

Records Management Tools You Can Use

Filing Guide for Managers' Records

Records relating to the daily management of financial, personnel, and operational matters that are created and maintained by managers at all levels of the organization. Records may be originals, or copies of records maintained by other departments, such as Financial Services or Human Resources.

RECORD CATEGORY	USE TO FILE	RETAIN
Budget Plans & Reports	Spreadsheets, tables, computer-generated reports, originals or copies of forms, and other documents used to plan and manage department budgets. Financial Services retains budget planning documents for 7 years and final budget documents permanently.	2 years
Departmental Administrative Meeting Minutes and Agenda	Minutes and agenda of regular and ad hoc department meetings, meeting notes and action items, reference and research information used at meetings and correspondence related to meetings.	2 years
Departmental Policies and Procedures	Guidelines, standards or requirements for carrying out department-specific functions and activities, such as policy statements, procedure manuals, job aids or other types of instructional materials.	Until outdated or reference use ended
Human Resources Records – Active Employees	Copies of original documents found in the official personnel file maintained by Human Resources, such as <i>Staffing Request Form (Non Faculty)</i> , <i>Alternate Duty/Leave</i> , and <i>Performance Review</i> forms as well as meeting notes, position descriptions, and correspondence. The Human Resources department retains official personnel files for seven years after an employee leaves the organization.	1 year after employment ceases or the employee transfers to another College department
Internal Committee Meeting Minutes, Agenda & Reports	Copies* of internal College committee meeting minutes and agenda, reports produced by the committee or submitted to the committee and correspondence.	Until outdated or reference use ended *Committee Chairs should contact Records & Info. Management for retention of original records.
Operational & Strategic Plans & Reports	Presentations given at strategic or operational planning meetings about the department's ongoing and future activities, meeting minutes and agenda and/or formal reports, meeting notes, research and reference information, finalized plans, and other related documents.	Until outdated or reference use ended
Purchase Requisitions & Invoices	The yellow copy of the <i>Purchase Requisition</i> form, copies of invoices and receipts for goods or services purchased by the department, descriptions of purchased goods and services, correspondence, and other related documents. Financial Services maintains originals of PRs & invoices for 7 years.	2 years