



Records Retention Worksheet How-To Guide

Find your Department’s Records Retention Worksheet listed in the Records Custodian list. Pay close attention to the Inventory Year on the worksheet. All worksheets are the most recent that have been submitted.

Update the Division, Department, Records Custodian, Inventory Year. Using the most recent SSU General Retention Schedule, update the Retention and Disposition accordingly. The IUC Code and Medium columns will no longer be needed. The retention is the same no matter what medium is used.

If your Department doesn’t have a Retention Worksheet in the folder, open a sample worksheet (either General or Academic), determine what types of records are kept in your area (use the sample as a guide, you can add more records from the Retention Schedule or delete them from the sample). Find the record series in the SSU General Retention Schedule and save the worksheet using the year, Retention Worksheet, and department (i.e. 21.22.Retention.Worksheet.Student.Government.). Email completed worksheet to [Sherry Scott](mailto:Sherry.Scott@shawnee.edu)

Make sure the span dates (i.e. 2015-2022) are completed for each series of records. If you find that you can dispose of records, complete the [Records Disposition Form](#) and get approval to destroy or archive the records. After destroying the records, update the span dates in your Retention Worksheet. If records are sent to the library for archival, and you no longer keep that record series, you can remove the series from the worksheet. If you still keep the record, update the span dates to reflect the year you archived up to the present.

RECORDS MANAGEMENT WORKSHEET					
DIVISION: Academic Affairs					
DEPARTMENT/OFFICE:					
LOCATION:					
RECORDS CUSTODIAN:					
INVENTORY YEAR: FY21-22					
In accordance with ORC Section 149.33 and Shawnee State University Policy (See Policy 5.34 Rev. Records Management, Retention, and Disposal), a schedule of retention and destruction for the following records is hereby established. The records covered by this schedule, upon expiration of the retention period, shall be destroyed unless otherwise specified (See Procedure 5.34:1 Records Management, Retention, and Disposal) No record shall be destroyed that pertains to any pending claim, action, litigation or request.					
Record Series	Description	Span Dates	Retention	Disposition	Notes
Purchasing Card	Documentation of P-Card expenditures		Act+4	Destroy-Secure	BearTrax
Travel Expenses	Record of expenses incurred on official travel. Used to receive reimbursement		4Y	Destroy-Secure	BearTrax
Trip Documentation	Documentation for various department/academic trips	2003-Present	SUP	Destroy-Secure	
Budget Files	Includes invoices, payment orders, monthly reports, receipts, etc.		4Y	Destroy-Secure	BearTrax
Software/Hardware/Equipment	Inventory of software/hardware/equipment	Ongoing (Annual renew)	4 years	Destroy-Secure	
Local Copy: Faculty Personnel Files	Unofficial faculty personnel files		3 years	Destroy-Secure	Provost's Office maintains official faculty personnel files, Archived in Feith

If you find that you have records that aren’t clearly listed on the SSU General Schedule or the IUC General Schedule, contact Sherry Scott at sscott2@shawnee.edu with any questions.