

STEP ONE SCHEDULING FORM

Categories of Typical Office Records by Broad Types

University Archives and Records Service
The University of North Carolina at Chapel Hill

Your name:	_____	Phone #:	_____
School/Department/Unit:	_____	CB#:	_____
Email address:	_____	Date:	_____

Please check "Yes" or "No" if the following categories of records are maintained in electronic and/or paper formats in your unit's offices.

- | <u>YES</u> | <u>NO</u> | |
|-----------------------|-----------------------|--|
| <input type="radio"/> | <input type="radio"/> | <u>Academic Records</u> (course listings, program descriptions, exam files, etc.) |
| <input type="radio"/> | <input type="radio"/> | <u>Administrative Records</u> (mailing lists, event calendar, general correspondence, annual reports, etc.) |
| <input type="radio"/> | <input type="radio"/> | <u>Business / Financial Records</u> (contracts, expenditure reports, telephone billings, etc.) |
| <input type="radio"/> | <input type="radio"/> | <u>SPA Personnel Files</u> (includes temporary/student employees) refer to HR's retention web page:
http://hr.unc.edu/Data/SPA/records/schedules/HR-retention.pdf |
| <input type="radio"/> | <input type="radio"/> | <u>EPA Personnel Files</u> (non-faculty) (includes any student employees paid from EPA funds) |
| <input type="radio"/> | <input type="radio"/> | <u>Faculty Personnel Files</u> |
| <input type="radio"/> | <input type="radio"/> | <u>Grant / Research Records</u> (proposals, research projects, award letters, etc.) |
| <input type="radio"/> | <input type="radio"/> | <u>Student Files</u> (applications, reference letters, financial aid, etc.) |
| <input type="radio"/> | <input type="radio"/> | <u>Alumni Files</u> (names, addresses, etc. of graduates of your program) |

More specific categories:

- | <u>YES</u> | <u>NO</u> | |
|-----------------------|-----------------------|---|
| <input type="radio"/> | <input type="radio"/> | <u>Accreditation Files</u> |
| <input type="radio"/> | <input type="radio"/> | <u>Conferences / Workshops Conducted</u> |
| <input type="radio"/> | <input type="radio"/> | <u>Correspondence File</u> (specific topics or projects) |
| <input type="radio"/> | <input type="radio"/> | <u>Publications File</u> (specific topics or projects) |
| <input type="radio"/> | <input type="radio"/> | <u>Reference File</u> (general documents to which you refer occasionally) |

Other not included above, please list:

Please complete and return this form to: **University Archives and Records Service, CB# 3926**
Voice: 962-6402 Fax: 962-6401
Email: recman@unc.edu