

Departmental Records that can be transferred to the University of Wisconsin-Stevens Point University Archives

The following is a list of State of Wisconsin approved General Records Schedules with permanent retention periods for university records. This is not intended to be an exhaustive list of records that should be transferred to the University Archives. This list is meant to be used as a guide to understand what types of records the University Archives regularly collects for permanent preservation. These records should not be transferred to the University Archives if the department needs them to conduct daily business. For more information please contact us at (715) 346-2586.

[UWADM001](#) POLICIES AND PROCEDURES

[UWADM003](#) ALPHABETICAL/TOPICAL FILES (SUBJECT FILES)

[UWADM005](#) PLANNING DOCUMENTATION (CAMPUS WIDE)

[UWADM006](#) REORGANIZATION DOCUMENTATION

[UWADM007](#) ORGANIZATIONAL CHARTS

[UWADM015](#) UNIVERSITY PUBLICATIONS

[UWADM018](#) AGENDAS/MINUTES

[UWADM023](#) ANNUAL/SUMMARY REPORTS

[UWFA100](#) ADMINISTRATIVE POLICIES AND PROCEDURES

[UWLA0003](#) LEGAL TRADEMARK AND INTELLECTUAL PROPERTY- FORMAL LEGAL DOCUMENTS

- To view all the University of Wisconsin System General Records Schedules please visit the Office of General Counsel [website](#).

- [UWADM001](#) POLICIES AND PROCEDURES

This record series consist of university established departmental policies and procedures, including manuals, manual codes, handbooks, and other related materials.

*NOTE: Some institutions may consider some or all of these policies to have archival value; consult your institution's archives for additional information.

Retention: EVT + 7 Years EVENT= Policy or procedure is superseded

Destroy or Transfer to Archives per institutional policy.

PII? No

Confidential? No

Copies: Destroy when no longer needed.

- [UWADM003](#) ALPHABETICAL/TOPICAL FILES

This record series consists of files which document the activities of academic and operational departments on campus, including the internal development and operations of programs. Records can include correspondence, reports, memoranda and notes, publications, and announcements. These files may also be known as subject files, departmental or office files, mixed files, or program files. The files may include records of non-historical value scheduled by other RRDAs, which may be removed by each institution's archives upon receipt.

Retention: EVT + 3 Years EVENT= Creation of materials

Transfer to Archives for review.

PII? No

Confidential? No

Copies: Destroy when no longer needed.

- [UWADM005](#) PLANNING DOCUMENTATION (CAMPUS WIDE)

Strategic, business and operational planning files at all levels of the university, including, but not limited to, final plans, calls for proposals, publicity or presentation materials specifically related to planning initiatives, and significant work papers. The official copy of this series is held in the highest-level office

affected by the plan being documented (e.g. a campus master plan will be held by the Chancellor's Office; a school/college plan will be held by the Dean's Office, etc.)

Retention: EVT + 6 Years EVENT= Plan is completed or superseded.

Transfer to the Archives

PII? No

Confidential? No

Copies: Destroy when no longer needed.

- [UWADM006](#) REORGANIZATION DOCUMENTATION

This record series consists of documents showing organizational changes within the college or university, including files of significant addition, deletion, or transfer of administrative, functional or regulatory responsibilities, etc.

Retention: EVT + 2 Years EVENT= Date reorganization is completed.

Transfer to Archives

PII? Yes

Confidential? No

Copies: Destroy when no longer needed.

- [UWADM007](#) ORGANIZATIONAL CHARTS

This series consists of the records of the official organizational structure of each college of university, as well as that any smaller schools within those institutions.

Retention: EVT + 0 Years EVENT= Organizational chart is superseded.

Transfer to Archives

PII? Yes

Confidential? No

Copies: Destroy when no longer needed.

- [UWADM015](#) UNIVERSITY PUBLICATIONS

All publications - whether one-time only or serial- produced by the university, such as newsletters, newspapers, magazines, pamphlets, brochures, press releases, bulletins and catalogs. This series includes both analog and digital publications.

Retention: EVT + 3 Years EVENT=Creation of the materials

Transfer to Archives

PII? No

Confidential? No

Copies: Destroy when no longer needed.

- [UWADM018](#) AGENDAS/MINUTES

Minutes and agendas for all official meetings, including department, committee, faculty senate meetings (including high-level committee meetings), council meetings, university wide meetings and Department Chair correspondence. This series also includes any supplementary documents or other materials that are associated with the minutes.

Retention: EVT + 3 Years EVENT= Approval of the Minutes

Transfer to Archives

PII? No

Confidential? Potentially; contact the records creator for more information.

Copies: Destroy when no longer needed.

- [UWADM023](#) ANNUAL/SUMMARY REPORTS

This series consists of summaries of accomplishments, goals, statistics, awards received, anticipated program needs and plans, as well as any supplementary documentation to support such reports.

Retention: EVT + 5 Year EVENT= End of the reporting period

Transfer to Archives

PII? No

Confidential? No

Copies: Destroy when no longer needed.

- [UWFA100](#) ADMINISTRATIVE POLICIES AND PROCEDURES

Records include all written policies, procedures, and related documentation pertaining to fiscal matters. These may be issued by the University of Wisconsin System or by individual institutions. Retention Time Period

Original: $EVT + 4 \text{ years}$ EVENT = Date superseded.

Disposition: Transfer to Archives per institutional policy.

Duplicates: Destroy when no longer needed. Do not retain duplicates longer than the original record.

PII: No

Confidential: No

- [UWLA0003](#) LEGAL TRADEMARK AND INTELLECTUAL PROPERTY- FORMAL LEGAL DOCUMENTS

Official legal documents dealing with Trademarks and Intellectual Property which are retained by legal Affairs. Examples of these documents include those related to, but not limited to: trademark, intellectual property, trusts, real estate, and certain legal agreements or court orders related to trademarks and intellectual property.

Retention Time Period

Original: $CR + 50 \text{ Years}$ CR = Creation Year

Disposition: Transfer to University Archives

Copies: When no longer needed for administrative or quality control purposes destroy

Confidentially

PII: Yes

Confidential: Yes