A records retention schedule is a list of the records held in an organization or a department that outlines the amount of time that those records must be kept and what must happen to them at the end of their active life. Records on the schedules are organized into records series, or groups of similar records.

<table>
<thead>
<tr>
<th>Schedule Number</th>
<th>Records Series</th>
<th>Series Description</th>
<th>IUC Retention Group</th>
<th>Retention Explanation</th>
<th>Minimum Retention</th>
<th>Disposition</th>
</tr>
</thead>
<tbody>
<tr>
<td>99-18B-01</td>
<td>Accreditation Files</td>
<td>Materials relating to accreditation and site visits for accredited programs. Record Copy of final Accreditation Report held by Provost's Office.</td>
<td>ADM3020</td>
<td>Administration: Policies/Procedures - Compliance</td>
<td>ACT+10</td>
<td>Archives</td>
</tr>
<tr>
<td>99-18B-03</td>
<td>Advanced Standing Files</td>
<td>Materials relating to the awarding of advanced standing, including documentation of student performance and rules and regulations. Copies of decisions are also inserted into Student Files.</td>
<td>EDU1010</td>
<td>Education: Student Records - Non-Permanent Records</td>
<td>ACT+1</td>
<td>Shred</td>
</tr>
</tbody>
</table>

Sample records retention schedule

There are two types of schedules – functional schedules include records similar to many departments within an organization. Departmental schedules supplement functional schedules with records series that are special to that department. Before schedules can be written, an inventory of the records is done. Retention periods are assigned based on state and federal legislation and administrative and historic value.

At UC we use the records retention matrix developed by a committee of the Inter-University Council of Ohio to determine legal retention. This matrix was created using state and federal regulations. We also consider the collection policies of the University Archives to determine what records will be assigned a permanent retention period and send to the Archives.

By creating and following records retention schedules, we ensure that we are in compliance with state and federal record-keeping requirements, we maintain efficient and cost-effective offices and we ensure the historic preservation of the University’s information.

Do you know where to find your department’s records retention schedules? Do you know how long you need to retain the records that you create and manage? Get assistance today by contacting UC Records Management.

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