

ADMINISTRATIVE DIRECTIVE

Policy Number: 6.9
Effective Date: 8/13/03

6.9 RECORDS RETENTION SCHEDULE

A. Policy

The permanent copies of all University records belong to the office of origin except medical records that are the property of the Department of Health Information Management. Records should be retained in accordance with the following guidelines.

B. Accounting and Fiscal

Master Copy: Accounting Services

Copies of invoices, receipts, checks, journal vouchers, contribution letters, projections, estimates, membership dues records, internal transactions.

Retention: 7 years.

Copies of: audit work papers, bank deposits and statements, budgets, earnings, registers, gratuities, expense reports, labor cost records, ledgers, logs, petty cash records, travel expense vouchers and requests for authorization to travel.

Retention: 3 years unless combined with any of the above. When combined with any of the above the longer retention applies.

C. Administrative

Correspondence: ALL correspondence at the Dean/Director levels and ABOVE is a permanent record. If you direct a program, etc. that is unique, your correspondence may also be permanent. Please check with University Archives. All other correspondence has a **retention** of 5 years.

All of the following are permanent records of the offices of origin: Master forms, policies, procedures, directives, meeting minutes. Copies of these may be destroyed after 3 years of after they are superseded.

Architectural plans are permanent records.

D. Contract Administration

Master Copy: Usually in Grants and Contracts

Contracts and agreements not pertaining to employment or purchasing.

Retention: 20 years after termination of contract.

E. Supplies and Services

Inventories: 1 year.

Inspection records: 2 years.

Work orders: 3 years.

F. Personnel

MASTER COPY: Human Resource Management

Faculty/Staff personnel records: **Retention:** 2 years after termination or until final disposition of charge or civil action.

Student worker personnel records and graduate assistant personnel records: **Retention:** 3 years after termination or until final disposition of charge or civil action.

Accident reports, injury claims, settlements: **Retention:** 30 years after settlement.

Attendance records: **Retention:** 7 years.

Equal Opportunity reports, pay reports, W-2s: **Retention:** 3 years.

Job descriptions, leave slips, W-4s: **Retention:** 2 years.

G. Purchasing

MASTER COPY: purchasing

Bids, contracts, purchase orders, requests for services, requisitions: **Retention:** 3 years.

Acknowledgments, quotations: **Retention:** 1 year.

H. Student

MASTER COPY: Student Records and Registration

Grade books, course examinations, recommendations, rejected student applications, midterm and final grade reports, permissions, grade cards, Dean cards, drop/add slips, advisor cards, schedules: **Retention:** 1 year after term submitted. If any of these are kept in the student files, the longer retention period applies.

LSUHSC Special Collections: University Archives General Records Schedule

Class lists, doctorate award files, graduate student admission files: 3 years.

Student files, GRE reports, correspondence: 5 years after graduation or term of last attendance.

Student loans and grants: 5 years after award year has ended.

I. Medical Records and X-Rays

All patient medical records and x-rays shall be maintained for an indefinite period of time.