review/approval.
- Aggressive schedule: Each step =10 working days, when possible.

Records Appraisal:

- Administrative value - how long does the office need the records for their day-to-day requirements?
- Fiscal value – are the records needed for any financial audits, what organization is doing the audit, and what is their audit cycle?
- Legal value – what are the possible legal issues, and laws/regulations that govern these issues, such as "causes of actions" for "statutes of limitations“?
- Historical value - Archivists weigh the significance of records in terms of our mission; past, current, and future research interests; and other records found in the archives.

What the updated schedule looks
like and why it is different

The screenshot shows a web browser window with the URL recordsretention.ucop.edu. The page header includes the University of California logo and the title "Records Retention Schedule". The main content area is divided into a left sidebar and a main body. The sidebar contains sections for "SEARCH THE SCHEDULE" (with a search box and button), "BROWSE THE SCHEDULE" (with a "Browse by Category" link), "ACCESS THE FULL SCHEDULE" (with "Full Schedule" and "Print Full Schedule" links), and "RESOURCES" (with links for "Retention Schedule FAQs (PDF)", "Retention Schedule Glossary (PDF)", "Contact", and "Home"). The main body features a "About the Schedule" section with a paragraph explaining the schedule's purpose and a "Schedule update project" section. Below these are sections for "Records included in the schedule" and "The schedule does not apply to", both containing bulleted lists of applicable and non-applicable records. The footer contains navigation links for "Records Management", "Information Technology Services", and "UCOP", along with copyright information for 2013 and a note about browser compatibility.

UNIVERSITY OF CALIFORNIA **Records Retention Schedule**

SEARCH THE SCHEDULE

Search

BROWSE THE SCHEDULE

[Browse by Category](#)

ACCESS THE FULL SCHEDULE

[Full Schedule](#)
[Print Full Schedule](#)

RESOURCES

[Retention Schedule FAQs \(PDF\)](#)
[Retention Schedule Glossary \(PDF\)](#)
[Contact](#)
[Home](#)

About the Schedule

Knowing what records to keep and for how long is challenging. A records retention schedule defines the period of time that records should be retained and when they should be destroyed. Various requirements based in law and university policy govern the retention of administrative records. A retention schedule is critical for promoting responsible records management, mitigating risk, and ensuring consistent compliance across UC. The University Records Management Committee (RMC) is charged with developing and maintaining the universitywide records retention schedule. Questions regarding the schedule should be directed to the appropriate [campus Records Management Coordinator](#).

It is important for all members of the University community to adhere to the retention periods in the schedule (except in the cases of a records hold). The schedule serves as the lawful authorization for the disposition of records; consequences of not following the schedule may include court-imposed legal sanctions.

Schedule update project

The RMC currently is conducting a systemwide project to update the records retention schedule. See [Schedule Update Project](#) for more information.

Records included in the schedule

Per University policy, RMP-1, "University Records Management Program," and except as superseded by federal laws and regulations, and university contracts, the retention schedule applies to all administrative records, regardless of their medium, owned by the

- University of California campuses and the Office of the President,
- University of California health sciences centers, and
- Department of Energy laboratories managed by the University of California.

The schedule does not apply to

- Administrative records held by the Principal Officers of The Regents,
- Teaching and research records (e.g., library materials, faculty research and teaching materials, student examinations), or
- Records pertaining to individual patient care (medical records).

[Records Management](#) | [Information Technology Services](#) | [UCOP](#)
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Best viewed with Mozilla Firefox, Google Chrome, Safari and IE9

Search Results:

The items from the existing schedule that have not been superseded are in this database.
New items have a * after the number.

437 records found for ""

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period	Retention Rule	Comments
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...		routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
0002A*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	A. Program administration records of enduring historical value	A. Program administration records of enduring historical value are those significant records that more...		academic plans, long range development plans, policy, acknowledg...	Official Record: Permanent, subject to University Archives review. Coordinate the transfer of more...	Permanent records	View
0002B*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	B. Operational program administration records	Operational program administration records do not have enduring historical value, but serve to more...		letters, acknowledg... memos, notes, transmittals, e-mail messages, demonstrate ...	Official Record: Retain records 5 years after the end of the fiscal year in which the records are more...	Delete or destroy after the retention period has lapsed	View
0003A1*	3. Payroll and Benefits Records	Payroll and Benefits Records document the payroll and non-retirement benefits processes	A. Employee Withholding/D... Authorizations and Individual Payroll Earnings Records	Employee Withholding/D... Authorizations and Individual Payroll Earnings Records document the more...	A. 1. Non-Retirement Benefit Election or Enrollment Records	employee's withholding allowance certificates, W-4, tax forms, non-resident aliens tax more...	Official Record: Retain records for 50 years after the end of fiscal year in which the records more...	Delete or destroy after the retention period has lapsed	View

Click on hyper-link – specific results

Function:

1. General Routine Office Transitory Records

Function Description:

Transitory records document routine general office activities. In this context the word "routine" means activities related to the typical internal operation of an office, including: staffing, administrative procedures, systems, and communications. They do not serve as documentation of the establishment of unique programs, functions, units, or a campus, nor record fiscal obligations to demonstrate accountability or document important historical decisions of the University.

Category:

1. General Routine Office Transitory Records

Category Description:

Transitory records document routine general office activities. In this context the word "routine" means activities related to the typical internal operation of an office, including: staffing, administrative procedures, systems, and communications. They do not serve as documentation of the establishment of unique programs, functions, units, or a campus, nor record fiscal obligations to demonstrate accountability or document important historical decisions of the University. Transitory records, found in all formats (paper, electronic, or otherwise) may include but are not limited to:

- internal information records, such as office and travel schedules, memoranda, and routine internal reports, reviews and plans, used to disseminate information or for other administrative purposes;
- ordinary, commonplace communications found in letters, acknowledgements, memos, notes, postcards, transmittals, voice-mail messages, e-mail messages and other routine messages, regardless of media;
- office support records, such as procedures to operate routine office equipment e.g. phones, fax machines, photocopiers, and logs and internal requests for the use of office/facilities space and equipment;
- administrative committees' members' records when the member is not the official record keeper for the committee;
- unsolicited job applications and resumes;
- documentation of the day-to-day administration and training of office personnel;
- records of supplies and office services;
- records and documentation of unit activity relating to specific and defined short-term administrative projects;
- source documents used for data input only, after input has been verified; and
- source documents that have been scanned, after the record created from the scan has been verified as accurate and stored in a proper recordkeeping system. The scanning process must meet authentication standards to assure the records' integrity, reliability and trustworthiness. Some source documents may need to be retained, even after scanning if required by law or agency regulations, for example wet-signature promissory notes, oaths, patents, etc. The documentation of the scanning process is not a transitory record and must be retained for as long as the converted record is retained. See the comments section for more information on scanning and recordkeeping systems.

The value (usefulness) of these routine facilitative records is short-lived and therefore their retention period is minimal.

Sub-Category Title:

Keywords:

routine internal reports, routine internal reviews, routine internal plans, letters, acknowledgements, e- mail messages, routine messages, office support records, logs, internal requests, administrative committees members records, unsolicited job applications, supplies, office services, routine projects, source documents, data input records, scanned documents, acknowledgement, administrative procedures, correspondence, email, e-mail, Fax, general correspondence, informal letter, internal correspondence, internal letter, internal notes, internal plans, internal reports, internal reviews, letter, memo, memorandum, memos, messages, notes, office administration, office equipment, office personnel training, office procedures, Office Schedule, office schedules, office supply, office supply inventory, phone logs, postcards, routine procedures, source documents for data input, source documents for scanning, staffing, supply records, telephone logs, transitory email, transitory records, transmittals, travel schedules, unsolicited resumes, voice mail messages, voice-mail

Category Description	Sub-Category Title
----------------------	--------------------

Transitory records document routine general office activities. In this context the word "routine" [more...](#)

Program administration records of historical value those significant records [more...](#)

Employee Holding/D...
 Authorizations
 Individual
 Roll Earnings

A. 1. Non-Retirement Benefit Election or Enrollment Records

Record Code:
0001*

Functional Category:

1. General Routine Office Transitory Records

Comments:

Records created from scanned source documents must be verified and documented as accurate following the imaging process. Thereafter, the source records may be destroyed unless prohibited by law or agency regulations. The created records must be retained in a proper recordkeeping system for their retention period. The documentation of the scanning process is not a transitory record and must be retained for as long as the converted record is retained.

Some agencies have very specific requirements for retaining source documents and for how imaging must be done. These agencies include but are not limited to FAR, IRS, FDA, and DHS. If required by law or agency regulations, source documents must be kept, even after having been scanned, for example wet-signature promissory notes, oaths, patents, etc. If records governed by an agency are scanned, agency requirements for imaging processes must be met.

A proper recordkeeping system is one that meets University of California standards for assuring the records are authentic and will retain their integrity, availability, and confidentiality for their lifecycle. Proper recordkeeping includes the collection, organization, and categorization of records to facilitate their preservation, retrieval, use, and disposition, allowing records to be:

- grouped with related records into classifications according to operational needs,
- retrieved easily and in a timely manner,
- retained in a usable format for the required retention period found in an approved records retention schedule, on-going investigation or legal action,
- accessed by individuals who have a need for the records found within the system,
- secured from inappropriate access when the records contain personally identifiable information, restricted or confidential information,
- protected from inappropriate dissemination, modification or destruction, and
- disposed of in accordance with approved retention schedules.

2013-07-11 18:23:40

Retaining transitory records longer than necessary consumes resources required to properly manage records of longer term value.

2013-07-11 18:25:17

Some of these records may have restricted information in them. Records containing restricted information (regardless of media) must be protected from unauthorized access, disclosure and disposition, in accordance with University policy and California and Federal laws. Restricted information includes "Notice-Triggering Information" as defined in UC Business and Finance Bulletin Information Series Policy IS-2: (name plus Social Security Number, driver's license or California identification card number, financial account number with a security code, medical information or health insurance information).

2013-07-28 11:51:02

Since some of these records contain restricted information, creating copies is discouraged. If created, they must be protected from unauthorized access, disclosure and disposition in accordance with University policy and California and Federal laws.

2013-07-29 08:29:44

The Format

- In June 2012, the RMC determined the format for the new schedule, and selected broad buckets for records categories.
- They prioritized work in batches by record type.

Buckets

- Scheduling at broader aggregates or functions.
- Fewer categories from which to choose.
- Functions rarely change.
- New records and systems will fit into a bucket.
- We will be in a better position to implement electronic recordkeeping in the future.

Function	Records
1 Administrative Records	Correspondence, Business
1 Administrative Records	Correspondence, Transitory
1 Administrative Records	Correspondence, Electronic
1 Administrative Records	Correspondence – General or Transitory – e-mail
1 Administrative Records	Transitory records
1 Administrative Records	Administrative Records
2 Administrative Records	Record Keeping

What's new?

- Functional categories
- No office of record
- Maximum retention
- Confidential and vital listings
- Rationale
- Media neutral

Records included in the schedule

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The schedule does not apply to:

Per University policy, RMP-1, the retention schedule does not apply to all administrative records, regardless of their medium, owned by the

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- Records pertaining to individual patient care (medical records).

Are there any circumstances when you should not follow the retention schedule?

Yes, there are several important situations that must be considered:

- If pending, foreseeable, or ongoing litigation; an investigation; or an ongoing audit pertaining to the records is taking place, *the records cannot be destroyed until these actions have been completed or resolved.*

This is called a “Records Freeze”.

Are there any circumstances when you should not follow the retention schedule?

- If a federal or state statute or regulation specifies a longer retention period for any records, the statute or regulation overrides this schedule. Please notify your campus Records Management Coordinator about the requirement. The Records Management Coordinator will work with the RMC to change the schedule.

Are there any circumstances when you should not follow the retention schedule?

- If there is a legitimate business need to retain records longer than the period identified in the retention schedule, please contact your campus Records Management Coordinator to identify the needs. The Records Management Coordinator can also discuss with the RMC to determine if the schedule should be changed.

The RMC will be developing a documented change management process. Please work with your campus records management coordinator as your conduit to the RMC.

How to use the new database

<http://recordsretention.ucop.edu/>

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It is important for all members of the University community to adhere to the retention periods in the schedule (except in the cases of a records hold). The schedule serves as the lawful authorization for the disposition of records; consequences of not following the schedule may include court-imposed legal sanctions.

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University Of California - Rec x

recordsretention.ucop.edu

Google Accounts University Of Californi... RRS tool - backend Google Analytics Offici... Intelligence Events Ov...

UNIVERSITY OF CALIFORNIA Records Retention Schedule

SEARCH THE SCHEDULE

About the Schedule

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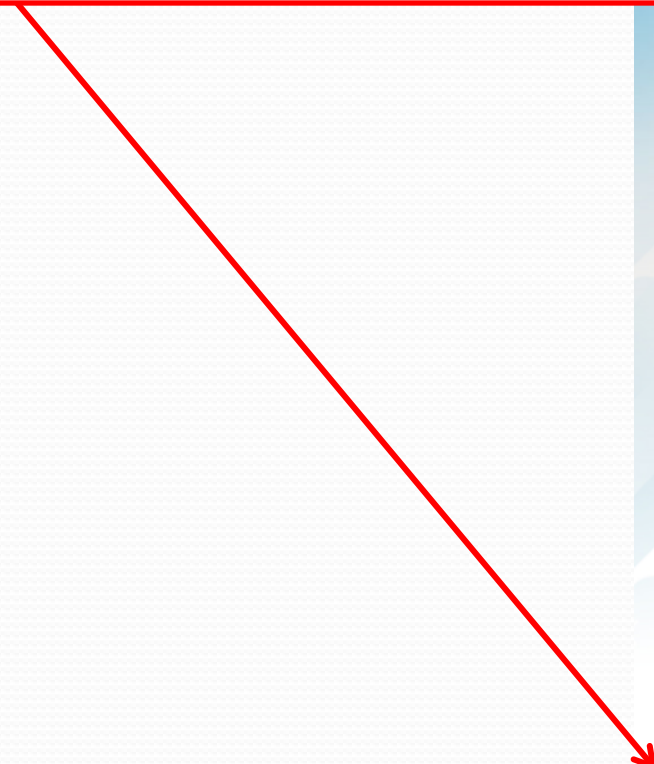
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UNIVERSITY OF CALIFORNIA Office of the President

Jobs | People

HOME MISSION ORGANIZATION INITIATIVES

UCOP > Business Operations > ITS > Initiatives > Records management (systemwide) > Records Management Committee

Information Technology Services

OVERVIEW UNITS SERVICES INITIATIVES POLICIES

Records Management Committee

The University Records Management Committee (RMC) is charged by University policy, [RMP-1](#), "University Records Management Program," with coordinating records management across the University to ensure that administrative records are appropriately managed and preserved, and can be retrieved as needed. The RMC is responsible for guiding University records management and privacy policy, developing and maintaining the universitywide records retention schedule, and developing guidelines and procedures supporting best practices and regulatory requirements.

The committee is composed of the records management coordinator from each campus, the Lawrence Berkeley National Laboratory, Agriculture and Natural Resources, and the Office of the President, as well as four ex-officio members representing the General Counsel of The Regents, the UC Archivists Council, the University Auditor in the Office of the President, and the Chief Financial Officer in the Office of the President. The Associate Vice President for Information Technology Services is responsible for overseeing records management and information practices policy and is chair of the committee.

CONTACT

Email [Laurie Sletten](mailto:Laurie.Sletten@ucop.edu)
Phone: (510) 987-9411

ADDITIONAL INFORMATION

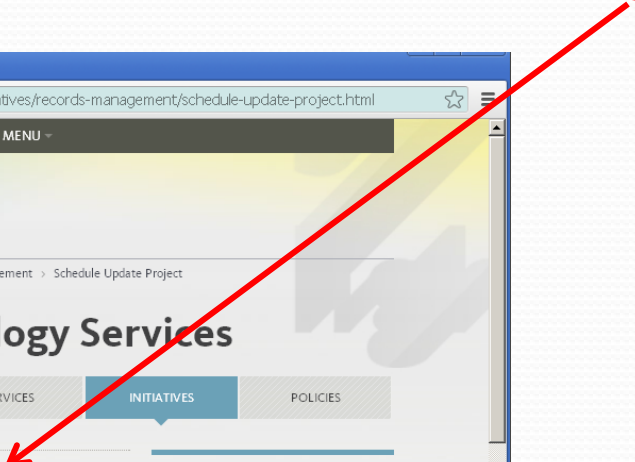
- [UC Records Retention Schedule](#)
- [About the UC Records Retention Schedule](#)
- [Schedule Update Project](#)
- [Records Management Committee](#)
- [RMP Policies](#)
- [Related Committees](#)

Location and Primary Member	Alternate Member
BERKELEY Liane Ko Public Records Coordinator Ethics, Risk & Compliance Services Phone: (510) 664-4615	
DAVIS Lynette Temple Director, Legal Affairs Office of the Campus Counsel Phone: (530) 752-3949	

It is important for all members of the University community to adhere to the retention periods in the schedule (except in the cases of a records hold). The schedule serves as the lawful authorization for the disposition of records; consequences of not following the schedule may include court-imposed legal sanctions.

Schedule update project

The RMC currently is conducting a systemwide project to update the records retention schedule. See [Schedule Update Project](#) for more information.



The screenshot shows a web browser window with the URL www.ucop.edu/information-technology-services/initiatives/records-management/schedule-update-project.html. The page header includes the University of California logo and the text 'Office of the President'. A breadcrumb trail reads 'UCOP > Business Operations > ITS > Initiatives > Records management > Schedule Update Project'. Below this is a navigation menu with tabs for 'OVERVIEW', 'UNITS', 'SERVICES', 'INITIATIVES', and 'POLICIES'. The 'INITIATIVES' tab is selected. The main content area is titled 'Schedule Update Project' and contains several sections: a paragraph about the RMC's initiative, a 'CONTACT' section with email and phone information, an 'ADDITIONAL INFORMATION' section with a list of links, and two sub-sections: 'Schedule update process' and 'Why update the schedule'. A red arrow points from the 'INITIATIVES' tab to the main heading.

Schedule Update Project

The University Records Management Committee (RMC) is leading an initiative to revise the existing schedule to better address the types of administrative records currently in use, to support University compliance with legal and other regulatory retention requirements, and to promote adherence to UC best practices. Questions about the schedule should be directed to the appropriate [campus records manager](#).

Schedule update process

The project was launched in May 2012. A records manager was hired by the Office of the President to lead the project under the RMC's direction.

To determine updated retention periods, the project lead reviews University policies and procedures, researches relevant legal requirements, and meets with functional area experts both to validate the proposed retention period and to determine if other types of records exist that should be included.

The RMC reviews the draft record category descriptions and retention periods, seeks input from campus functional experts, and suggests revisions as appropriate. After several iterations, the RMC approves the text and retention period for a particular category of records, and turns to the next category for discussion and review.

Why update the schedule

The existing records retention schedule is out-of-date. It was developed in the 1980s and includes now-obsolete records yet lacks many new records. It does not appropriately reflect the current business environment, advances in technology and records management practice, or current data privacy and security standards.

In addition, the format of the existing schedule is cumbersome to use. It lists specific records, such as the title of a form, rather than broad categories of

CONTACT

Email [Laurie Sletten](#)
Phone: (510) 987-9411

ADDITIONAL INFORMATION

- [Records Retention Schedule](#)
- [About the Records Retention Schedule](#)
- [Schedule Update Project](#)
- [Records Management Committee](#)
- [RMP Policies](#)
- [Related Committees](#)

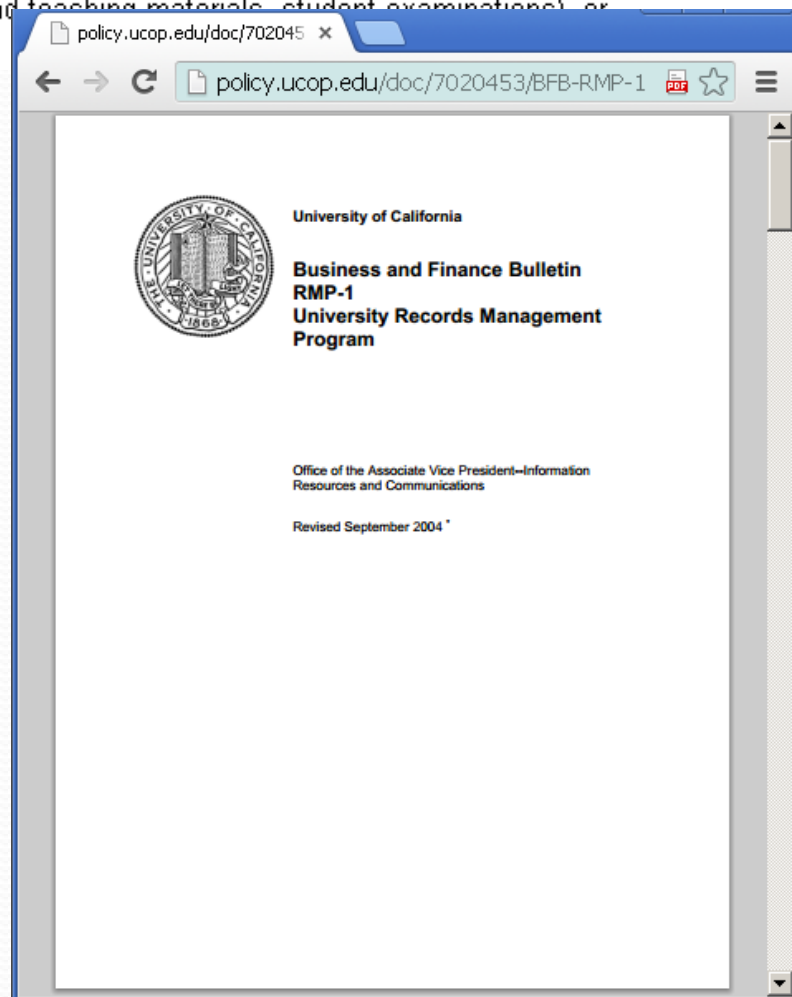
Records included in the schedule

Per University policy, **RMP-1**, "University Records Management Program," and except as superseded by federal laws and regulations, and university contracts, the retention schedule applies to all administrative records, regardless of their medium, owned by the

- University of California campuses and the Office of the President,
- University of California health sciences centers, and
- Department of Energy laboratories managed by the University of California.

The schedule does not apply to

- Administrative records held by the Principal Officers of The Regents,
- Teaching and research records (e.g., library materials, faculty research and teaching materials, student examinations), or
- Records pertaining to individual patient care (medical records).



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About the Schedule

Knowing what records to keep and for how long is challenging. A records retention schedule defines the period of time that records should be retained and when they should be destroyed. Various requirements based in law and university policy govern the retention of administrative records. A retention schedule is critical for promoting responsible records management, mitigating risk, and ensuring consistent compliance across UC. The University Records Management Committee (RMC) is charged with developing and maintaining the universitywide records retention schedule. Questions regarding the schedule should be directed to the appropriate [campus Records Management Coordinator](#).

It is important for all members of the University community to adhere to the retention periods in the schedule (except in the cases of a records hold). The schedule serves as the lawful authorization for the disposition of records; consequences of not following the schedule may include court-imposed legal sanctions.

Schedule update project

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Records included in the schedule

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- Records pertaining to individual patient care (medical records).

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Type in keyword, then click on Search

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Search Results:

Results here

The items from the existing schedule that have not been superseded a
New items have a * after the number.

5 records found for "travel"

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period	Retention Rule	Comments
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...		routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
0004A*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...	A. Pre-employment and Recruitment Records	Pre-employment and Recruitment Records document the activities surrounding the selection processes more...		Pre-employment, Recruitment Records, search records, selection records, announcements records, more...	Official Record: Retain records 4 years after the end of the fiscal year in which the specific more...	Delete or destroy after the retention period has lapsed	View
0005A1*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable and Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable and Procurement and Banking/Cash Handling Records document the payment of more...	A. 1. Records used as supporting documentation for sponsored activities	Accounts Payable, Accounts Receivable, Procurement, Banking records, Cash Handling Records, more...	Official Record: Retain records for 6 years after the expiration/ter... of the sponsored m...	Delete or destroy after the retention period has lapsed	View
0005A2*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable and Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable and Procurement and Banking/Cash Handling Records document the payment of more...	A. 2. Records used as supporting documentation for expenditures related to bond financing more...	Accounts Payable, Accounts Receivable, Procurement, Banking records, Cash Handling Records, more...	Official Record: Retain records for 5 years after the end of the fiscal year in which the bond more...	Delete or destroy after the retention period has lapsed	View
0005A3*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University.	A. Accounts Payable/Receivable and Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable and Procurement and Banking/Cash Handling Records	A. 3. All Other Accounts Payable/Receivable and Procurement and Banking/Cash Handling	Accounts Payable, Accounts Receivable, Procurement, Banking records, Cash	Official Record: Retain records for 4 years after the end of the fiscal year in which all activity more...	Delete or destroy after the retention period has lapsed	View

Ok, Now what?

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period	Retention Rule	Comments
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...		routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
0004A*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, more...	A. Pre-employment and Recruitment Records	Pre-employment and Recruitment Records document the activities surrounding the selection processes more...		Pre-employment, Recruitment Records, search records, selection records, announcements records, more...	Official Record: Retain records 4 years after the end of the fiscal year in which the specific more...	Delete or destroy after the retention period has lapsed	View
0005A1*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable Procurement and Banking/Cash Handling Records document the payment of more...	A. 1. Records used as supporting documentation for sponsored activities	Accounts Payable, Accounts Receivable, Procurement, Banking records, Cash Handling Records, more...	Official Record: Retain records for 6 years after the expiration/term of the sponsored more...	Delete or destroy after the retention period has lapsed	View

New items have * after the Records Code, have Function Descriptions, may have Sub-Category Titles, and have Comments.

Search

The items

New item

43 records found

Ok, Now what?

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period	Retention Rule	Comments
1596	Library: Acquisitions		Library Purchase/Lease Agreements	Library Purchase/Lease Agreements		Library Purchase, Library Lease Agreements	5 after expiration	Delete or destroy after the retention period has lapsed	
1600	Library: Acquisitions		Open Order Cancellation File	Open Order Cancellation File		Open Order Cancellation File	1-5	Delete or destroy after the retention period has lapsed	
1601	Library: Acquisitions		Library Donor File	Library Donor File		Library Donor File	Permanent	Permanent records	
1602	Library: Acquisitions		Library Gifts--Exchange File	Library Gifts--Exchange File		Library Gifts, Exchange File	Until superseded	Delete or destroy after the retention period has lapsed	
1344	Phys Plant: Architects & Engineers		Cost Data Sheets, by Project	Cost Data Sheets, by Project		Cost Data Sheets, project costs	10-25	Delete or destroy after the retention period has lapsed	
1345	Phys Plant: Architects & Engineers		Project Budget Control	Project Budget Control		Project Budget Control	Following completion of project - see comment section	Delete or destroy after the retention period has lapsed	View
1346	Phys Plant:		Executive	Executive		Executive	10 after project	Permanent	View

Items from the previous schedule do not have * after the Records Code, no Function Descriptions, no Sub-Category Titles, and most do not have Comments.

Ok, Now what?

Records Code

0001*

0004A*

0005A1*

0005A2*

Records Code –
Helps you identify
what you are looking
at when talking with
someone else.
Updated items end
with *.

Ok, Now what?

Search F

The items

New items

5 records found for "travel"

Records Code	Function
0001*	1. General Routine Office Transitory Records
0004A*	4. Human Resources Records
0005A1*	5. Financial and Procurement Records

Function – This is the broad category or batch for updated items. For the other items, it is the function and category.



University of California Records Disposition Schedules Manual

Record Detail

Record Name: Revenue from Instructional Use of Computers - 12 month Period

Record Number: 221

Function: Auxiliary & Service Enterprises

Record Category: Enterprise: Computer Center

Record Office: Computer Center

Disposition Record Copy: 0-7

Disposition Other Copy: 0-7

Vital:

CG:

Comments:

Search Results:
The item
New item
5 records

Ok, Now what?

Records Code	Function	Function Description
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...
0004A*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...
0005A1*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...
0005A2*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...

Function
Description –
provides you
with a description
of the
function/batch.

Ok, Now what?

Records Code	Function	Function Description	Category
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records
0004A*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...	A. Pre-employment and Recruitment Records
0005A1*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable Procurement and Banking/Cash Handling Records
0005A2*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the	A. Accounts Payable/Receivable Procurement and Banking/Cash Handling

Category – For updated items, this drills down into the batch to a sub-function. For the other items this is the record name.

Ok, Now what?

Records Code	Function	Function Description	Category	Category Description
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...
0004A*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...	A. Pre-employment and Recruitment Records	Pre-employment and Recruitment Records document the activities surrounding the selection processes more...
0005A1*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable Procurement and Banking/Cash Handling Records document the payment of more...
0005A2*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable Procurement and Banking/Cash Handling Records document the payment of more...

Category Description – For updated items, this describes the sub-function. For the other items it is the record name again.

Ok, Now what?

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	
0004A*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...	A. Pre-employment and Recruitment Records	Pre-employment and Recruitment Records document the activities surrounding the selection processes more...	
0005A1*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable Procurement and Banking/Cash Handling Records document the payment of more...	A. 1. Records used as supporting documentation for sponsored activities
0005A2*	5. Financial and Procurement Records	These are records that document the financial and procurement activities of the University. These more...	A. Accounts Payable/Receivable Procurement and Banking/Cash Handling Records	Accounts Payable/Receivable Procurement and Banking/Cash Handling Records document the payment of more...	A. 2. Records used as supporting documentation for expenditures related to bond financing more...

Sub-Category Title – When needed, this drills down into the sub-function to the specific records.

Ok, Now what?

Keywords – We have added keywords to help you search for the records. We can add more when needed.

Category	Keywords	Retention Period	Retention Rule	Comments
	routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
	Pre-employment, Recruitment Records, search records, selection records, announcements records, more...	Official Record: Retain records 4 years after the end of the fiscal year in which the specific more...	Delete or destroy after the retention period has lapsed	View
	Accounts Payable, Accounts Receivable, Procurement, Banking records, Cash Handling Records, more...	Official Record: Retain records for 6 years after the expiration/term of the sponsored m...	Delete or destroy after the retention period has lapsed	View
	Accounts Payable, Accounts Receivable, Procurement, Banking records, Cash Handling Records, more...	Official Record: Retain records for 5 years after the end of the fiscal year in which the bond more...	Delete or destroy after the retention period has lapsed	View

Ok, Now what?

Retention Period –
This will give the
retention period
for the Official
Record and All
Other Copies.

Priority	Keywords	Retention Period	Retention Rule	Comments
	routine internal reports, routine	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
		Official Record: Retain records 4 years after the end of the fiscal year in which the specific more...	Delete or destroy after the retention period has lapsed	View
		Official Record: Retain records for 6 years after the expiration/ter... of the sponsored m...	Delete or destroy after the retention period has lapsed	View
		Official Record: Retain records for 5 years after the end of the fiscal year in which the bond more...	Delete or destroy after the retention period has lapsed	View

Ok, Now what?

Retention Rule –
This will tell you
whether the record
will need to be
retained
permanently or
not.

Category	Keywords	Retention Period	Retention Rule	Comments
			Delete or destroy after the retention period has lapsed	View
			Delete or destroy after the retention period has lapsed	View
			Delete or destroy after the retention period has lapsed	View
			Delete or destroy after the retention period has lapsed	View

Ok, Now what?

Comments – This will provide you with more detail about the records, whether they are confidential, vital or any other special requirements.

Keywords	Retention Period	Retention Rule	Comments
			View
			View
			View
			View

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period	Retention Rule	Comments
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...		routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
0002A*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	A. Program administration records of enduring historical value	A. Program administration records of enduring historical value are those significant records that more...		academic plans, long range development plans, policy, policies, letters, acknowledge...	Official Record: Permanent, subject to University Archives review. Coordinate the transfer of more...	Permanent records	View
0002B*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	B. Operational program administration records	Operational program administration records do not have enduring historical value, but serve to more...		letters, acknowledge... memos, notes, transmittals, e-mail messages, demonstrate ...	Official Record: Retain records 5 years after the end of the fiscal year in which the records are more...	Delete or destroy after the retention period has lapsed	View
0003A1*	3. Payroll and Benefits Records	Payroll and Benefits Records document the payroll and non-	A. Employee Withholding/D... Authorizations and Individual Payroll Earnings	Employee Withholding/D... Authorizations and Individual Payroll Earnings	A. 1. Non-Retirement Benefit Election or Enrollment Records	employee's withholding allowance certificates, W-4, tax forms, non-	Official Record: Retain records for 50 years after the end of fiscal year in which the	Delete or destroy after the retention period has lapsed	View

Click on hyper-links – get extended results

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...		routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record Retain records for no longer than one year after their administrative use more...
0002A*	2. Program Administration Records	Program administration records document the activities involved in managing	A. Program administration records of enduring historical value	A. Program administration records of enduring historical value are those significant		academic plans, long range development plans, policy, policies, letters, acknowledge...	Official Record Permanent, subject to University Archives review Coordinate transfer

Click on these hyperlinks – all get the same extended results

Function Description:

Function Description:

Transitory records document routine general office activities. In this context the word "routine" means activities related to the typical internal operation of an office, including: staffing, administrative procedures, systems, and communications. They do not serve as documentation of the establishment of unique programs, functions, units, or a campus, nor record fiscal obligations to demonstrate accountability or document important historical decisions of the University.

Category:

1. General Routine Office Transitory Records

Category Description:

Transitory records document routine general office activities. In this context the word "routine" means activities related to the typical internal operation of an office, including: staffing, administrative procedures, systems, and communications. They do not serve as documentation of the establishment of unique programs, functions, units, or a campus, nor record fiscal obligations to demonstrate accountability or document important historical decisions of the University. Transitory records, found in all formats (paper, electronic, or otherwise) may include but are not limited to:

- internal information records, such as office and travel schedules, memoranda, and routine internal reports, reviews and plans, used to disseminate information or for other administrative purposes;
- ordinary, commonplace communications found in letters, acknowledgements, memos, notes, postcards, transmittals, voice-mail messages, e-mail messages and other routine messages, regardless of media;
- office support records, such as procedures to operate routine office equipment e.g. phones, fax machines, photocopiers, and logs and internal requests for the use of office/facilities space and equipment;
- administrative committees' members' records when the member is not the official record keeper for the committee;
- unsolicited job applications and resumes;
- documentation of the day-to-day administration and training of office personnel;
- records of supplies and office services;
- records and documentation of unit activity relating to specific and defined short-term administrative projects;
- source documents used for data input only, after input has been verified; and
- source documents that have been scanned, after the record created from the scan has been verified as accurate and stored in a proper recordkeeping system. The scanning process must meet authentication standards to assure the records' integrity, reliability and trustworthiness. Some source documents may need to be retained, even after scanning if required by law or agency regulations, for example wet-signature promissory notes, oaths, patents, etc. The documentation of the scanning process is not a transitory record and must be retained for as long as the converted record is retained. See the comments section for more information on scanning and recordkeeping systems.

The value (usefulness) of these routine facilitative records is short-lived and therefore their retention period is minimal.

Sub-Category Title:

Keywords:

routine internal reports, routine internal reviews, routine internal plans, letters, acknowledgements, e- mail messages, routine messages, office support records, logs, internal requests, administrative committees members records, unsolicited job

Record Code:

0001*

Functional Category:

1. General Routine Office Transitory Records

Comments:

Records created from scanned source documents must be verified and documented as accurate following the imaging process. Thereafter, the source records may be destroyed unless prohibited by law or agency regulations. The created records must be retained in a proper recordkeeping system for their retention period. The documentation of the scanning process is not a transitory record and must be retained for as long as the converted record is retained.

Some agencies have very specific requirements for retaining source documents and for how imaging must be done. These agencies include but are not limited to FAR, IRS, FDA, and DHS. If required by law or agency regulations, source documents must be kept, even after having been scanned, for example wet-signature promissory notes, oaths, patents, etc. If records governed by an agency are scanned, agency requirements for imaging processes must be met.

A proper recordkeeping system is one that meets University of California standards for assuring the records are authentic and will retain their integrity, availability, and confidentiality for their lifecycle. Proper recordkeeping includes the collection, organization, and categorization of records to facilitate their preservation, retrieval, use, and disposition, allowing records to be:

- grouped with related records into classifications according to operational needs,
- retrieved easily and in a timely manner,
- retained in a usable format for the required retention period found in an approved records retention schedule, on-going investigation or legal action,
- accessed by individuals who have a need for the records found within the system,
- secured from inappropriate access when the records contain personally identifiable information, restricted or confidential information,
- protected from inappropriate dissemination, modification or destruction, and
- disposed of in accordance with approved retention schedules.

2013-07-11 18:23:40

Retaining transitory records longer than necessary consumes resources required to properly manage records of longer term value.

2013-07-11 18:25:17

Some of these records may have restricted information in them. Records containing restricted information (regardless of media) must be protected from unauthorized access, disclosure and disposition, in accordance with University policy and California and Federal laws. Restricted information includes "Notice-Triggering Information" as defined in UC Business and Finance Bulletin Information Series Policy IS-2: (name plus Social Security Number, driver's license or California identification card number, financial account number with a security code, medical

Keywords	Retention Period	Retention Rule	Comments
routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
academic plans, long range development plans, policy, policies, letters, acknowledge...	Official Record: Permanent, subject to University Archives review. Coordinate the	Permanent records	View
employee's withholding allowance certificates, W-4, tax forms, non-	Official Record: Retain records for 50 years after the end of fiscal year in which the	Delete or destroy after the retention period has lapsed	View

Click on the
comments hyper-link
–get the comments

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Search the Records Retention Schedule

- 1. General Routine Office Transitory Records
- 2. Program Administration Records
- 3. Payroll and Benefits Records
- 4. Human Resources Records
- 5. Financial and Procurement Records
- 6. Compliance Records
- Admin: Agreements
- Admin: Applications, Requests
- Admin: Certificates, Licenses, Permits, Registration, Warrantees
- Admin: Contracts, Grants, Agreements

Click on the category or categories you want.

Click on Search.

SEARCH

Search Results:

The items from the existing schedule that have not been superseded are in this database.
New items have a * after the number.

12 records found

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period	Retention Rule	Comments
0004A*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...	A. Pre-employment and Recruitment Records	Pre-employment and Recruitment Records document the activities surrounding the selection processes more...		Pre-employment, Recruitment Records, search records, selection records, announcements records, more...	Official Record: Retain records 4 years after the end of the fiscal year in which the specific more...	Delete or destroy after the retention period has lapsed	View
0004B1*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...	B. Individual Employee Employment and Interns, Volunteers and Contingent Workers Records	Individual Employee Employment and Interns, Volunteers and Contingent Workers Records document mo...	B. 1. Mandatory training and other professional/s... development records	training, professional development, staff development, Employee Training, Faculty Training, more...	Official Record: Retain records for 5 years after the end of the fiscal year in which the training more...	Delete or destroy after the retention period has lapsed	View
0004B2*	4. Human Resources Records	Human Resources Records document the human resources processes and activities of the University, mo...	B. Individual Employee Employment and Interns, Volunteers and Contingent Workers Records	Individual Employee Employment and Interns, Volunteers and Contingent Workers Records document mo...	B. 2. Background Check Records	Candidate Background Check, background check records, on- boarding records, Background check, more...	Official Record: Retain records for 5 years after the end of the fiscal year in which more...	Delete or destroy after the retention period has lapsed	View
0004B3*	4. Human Resources Records	Human Resources Records	B. Individual Employee Employment	Individual Employee Employment	B. 3. Intern, Volunteer and Contingent	Interns, Volunteers, Contingent	Official Record: Retain records for 3 years after	Delete or destroy after the retention period	View

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Search Results:

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437 records found for ""

Records Code	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period	Retention Rule	Comments
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" more...		routine internal reports, routine internal reviews, routine internal plans, letters, more...	Official Record: Retain records for no longer than one year after their administrative use more...	Delete or destroy after the retention period has lapsed	View
0002A*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	A. Program administration records of enduring historical value	A. Program administration records of enduring historical value are those significant records that more...		academic plans, long range development plans, policy, policies, letters, acknowledge...	Official Record: Permanent, subject to University Archives review. Coordinate the transfer of more...	Permanent records	View
0002B*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	B. Operational program administration records	Operational program administration records do not have enduring historical value, but serve to more...		letters, acknowledge... memos, notes, transmittals, e-mail messages, demonstrate ...	Official Record: Retain records 5 years after the end of the fiscal year in which the records are more...	Delete or destroy after the retention period has lapsed	View
0003A1*	3. Payroll and Benefits Records	Payroll and Benefits Records document the payroll and non-retirement benefits processes	A. Employee Withholding/D... Authorizations and Individual Payroll Earnings Records	Employee Withholding/D... Authorizations and Individual Payroll Earnings Records document the more...	A. 1. Non-Retirement Benefit Election or Enrollment Records	employee's withholding allowance certificates, W-4, tax forms, non-resident aliens tax more...	Official Record: Retain records for 50 years after the end of fiscal year in which the records more...	Delete or destroy after the retention period has lapsed	View

Search Results:

The items from the existing schedule that have not been superseded are in this database.
New items have a * after the number.

437 records found for ""

You will see all items in the schedule

Records Code	Full								
0001*	1. Routine Office Transitory Records	records document routine general office activities. In this context the word "routine" more...	Routine Office Transitory Records	records document routine general office activities. In this context the word "routine" more...		reports, routine internal reviews, routine internal plans, letters, more...	Retain records for no longer than one year after their administrative use more...	destroy after the retention period has lapsed	
0002A*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	A. Program administration records of enduring historical value	A. Program administration records of enduring historical value are those significant records that more...		academic plans, long range development plans, policy, acknowledg...	Official Record: Permanent, subject to University Archives review. Coordinate the transfer of more...	Permanent records	View
0002B*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the more...	B. Operational program administration records	Operational program administration records do not have enduring historical value, but serve to more...		letters, acknowledg... memos, notes, transmittals, e-mail messages, demonstrate ...	Official Record: Retain records 5 years after the end of the fiscal year in which the records are more...	Delete or destroy after the retention period has lapsed	View
0003A1*	3. Payroll and Benefits Records	Payroll and Benefits Records document the payroll and non-retirement benefits processes	A. Employee Withholding/D... Authorizations and Individual Payroll Earnings Records	Employee Withholding/D... Authorizations and Individual Payroll Earnings Records document the more...	A. 1. Non-Retirement Benefit Election or Enrollment Records	employee's withholding allowance certificates, W-4, tax forms, non-resident aliens tax more...	Official Record: Retain records for 50 years after the end of fiscal year in which the records more...	Delete or destroy after the retention period has lapsed	View

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retention_schedule

retention_schedule (43).xls - Microsoft Excel

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Cut Copy Paste Format Painter Clipboard

Times New Rom 12 Font

Wrap Text Merge & Center Alignment

General Number

Normal Bad Good Neutral Calculation Check Cell Explainer... Input Linked Cell Note Styles

Insert Delete Format Cells

AutoSum Fill Clear Sort & Find & Filter Select Editing

A	B	C	D	E	F	G	H
Records	Function	Function Description	Category	Category Description	Sub-Category Title	Keywords	Retention Period
0001*	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" means activities related to the typical internal operation of an office, including: staffing, administrative procedures, systems, and communications. They do not serve as documentation of the establishment of unique programs, functions, units, or a campus, nor record fiscal obligations to demonstrate accountability or document important historical decisions of the University.	1. General Routine Office Transitory Records	Transitory records document routine general office activities. In this context the word "routine" means activities related to the typical internal operation of an office, including: staffing, administrative procedures, systems, and communications. They do not serve as documentation of the establishment of unique programs, functions, units, or a campus, nor record fiscal obligations to demonstrate accountability or document important historical decisions of the University. Transitory records, found in all formats (paper, electronic, or otherwise) may include but are not limited to: <ul style="list-style-type: none"> • internal information records, such as office and travel schedules, memoranda, and routine internal reports, reviews and plans, used to disseminate information or for other administrative purposes; • ordinary, commonplace communications found in letters, acknowledgements, memos, notes, postcards, transmittals, voice-mail messages, e-mail messages and other routine messages, regardless of media; • office support records, such as 		routine internal reports, routine internal reviews, routine internal plans, letters, acknowledgements, e-mail messages, routine messages, office support records, logs, internal requests, administrative committees members records, unsolicited job applications, supplies, office services, routine projects, source documents, data input records, scanned documents, acknowledgement, administrative procedures, correspondence, email, e-mail, Fax, general correspondence, informal letter, internal correspondence, internal letter, internal notes, internal plans, internal reports, internal reviews, letter, memo, memoranda, memos, messages, notes, office administration, office equipment, office personnel training, office procedures, Office Schedule, office schedules, office supply, office supply inventory, phone logs, postcards, routine procedures, source documents for data input, source documents for scanning, staffing, supply records, telephone logs, transitory email, transitory records, transmittals, travel	Official Record: Retain records for longer than one year after their administrative use ceases. All Other Copies: Copies are considered non-records and should be retained only as long as they are being used, but no longer than the official record.
0002A*	2. Program Administration Records	Program administration records document the activities involved in managing and/or running the University, a University department or program. There are two categories of program administration records: A. Program Administration Records of enduring historical value, and B. Operational Program Administration Records. The descriptions below and the campus records management coordinator or campus archivist can assist you in distinguishing between the two categories.	A. Program administration records of enduring historical value	A. Program administration records of enduring historical value are those significant records that document the university's development, decision-making process, and the essential cultural history of each campus. Because of their historical importance, they are considered archival records and should be offered to the campus archives when they are no longer required for the day to day activities of the University. Their transfer must be coordinated with the archives.		academic plans, long range development plans, policy, policies, letters, acknowledgements, memos, notes, e-mail messages, procedures, directives, general orders, program case files, strategic plans, organizational charts, functional statements, reorganization, studies, high-profile reports, watershed reports, noteworthy reports, annual reports, special projects records, historical records, official minutes, agendas, final reports, bylaws, official committee	Official Record: Permanent, subject University Archives review. Coord the transfer of these records to the University Archives when no longer needed for current operational business. All Other Copies: Unless found elsewhere in the records retention schedule, the copies identified above in the records, agendas, final reports, bylaws, and historically significant records create all official committees or working groups, including advisory and ad-hoc

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UC Records Retention Schedule FAQs

Is the UC Records Retention Schedule a new requirement?

No, this is an extensive update of the existing retention schedule (Records Disposition Schedules Manual). The schedule is established by the University Records Management Committee in accordance with [Business and Finance Bulletin RMP-1, "University Records Management Program."](#)

Who has to use the UC Records Retention Schedule?

Everyone at UC who handles administrative records. Per [Business and Finance Bulletin RMP-2, "Records Retention and Disposition: Principles, Processes, and Guidelines,"](#) the UC Records Retention Schedule governs the retention of records universitywide. It is to be accessible to any university employee with record-keeping responsibilities and is to be followed by all university units. The policy further states that "All employees who handle administrative records are responsible for applying the guidelines contained in this Bulletin."

Per RMP-1, the schedule does not apply to

- Administrative records held by the Principal Officers of The Regents,
- Teaching and research records (e.g., library materials, faculty research and teaching materials, student examinations), or
- Records pertaining to individual patient care (medical records).

How do I use the UC Records Retention Schedule?

Search by typing into the search box keywords related to the type of records you are looking for, or browse one of the following options:

- Full schedule
- Category

The record items have hyperlinks that you can click on to view the entry in its entirety.

Can I obtain a schedule of just the records that pertain to my office?

You can click on Print Full Schedule and download an Excel spreadsheet of the retention schedule. Then you can delete the sections that do not apply to your area. However, be sure to regularly check the on-line database for any updates.

Will UC continue to update its retention schedule?

Yes. UC is in engaged in a phased project to update its retention schedule. It is reformatting the structure of the schedule, updating retention periods, and replacing the application in which the schedule is presented to users. Once an updated section of the schedule is published, it is immediately effective and the new retention period supersedes any previously published periods.

The University Records Management Committee will continually update the schedule as legislative, regulatory, or business practices changes occur.

UC Records Retention Schedule Glossary

Administrative use – is a retention period assigned to records that are no longer needed to support on-going administrative activities and that become valueless on a unscheduled basis.

Case – records, regardless of media, that documents a specific action, event, person, place, project, or other matter.

Claims – is a type of case that documents the conducting of negotiations, business matters, and the like to a particular conclusion or settlement.

Confidential information – applies broadly to information for which disclosure or access may be assigned some degree of sensitivity, and therefore, for which some degree of protection or restricted access may be identified. Unauthorized access to or disclosure of information in this category could seriously or adversely affect the University and cause financial loss, damage to the University's reputation, loss of confidence or public standing, or adversely affect a partner, e.g., a business or agency working with the University. Information in this category may have limited, moderate, or severe impact on University functions, which must be determined through risk assessment or business impact analysis. (UC Business & Financial Bulletin IS-2: Inventory, Classification, and Release of University Electronic Information §III.A.1.a)

Logistical Records – records that document all arrangements that are made in order to organize and deliver a conference, seminar, symposia or other professional education event.

Notice-triggering information – Section 1798.29 of the California Civil Code, which enacts the security breach notification requirement of the Information Practices Act (IPA), defines the specific personal information that is subject to that section of the IPA. This "notice-triggering information" (name plus Social Security Number, driver's license or California identification card number, financial account number with a security code, medical information or health insurance information) should be classified as restricted information (see Restricted Information). (UC Business & Financial Bulletin IS-2: Inventory, Classification, and Release of University Electronic §III.A.1.b)

Preservation hold – see Records freeze.

Procurement – refers to contracting with firms to provide goods and services in support of the university's mission, sourcing the highest quality of products and services at the least total cost. At UC procurement includes leveraging university buying power through strategic and collaborative sourcing, adoption of proven technologies, and supplier performance management.

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- POLICIES

Records Management Committee

The University Records Management Committee (RMC) is charged by University policy, [RMP-1](#), "University Records Management Program," with coordinating records management across the University to ensure that administrative records are appropriately managed and preserved, and can be retrieved as needed. The RMC is responsible for guiding University records management and privacy policy, developing and maintaining the universitywide records retention schedule, and developing guidelines and procedures supporting best practices and regulatory requirements.

The committee is composed of the records management coordinator from each campus, the Lawrence Berkeley National Laboratory, Agriculture and Natural Resources, and the Office of the President, as well as four ex-officio members representing the General Counsel of The Regents, the UC Archivists Council, the University Auditor in the Office of the President, and the Chief Financial Officer in the Office of the President. The Associate Vice President for Information Technology Services is responsible for overseeing records management and information practices policy and is chair of the committee.

CONTACT

Email [Laurie Sletten](mailto:Laurie.Sletten@ucop.edu)
Phone: (510) 987-9411

ADDITIONAL INFORMATION

- [UC Records Retention Schedule](#)
- [About the UC Records Retention Schedule](#)
- [Schedule Update Project](#)
- [Records Management Committee](#)
- [RMP Policies](#)
- [Related Committees](#)

Location and Primary Member	Alternate Member
<p>BERKELEY</p> <p>Liane Ko Public Records Coordinator Ethics, Risk & Compliance Services Phone: (510) 664-4615</p>	
	<p>DAVIS</p> <p>Lynette Temple Director, Legal Affairs Office of the Campus Counsel Phone: (530) 752-3949</p>

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About the Schedule

Knowing what records to keep and for how long is challenging. A records retention schedule defines the period of time that records should be retained and when they should be destroyed. Various requirements based in law and university policy govern the retention of administrative records. A retention schedule is critical for promoting responsible records management, mitigating risk, and ensuring consistent compliance across UC. The University Records Management Committee (RMC) is charged with developing and maintaining the universitywide records retention schedule. Questions regarding the schedule should be directed to the appropriate [campus Records Management Coordinator](#).

It is important for all members of the University community to adhere to the retention periods in the schedule (except in the cases of a records hold). The schedule serves as the lawful authorization for the disposition of records; consequences of not following the schedule may include court-imposed legal sanctions.

Schedule update project

The RMC currently is conducting a systemwide project to update the records retention schedule. See [Schedule Update Project](#) for more information.

Records included in the schedule

Per University policy, [RMP-1](#), "University Records Management Program," and except as superseded by federal laws and regulations, and university contracts, the retention schedule applies to all administrative records, regardless of their medium, owned by the

- University of California campuses and the Office of the President,
- University of California health sciences centers, and
- Department of Energy laboratories managed by the University of California.

The schedule does not apply to

- Administrative records held by the Principal Officers of The Regents,
- Teaching and research records (e.g., library materials, faculty research and teaching materials, student examinations), or
- Records pertaining to individual patient care (medical records).

These hyper-links work as well

Questions?

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Lynette	Temple	UCD	(530) 752-3949	lstemple@ucdavis.edu
Stephanie	Tenney	UCI	(949) 824-3454	sktenney@uci.edu
Scott	Monatlik	UCLA	(310) 794-6724	smonatilk@finance.ucla.edu
Sonia	Johnston	UCM	(209) 228-4412	sjohnston@ucmerced.edu
Russell	Lewis	UCR	(909) 787-3009	russell.lewis@ucr.edu
Tessa	Mendez	UCSB	(805) 893-7025	tessa.mendez@vadmin.ucsb.edu
Eloise	Cameron	UCSC	(831) 459-2983	elcamron@ucsc.edu
Paula	Johnson	UCSD	(858) 534-2552	pjohnson@ucsd.edu
Brenda Gee	DePeralta	UCSF	(415) 476-4317	bgee@chanoff.ucsf.edu

Questions on this project?

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