

Title of Document	Retains Record Copy and Type	Dean's Office Copy and Type	Department Copy and Type	Retention Time	Description of Document
(1) Professional Accreditation Records	COE	Dean Office Academic Programs- Paper & electronic	Yes Paper	Permanent for self-evaluation reports, final accreditation reports, and accreditation organization evaluation reports; 2 accreditation cycles for statistical reports, working papers, correspondence, and all remaining records	<b>Explanation:</b> This series documents the accreditation process for the colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most accreditation organizations produce an evaluation report based on the packet and on-site inspection, which is used to determine accreditation for the units and their programs. This series may include but is not limited to: self-evaluation reports; final reports sent to accreditation organization; statistical data; working papers; accreditation organization evaluation report; and related documentation and correspondence.
(2) Administrative Reports	Creating units	Deans Office faculty Services	Yes Paper	Permanent for final annual reports and periodic and summary statistical reports not reflected in the final annual report; until superseded or obsolete for all other records	<b>Explanation:</b> This series documents the annual activity of the institution and its subdivisions. This disposition includes reports prepared for the university by the president of the institution. Final annual reports may be printed and bound or they may be less formal unpublished documents prepared for limited distribution. Reports may include but are not limited to periodic statistical reports; summarized statistical reports; copies of reports from other units; other working papers; final annual reports; and related documentation and correspondence.
(4) Advisory Board Records	Colleges & Units		Yes Paper	Permanent for minutes, agendas, reports, and correspondence; 3 years for all other records	<b>Explanation:</b> This series documents the activities of boards and councils, which function in an advisory capacity. Boards and councils may have as their charge highly specific or broad areas of concern and include members from outside the institution. This series may include but is not limited to meeting minutes; agendas; reports; notes; working papers; audio recordings; transcriptions; and related documentation and correspondence
(7) Agency Relations Records	Colleges & Units		Yes Paper	7 years	<b>Explanation:</b> This series documents the institutional interactions with local, state, national, and international government agencies, educational institutions, businesses and groups to gain their assistance with the development and coordination of institution research and instructional programs. This series may include but is not limited to: reports; copies of publications; minutes; background information; and related documentation and correspondence.

(8) Association and Organization Advisory Records	Colleges & Units		Yes Paper	3 years	<b>Explanation:</b> This series documents the relationship and participation of institution units in professional and educational associations and other organizations. The unit's role may be one of membership on the advisory or administrative board, participation in a task force or subcommittee, or one of membership in consortia. This series may include but is not limited to: promotional information; rules and regulations; reports; proposals and planning records; workshop and conference records; surveys and questionnaires; minutes; and related documentation and correspondence. This series does not include individual faculty or staff membership information.
(9) Audit Records	Units	Dean-electronic copy	Yes Paper	10 years	<b>Explanation:</b> This series documents the unit's response to internal and independent management, operations, and fiscal audits. This series may include but is not limited to: audit reports; written responses showing how recommended changes will be implemented; and related documentation and correspondence.
(10) Awards Records	Administering units	Research Office (for faculty) paper	SRG (for staff) paper	Permanent for eligibility terms and selection criteria, award history and information on funding sources, award notifications, summary lists of winners, biographies of winners, and press releases; 1 year for all other records	<b>Explanation:</b> This series documents the process of selecting institutional faculty, staff, students and alumni to receive awards, fellowships, and scholarships based on merit or achievement. The series may include but is not limited to: applications; nomination letters; eligibility terms and selection criteria; recommendations; transcripts; letters of award notification or denial; letters accepting or declining awards; summary lists of winners; biographies; demonstration of need documentation; press releases; award history and information on funding sources; and related documentation and correspondence.
(11) Committee Records	Institutional executive offices; Faculty Senate, Colleges & units	Deans Office & Senate web sites & paper	Yes Paper	Record Copy - Permanent for agendas, minutes, reports, and correspondence; 10 years for all other records of Faculty Senate Committees; 3 years for all other records of other committees	<b>Explanation:</b> This series documents the activities of standing and ad hoc committees and councils made up of members from a variety of units. The committees are charged with formulating and recommending institutional policies and procedures, establishing standards and requirements, performing an advisory function, or reviewing petitions, appeals, and deviations from policy. Types of committees include administrative committees (those appointed by an administrator) and faculty senate committees (those created by the faculty senate's executive committee). They may function as steering committees, activities committees, standards committees, planning committees, academic committees, awards committees, councils, etc. Committees may be chaired by the director of a specific unit or rotate to different chairs on a regular basis. This series may include but is not limited to: agendas; meeting minutes; reports; notes; working papers; and related documentation and correspondence.

(13) Correspondence, Administrative	Units	Deans office Paper & Electronic	Yes digital & Yes Paper	5 years	<b>Explanation:</b> Series documents communications received or sent which contain significant information about an institution's programs. Records include letters sent and received, memoranda, notes, enclosures, and attachments.
(14) Correspondence, Executive	Creating units	Deans office Paper & Electronic	Yes digital & Yes Paper	Permanent	<b>Explanation:</b> This series documents significant events and the development of administrative structure, policies, and procedures of the office. It may also record the historical development of the office. Records may include: letters sent and received; notes; directives; acknowledgments; and memoranda. Correspondence may be inter-office, within the university, and with non-university agencies, organizations, and individuals.
(16) Correspondence, General (Routine)	Units	Deans office Paper & Electronic	Yes digital & Yes Paper	5 years	<b>Explanation:</b> Series documents communications received or sent which do not contain significant information about an institution's programs. Records include: letters sent and received; memoranda; notes; transmittals; acknowledgments; community affair notices; charity fund drive records; routine requests for information or publications; enclosures and attachments.
(20) Data Input Forms	Units	Deans office Paper & Electronic	Yes	Until input and verified	<b>Explanation:</b> This series contains several types of paper forms that are used to create the same record in electronic form. This series may include: service requests, such as work orders and mailing orders; surveys; instructor evaluations; tests; and other forms. This series does not include accounting system input documents and listings.
(21) Election Records	Organizations, Units	Deans office Paper & Electronic	Yes digital & Yes Paper	4 months	<b>Explanation:</b> This series documents elections held by various faculty and staff organizations. This series may include but is not limited to: ballots; tabulations; and related documentation.
(22) Faculty Senate Records	Faculty Senate	Deans Office	No	Permanent	<b>Explanation:</b> This series documents the proceedings and actions of an institution's faculty senate. Discussions and actions of the faculty senate deal with such areas as curriculum, program development, promotion and tenure, and legislative relations. This series may include but is not limited to: meeting notes/minutes; studies; recommendations; resolutions and enactments; reports; agendas; working papers; and related documentation and correspondence.
(23) Gifts Records	Administering units	COE Development Office & Business Office Paper & Digital	Yes Paper	Permanent for letters and agreements of gift, copies of bequest instruments and wills from individuals or estates, and related documentation and correspondence; 7 years for all other records.	<b>Explanation:</b> This series documents potential or realized private, corporate, or public agency funding to the institution, including endowments and trusts. This series may include but is not limited to award guidelines; letters and agreements of gifts; copies of bequest instruments and wills from individuals or estates; financial statements and reports, including records of fund disbursements; and related documentation and correspondence.

(24) Grievance Records	Affirmative Action, Academic Affairs, Human Resources, Legal Advisor, and Units	Deans Office paper	Yes Paper	3 years after resolution	<b>Explanation:</b> This series documents grievances brought forward by faculty and staff against the institution and which are resolved without litigation. (Records of grievances that are litigated become part of the legal case file.) Grievances may pertain to personnel policies and procedures; articles contained in the collective bargaining agreement (classified staff only); departmental issues; affirmative action and equal opportunity issues; and promotion and tenure (faculty) issues. Records may include but are not limited to notices of grievance; informal discussion notes; grievance responses; formal hearing notes (including audio tapes); final summary statements; appeals documentation; and related documentation and correspondence. Information may be exempt from public disclosure.
(26) Institutional Addresses and Statements	Institutional executive offices, Colleges, Units	No	No	5 years for drafts, source material, and working papers; Permanent for all other records	<b>Explanation:</b> This series documents speeches and statements written and delivered by institutional faculty and staff in connection with institutional business. This series may include but is not limited to: final copies; audio or video recordings of the speech presentation; drafts; source materials; and working papers.
(27) Institutional Cooperation and Relations Records	Colleges & Units	Deans Office paper & digital	Yes Paper +electronic	Permanent for proposals, planning documents, activity reports, policy statements, publicity; 7 years after expiration for all other records	<b>Explanation:</b> This series documents the coordination and interaction between units for the cooperative administration of programs within the institution. This series is used for monitoring, planning, and coordinating research, instructional, or administrative programs of common concern to two or more institutional units. This series may include but is not limited to: copies of budget reports; activity reports; proposals; planning documents; agreements and memoranda of understanding; publicity and newspaper clippings; policy statements; working papers; and related documentation and correspondence.
(28) Institutional Planning Records	Institutional executive offices	Deans Office paper & digital	Yes digital & Yes Paper	Permanent for final planning reports, proposals, goal and objective statements, and instructions and explanations of process; 20 years for internal planning committee materials, surveys, activity reports, working papers, informational materials, and corre	<b>Explanation:</b> This series documents the college or unit's role in the development of short-term or long-term plans for the institution. This series may include but is not limited to: instructions from the president; provosts; and/or vice provosts explaining the nature and purpose of the requested strategic planning effort; internal planning committee materials; statements of objectives and goals as developed by college or unit chairs and administrators; proposals; strategic planning reports; surveys; activity reports; informational materials; working papers; and related documentation and correspondence.

(29) Lectures and Lecture Series Records	Sponsoring unit	No	Yes	Permanent for lecture committee notes, memoranda and planning materials, programs and announcements, news releases, and transcripts, and photographs; 7 years for all other records	<b>Explanation:</b> This series documents the development and history of special lectures and continuing lectureships devoted to a variety of topics and disciplines sponsored by the institution. This series may include but is not limited to: lecture committee notes; memoranda and planning materials; information on funding; financial support and honoraria records; patron information; programs and announcements; information on catering arrangements; news releases; recordings and transcripts; photographs; and related documentation and correspondence.
(32) Board of Regents Relations Records	Units	Deans Office paper & digital	Yes Paper	3 years after obsolescence	<b>Explanation:</b> This series documents the coordination and interaction between institutional administrative units and the Board of Regents which has ultimate authority over both academic and fiscal programs. This series may include but is not limited to: minutes; agendas; dockets; notes; activity reports; proposals; newsletters; memos; and related documentation and correspondence.
(33) Policies and Procedures Records	Creating units	Deans Office Digital (WEB)	Yes digital & Yes Paper	3 years after obsolescence	<b>Explanation:</b> This series provides a record of internal development and documents guidelines for consistency and continuity in the operation of the unit. This series may include but is not limited to: mission and policy statements; planning documents outlining responsibilities and goals; organizational charts; publications preparation guidelines; emergency procedures; job descriptions; guides for office procedures which often include completed samples of all forms; handbooks; desk manuals; and related documentation and correspondence.
(34) Professional Membership Records	Units	Deans Office paper	Yes digital & Yes Paper	4 years	<b>Explanation:</b> This series documents institutional-paid individual memberships and activities in professional organizations. These records may include but are not limited to: applications for membership; certification of membership; documentation of activities; and related correspondence.
(36) Signature Authorizations	Units	Deans Office Business Office Paper & digital	Yes Paper	7 years after authorization expires	<b>Explanation:</b> This series documents the certification of the institution's employees who are authorized to sign fiscal and contractual documents. These documents serve as an aid for management control over expenditures. This series may include but is not limited to: authorization date; name; sample signature; position data; remarks; and conditions.

(37) Special Activity Records	Creating units	Deans Office	no	Permanent for final reports and study designs; 3 years for all other records	<b>Explanation:</b> This series documents the activities of an office which are performed in addition to its regular or main functions. Examples may include the completion of surveys and questionnaires, compilation of special studies for professional or academic associations, and special mailings. This series may include but is not limited to: arrangements documentation; working papers; questionnaires; survey forms; study designs; reports; and related documentation and correspondence.
(38) Special Event Records	Creating units	Deans Office paper & digital	Yes digital & Yes Paper	7 years after end of event	<b>Explanation:</b> This series documents the efforts of a college or unit to provide informative sessions, short-courses, workshops, training programs, excursions, and celebratory events for members of the institution and the communities it serves. This series may include but is not limited to: materials on planning and arrangements; reports; promotional and publicity materials; press releases and news clippings; photographs; presentation materials and handouts; schedules of speakers and activities; registration and attendance lists; participant evaluations; and related documentation and correspondence.
(39) Staff Meeting Records	Units	Deans Office Digital (WEB)	Yes digital & Yes Paper	Permanent for meeting notes/minutes, agendas, and reports; 5 years for all other records	<b>Explanation:</b> This series documents the meetings of the faculty and/or staff of a college, department, or office that sets policy and procedures for the unit. Participants at meetings may be composed exclusively of a mixture of faculty, staff, administrators, and managers; specialized and task oriented sub-committees composed of unit personnel are also documented as part of this record series. These meetings may concern routine matters of procedure and topics such as program development, planning, administrative and personnel management, and assessments of future needs. This series may include but is not limited to: meeting notes/minutes; reports; working papers; agendas; and related documentation and correspondence.
(40) Vehicle Use Authorization and Request Records	Units	Deans Office paper	Yes Paper	5 years after superseded o	<b>Explanation:</b> This series documents permission for employees to use their private automobiles for official use and authorization of non-employees and students to use state-owned cars. Records may include but are not limited to: private vehicle safety certification forms; private vehicle certificate lists; driver authorizations for students and non-employees; and related documentation and correspondence.

(41) Visiting Scholar Program Records	Units	NA	Yes Paper	7 years	<b>Explanation:</b> This series documents a program which allows one or more visiting scholars to assume residence on campus for an academic year or a shorter duration. This series may include but is not limited to: advertisements; applicant data; arrangements and schedules; publicity and news clippings; presentation transcripts or published works; scholars activities documentation including audio recordings; and related documentation and correspondence.
(43) Equipment Inventory Records	Property Management	Deans Office Yes Paper updated yearly	Yes Paper updated yearly	4 years for biennial inventory records; 4 years after disposal of equipment from unit for all other records	<b>Explanation:</b> This series documents the acquisition, location, transfer, and disposition of state-owned property and equipment. This series may include but is not limited to: equipment inventory lists; physical inventory information cards; equipment inventory forms; lost/stolen property reports; damage or loss of state property claim; equipment transfer forms and memos; and related documentation and correspondence. The series may also include periodic equipment lists; returned departmental equipment inventory lists with annotations concerning resolution of problems associated with the accountability, physical condition, and physical location of specified pieces of equipment; and accountability and responsibility statements.
(45) Equipment Maintenance Records	Units	Deans Office	yes	3 years after disposition of	<b>Explanation:</b> Series documents the operation, maintenance, service and repair of institutional equipment. Records may include: purchase orders; lease agreements; warranties; instructions and operating manuals; vendor statements; service contracts; charge call bills; fax activity reports; service logs; invoices for equipment repair; purchase request forms; and memoranda.
(46) Equipment Rental and Loan Records	Units	no	Yes Paper	2 years after return of prop	<b>Explanation:</b> This series is used to monitor the rental/loan and return of university property such as recreational equipment and lockers and is also used to determine usage trends as an aid to purchase and replacement decisions. Records may include: rental agreements; loan forms; usage logs; and related correspondence.
(52) Property Disposition Requests Records	Property Management	Deans Office paper	Yes Paper	5 years	<b>Explanation:</b> This series documents custodial units' requests to change the status of state-owned property. A status change may consist of declaring an item surplus, salvage or scrap, lost or stolen, transferred, traded in, etc. This series includes state property disposition requests forms and related documentation and correspondence.
(53) Requisitions Records	Business Services, Units	Deans Office	Yes Paper for 3 years	5 years	<b>Explanation:</b> This series documents the purchase of supplies and services by the institution. This series may include but is not limited to: purchase requests; purchase orders; inter-departmental requisitions for equipment, supplies, and services; and related documentation and correspondence.

(56) Shipping Lists and Packing Slips	Units	Deans Office paper	Yes Paper	5 years	<b>Explanation:</b> This series documents the receipt of equipment, supplies, other items and services from vendors. The series includes: packing slips; shipping and container lists; and bills of lading.
(57) Surplus Property Records	Property Management	Deans Office paper	Yes Paper	4 years	<b>Explanation:</b> This series documents changes in state owned property; requests to declare items surplus, salvage, or scrap; removal and sale or disposal of excess equipment and other surplus items including proceeds from sales. Records may include but may not be limited to surplus property declaration and pick-up requests; pick-up request worksheets; state property disposition requests; quarterly and other computer generated reports of sales to other departments, agencies, or private parties; journal vouchers; descriptive information; property sale flyers; surplus property sales inventory lists; bills of sale; cash receipts; vehicle odometer statements; and related documentation and correspondence.
(58) Vehicle Records	Transportation Services, Units	Deans Office	yes	3 years after disposal of ve	<b>Explanation:</b> This series documents departmental administration of vehicles such as cars, vans, trucks, trailers, boats, tractors, and farm vehicles for accounting and insurance purposes. It may also document the service history, accumulated mileage, and disposition of each vehicle of institutionally owned vehicles, including routine preventative maintenance, mechanical repairs, and accident damage repairs. This series may include but is not limited to: registrations; vehicle warranties; maintenance agreements; service contracts; vehicle inventories containing information regarding description, dollar value, and date of purchase; maintenance and repair logs; maintenance requests and work orders; gas slips; repair notices and authorizations and related documentation and correspondence.
(60) Vendor History Reports	Colleges & Units	Deans Office paper	Yes Paper	Until superceded for advertising materials; 2 years after superseded or obsolete for all other records	<b>Explanation:</b> This series is used for quick reference of vendor data, selection, and updating pertaining to departmental and college operations. This series may include but is not limited to: reports containing vendor numbers, payee names, invoice numbers, amounts, warrant/voucher numbers, and message comments; copies of purchase orders; requisitions; packing slips; promotional and advertising materials; product specification sheets; and related documentation and correspondence.

(61) Building Space Inventory and Valuation Records	Controller's Division	Deans Office Research Office autocad	No	Permanent for summary space inventory reports and building valuation reports; 10 years for all other records	<b>Explanation:</b> This series documents the buildings owned and leased by the various institutions within the University System both on and off campuses. Building space inventory reports are used to project institutional space needs; to identify deferred maintenance; and to provide cost recovery support documentation for major research universities receiving federal money, grants, or private gifts. The inventories are kept at the institution level with periodic updates being provided to the Board of Regents. Records include but are not limited to computer generated reports with details by building, type of space, principal use, department, and area. Records may also include various summary reports. Building valuation reports are used for State Insurance Fund purposes, and include building name, building number, location, capitalized value, and insured value.
(62) Buildings/Grounds Repair, Maintenance, Remodeling, and Construction Records	Facilities Services	Deans Office Research Office	Yes Paper	Permanent for floor plans, layouts, sketches, and specifications; 7 years for all other records	<b>Explanation:</b> This series documents the condition, upkeep, and routine maintenance of the institution's buildings and grounds. It also documents remodeling and construction projects with a total expenditure of less than \$100,000 over six years. This series may include but is not limited to: floor plans; specifications; layouts; sketches; maintenance agreements; work logs; sign-in sheets; and related documentation and correspondence.
(63) Capital Construction Project Records	Facilities Services	Deans Office Research Office	no	Permanent	<b>Explanation:</b> This series is used to provide a record of the planning, administration, and implementation of current and potential capital construction projects on campus (projects with a total expenditure of at least \$100,000 over six years); to project needs for projects; and as a reference to projects once they have been completed. The series also provides a record of the funding of current capital construction projects on campus and to prepare budgets and allocations for capital construction projects. This series may include but is not limited to: project descriptions and requirements; plans; plan reviews; project schedules; contract change orders; bid documentation; contracts and agreements with architects, artists, engineers, consultants, vendors, and contractors; materials and soils reports; progress reports; insurance reports; payment schedules; summary reports; memos; final acceptance statements; architectural blueprints; sketches; aerial photographs; preliminary planning drawings; as built drawings; drawings reflecting changes to the original plans; soil testing maps; any other type of graphic representation produced relating to buildings, systems, and land. The series also includes project descriptions; budget projection and allocation records; budget authorization forms; budget change orders; final acceptance statements; and related documentation and correspondence.
(65) Classroom and Laboratory Utilization Reports	Facilities Services	Deans Office OIT	Yes digital & Yes Paper	5 years for final utilization reports; 2 years for preliminary utilization reports	<b>Explanation:</b> This series provides information about the utilization of classroom and laboratory space. This series includes preliminary and final reports, which contain class number, time of the class, and the number of students in the class.

(69) Annual Fiscal Reports	Business Office	Deans Office Yes Paper and digital	Yes Paper and digital	10 years	<b>Explanation:</b> This series documents annual fiscal year-end status of accounts and is used to provide the office with summary information relating to its programs which may be used for planning or review. Records include: reconciliation reports; annual operating statements; schedules of rates; and related correspondence.
(70) Annual Financial Statements	Business Office	Deans Office Yes Paper and digital	Yes Paper and digital	Permanent	<b>Explanation:</b> This series provides a summary and report of fiscal year operations in accordance with Government Accounting Standards, board rules, and generally accepted accounting procedures.
(71) Correspondence, Fiscal	Units	Deans Office Yes Paper and digital	Yes digital & Yes Paper	7 years	<b>Explanation:</b> Records document communication and other government agencies, vendors, and the public pertaining to the agency's fiscal policy, obligations, and revenue. Records include correspondence sent and received by the agency's administrative and/or business office staff.
(72) Development and Endowment Management Fee Records	Research Accounting	Deans Office Yes Paper and digital	Yes digital & Yes Paper	7 years	<b>Explanation:</b> This series documents the revenue earned quarterly on gift accounts and fees charged by the institution's development office. Information includes: dates; gift account amounts and identification numbers; earnings; department or account responsible for payment; and fee amount.
(74) Miscellaneous Accounting Reports	Creating units	Deans Office Yes Paper and digital	Yes digital & Yes Paper	5 years for annual reports; 1 year for monthly and quarterly reports and working papers	<b>Explanation:</b> This series documents the production of various accounting reports made by individual offices or departments on a monthly, quarterly, or annual basis. These reports provide summary information relating to the department and its programs, and may be used for planning or review. Reports include operating statements, year-end projections, reconciliation's, expenditures by facilities, accumulated hours and dollars by employee, summaries of assets and liabilities, sales, cost accounting, and income. Records may include but are not limited to: working papers; drafts; final reports; and related documentation and correspondence.
(77) Accounts Payable Records	Business Office	Deans Office	Yes Paper	4 years	<b>Explanation:</b> This series documents a department's expenditures and purchases. The series may also be used to research, evaluate, and monitor prior transactions and/or track the budget. Records may include but are not limited to: departmental purchase orders; contract release orders; balance sheets; bills; invoices; invoice vouchers; journal voucher/entry forms; price quotes; purchase orders; departmental requisitions; justifications of purchases; payment authorizations; reports of receipt of goods or services; and related documentation and correspondence.

(78) Accounts Receivable Records	Business Office		Yes Paper	2 years after collected or deemed uncollectable	<b>Explanation:</b> This series is used by departments and offices to provide a record of billings and collections for the office and units/programs, which report to the office. It is also used to provide a record of customers owing monies and to reconcile the account. Records may include but are not limited to: Account Edit sheets; classified advertisement forms; VISA/MasterCard payment forms; invoices; journal vouchers; receipts; and related documentation and correspondence.
(82) Charge Airfare Records	Units	Deans Office	Yes Paper	2 years	<b>Explanation:</b> This series documents airfares purchased as part of institutional business. Records include forms used to authorize the issuance of airline tickets and the charging of fares to a university account.
(84) Collection Records	Business Office		Yes Paper	3 years after account is paid	<b>Explanation:</b> This series documents the office's efforts to collect unpaid accounts. Records include: collection letters; notices; letters of transmittal; and bankruptcy records.
(85) Credit Card Administration Records	Units	Deans Office	Yes Paper	7 years	<b>Explanation:</b> Series documents administration of credit cards issued to institutional staff and units. Records may include: applications; master monthly billing statements; individual card holders' statements; billing summaries; printouts including vendor analysis by code; number of charges and stores; use summaries; related correspondence.
(91) Travel Records	Business Office-Travel	Deans Office	Yes Paper	4 years	<b>Explanation:</b> This series may be used: to document requests for and approval of travel by employees of the institution or the agency; to monitor travel expenditures; for planning purposes; to document changes in dates of travel, changes in the name of the traveler, changes in itinerary, or changes in funding sources within an out-of-state travel authorization; and to document approval for vehicle rental. Records may include but are not limited to: out-of-state travel authorization forms; travel itineraries; travel advance forms; travel reimbursement requests (employee and non-employee); receipts; approval memos; memos in place of itemized receipt; affidavits of lost receipt memos; authorizing signatures; and related documentation and correspondence.
(93) Budget Activity Reports	Units	Deans Office Yes Paper and digital	Yes digital & Yes Paper	10 years for year-end reports; 1 year for all other records	<b>Explanation:</b> This series provides a record of departmental fiscal activity presented in summary form that may be used for budget planning. These records may be used to analyze budget cuts or restructuring of programs. Records may include: working papers; memoranda; final summary reports and spreadsheets; and related documentation and correspondence.

(94) Budget Maintenance Records	Units	Deans Office Business Office Paper & digital	Yes digital & Yes Paper	4 years	<b>Explanation:</b> This series documents the changes made in the initial unit budget as distributed by the institution's budget office at the beginning of the new fiscal year. This series may include but is not limited to: budget change request forms; budget change suspense records; budget change registers; authorization for budget change forms; copies of revised unit initial budgets; fund transfer notices; spread sheets; expenditure and obligation reports; allotment reports; and related documentation and correspondence.
(95) Budget Planning, Projection, and Preparation Records	Budgets & Planning	Deans Office	Yes digital & Yes Paper	10 years	<b>Explanation:</b> This series is used to develop the initial institutional budget, plan budget requests for and document annual budget allocations to individual units, and record changes in operating budgets of the various financial accounts. Records may include but are not limited to: budget requests; budget status reports; budget change requests, registers and logs; budget detail reports; working papers including spread sheets, expenditure projections, salary and budget worksheets; allotment, capital outlay and equipment need reports; unit budget preparation instructions; and related documentation and correspondence.
(96) Cooperative Federal Program Budget Preparation, Projection and Allocation Records	Administering units	Deans Office Business Office Paper & digital	No	10 years	<b>Explanation:</b> This series is used to develop, estimate, propose, and plan preliminary budget requests for cooperative federal/state programs and reflects the process by which the annual budget allotment is to be distributed to the department and its programs. This series may include but is not limited to: budget expenditure statements; general ledger statements of accounts; salary work sheets; budget exhibits; project detail sheets; budget requests; budget change sheets; federal agency annual reports; federal agency status of fund reports; journal vouchers; reports to monitor FTE budgets; spread sheets; expenditure projection work papers; preliminary section budget proposals; budget development schedules; allotment reports; decision packages; spending plans; compensation plan proposals; contingency/deviation plans; various federal publications; reports; forms; and related documentation and correspondence.