

UNIVERSITY ARCHIVES AND RECORDS MANAGEMENT SERVICES

Records Retention and Disposition Schedule Inventory

Liaison Name: _____ Email: _____

Department Name: _____ Unit Name: _____

Dept #: _____ CB #: _____ Phone: _____ Fax: _____

Standard Records Series

Instructions: Please check where appropriate below if your office maintains the official, reference copies or both of the following records.

| Standard Records Series | Record Copy (Official) | Reference Copies |
|------------------------------------------------------------|---------------------------|---------------------|
| ➔ Example: Pass/Fail Forms | √ | |
| Academic Program Records | | |
| Accident Reports (Property/Equipment) | | |
| Accounting and Finance Records (Payable/Receivable) | | |
| Accreditation Records | | |
| Administrative Performance Reviews (Senior Administrators) | | |
| Admission Applications | | |
| Affirmative Action Records | | |
| Alumni Lists | | |
| Annual Reports | | |
| Audit Reports | | |
| Budgets Records | | |
| Calendars of Events | | |
| Career Planning/Placement Records | | |
| Check Registers | | |
| Class Schedules | | |
| Committees and Councils Records | | |

Please complete and return this form to:

University Archives and Records Management Services
 Wilson Library
 Campus Box 3926
 Chapel Hill, NC 27514-8890
 Voice: (919) 962-6402 Fax: (919) 962-6401
 recman@unc.edu

| |
|---------------------------------|
| For UARS Use Only |
| Schedule # _____ - _____ |
| Date Received _____ |
| Receipt Confirmation Sent _____ |

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| Standard Records Series | Record Copy (Official) | Reference Copies |
|---------------------------------------------------|---------------------------|---------------------|
| Conference and Workshop Records (Attended) | | |
| Conference and Workshop Records (Conducted) | | |
| Contracts, Agreements, and Leases | | |
| Correspondence | | |
| Course Development Records | | |
| Course Evaluations by Students | | |
| Course Listings | | |
| Course Syllabi/Outlines | | |
| Enrollment and Grade Reports | | |
| Evaluations (Medical/Psychological) | | |
| Examinations, Test, Term Papers, Homework Records | | |
| Faculty Awards and Honors Records | | |
| Faculty Listings | | |
| Fire and Safety Records | | |
| Grant and External Research Funding Records | | |
| Internship/Fellowship Records | | |
| Mailing Lists | | |
| Maintenance Services (Facilities) Records | | |
| New Course Proposals | | |
| News Media Clippings | | |
| News Releases | | |
| Office Operation Records | | |
| Organization and Association Records | | |
| Parking Assignment Records | | |

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|-----------------------------------------------------|---------------------------|---------------------|
| Permanent Record of Courses | | |
| Personnel (EPA – One Time Payments) Records | | |
| Personnel (EPA) Records | | |
| Personnel (EPA Students) Records | | |
| Personnel (SPA) Records | | |
| Personnel Activity Reports (PARS) | | |
| Photographs | | |
| Policies and Procedures | | |
| Post-Tenure Review Reports | | |
| Publications | | |
| Purchase Card Receipts | | |
| Purchase Orders | | |
| Receipts | | |
| Reference Records | | |
| Reports | | |
| Research Project Records | | |
| Search Committee Records (Administrative Officials) | | |
| Search Committee Records (Faculty) | | |
| Self-Study Records | | |
| Special Gifts Records | | |
| Speeches | | |
| Staff/Faculty Meeting Records | | |
| Student Academic Records (Graduate) | | |
| Student Academic Records (Undergraduate) | | |

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|-------------------------------------|---------------------------|---------------------|
| Student Activity Records | | |
| Student Awards and Honors Records | | |
| Student Financial Aid (SFA) Records | | |
| Supplies and Equipment Records | | |
| Surplus Property Records | | |
| Telephone Billings Records | | |
| Tenure Records | | |
| Textbook Request and Order Records | | |
| Travel Records | | |
| Vendor Records | | |
| Website Files | | |

Please continue to next section.



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UNIVERSITY ARCHIVES AND RECORDS SERVICE

Unique Records Series

Instructions: Please use this section to identify records unique to your office that are not listed above and that are not on your records retention schedule (if applicable).

| | |
|-------------------------------------------------|------------------------------------------------------------------------------------|
| ➤ Example: Title of Unique Records Series | <i>Building Records</i> |
| Description | <i>Records concerning design, construction, renovations to department building</i> |
| Suggested Retention Period | <i>When construction complete?</i> |
| Record Type (Original, Reference Copy, or Both) | <i>Reference Copy</i> |
| Office of Record | <i>Facilities – Design + Construction</i> |

| | |
|-------------------------------------------------|--|
| Title of Unique Records Series | |
| Description | |
| Suggested Retention Period | |
| Record Type (Original, Reference Copy, or Both) | |
| Office of Record | |

| | |
|-------------------------------------------------|--|
| Title of Unique Records Series | |
| Description | |
| Suggested Retention Period | |
| Record Type (Original, Reference Copy, or Both) | |
| Office of Record | |

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Unique Records Series

| | |
|-------------------------------------------------|--|
| Title of Unique Records Series | |
| Description | |
| Suggested Retention Period | |
| Record Type (Original, Reference Copy, or Both) | |
| Office of Record | |

| | |
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| Title of Unique Records Series | |
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| | |
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Thank you!

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