

State of Michigan
Michigan Historical Center
Records Management Services
P.O. Box 30026
Lansing, MI 48909

RECORDS RETENTION AND DISPOSAL SCHEDULE

<p>CHECK APPLICABLE: <input type="checkbox"/> COUNTY <input type="checkbox"/> CITY <input type="checkbox"/> VILLAGE <input type="checkbox"/> TOWNSHIP <input type="checkbox"/> COURT <input type="checkbox"/> SCHOOL DISTRICT <input checked="" type="checkbox"/> OTHER</p> <p>GOVERNMENT UNIT NAME: Michigan Technological University</p> <p>DEPARTMENT NAME: Controller's Office</p> <p>The records described herein are deemed necessary: (1) for the continued effective operation of this agency; (2) to constitute an adequate and proper recording of its activities; and (3) to protect the legal rights of the government entity and of the people of Michigan.</p> <p>This Retention and Disposal Schedule meets the administrative, legal and fiscal requirements of this agency. NOTE: This schedule must be signed by all approving entities before the agency disposes of any records.</p>	<p style="text-align: center;">APPROVALS (SIGNATURES)</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 80%;">AGENCY REPRESENTATIVE <i>Michael J. Hendrick</i></td> <td style="width: 20%;">DATE 02/12/08</td> </tr> <tr> <td>MICHIGAN HISTORICAL CENTER--RECORDS MANAGEMENT SERVICES <i>Debra Seabert</i></td> <td>DATE 3/25/08</td> </tr> <tr> <td>MICHIGAN HISTORICAL CENTER--STATE ARCHIVES OF MICHIGAN <i>Mark H. Hany</i></td> <td>DATE 4/3/08</td> </tr> <tr> <td>STATE ADMINISTRATIVE BOARD</td> <td>DATE 5/6/2008</td> </tr> </table> <p style="text-align: center; font-weight: bold; font-size: 1.2em;">APPROVED</p>	AGENCY REPRESENTATIVE <i>Michael J. Hendrick</i>	DATE 02/12/08	MICHIGAN HISTORICAL CENTER--RECORDS MANAGEMENT SERVICES <i>Debra Seabert</i>	DATE 3/25/08	MICHIGAN HISTORICAL CENTER--STATE ARCHIVES OF MICHIGAN <i>Mark H. Hany</i>	DATE 4/3/08	STATE ADMINISTRATIVE BOARD	DATE 5/6/2008
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ITEM NUMBER	RECORD/RECORD SERIES TITLE AND DESCRIPTION	RETENTION PERIOD
	See attached "Records Management Schedule"	

MichiganTech

Records Management

General Schedule Fiscal and Financial Records

Record Title Sponsored Programs

Series Number
42000

Description

This general schedule is applicable to all MTU offices and units which maintain sponsored program activities fiscal records for in-house control and monitoring, and for which the origin of auditable copies are retained by either Office of Sponsored Programs, Research Accounting, the originating department or by Accounting Services. These records include, but not limited to grant and contract agreements, final reports, and any other related documentation and correspondence.

Confidential
Yes

Electronic Record
Yes and No

Vital
No

Record Copy
General Schedule – Fiscal and Financial Records

Update
2/1/2008

Retention

Sponsored activities administered under the terms and conditions of a grant or contract agreement normally require retention of records for three (3) years and 3 months after the expiration date of the agreement except as otherwise stated therein. This time period is measured from the final project ending date extended by any amendments or modifications.

Historical Value Assessment
Routine financial housekeeping file – no historical value.

Office Practice
Office scans original documentation and links ImageNow to Banner.

Record Title
Rebilling Units

Series Number
80000

Description

This general schedule is applicable to all MTU offices and units which maintain sponsored and non-sponsored activities fiscal records for in-house control and monitoring, and for which the original auditable copies are retained by the Originating department. These records include, but are not limited to telephone billing statements, chemistry stores requisitions, motor pool activity, and other related documentation and correspondence.

Confidential
Yes

Electronic Record
Yes and No

Vital
No

Record Copy
General Schedule – Fiscal and Financial Records

Update
2/1/2008

Retention

Sponsored Programs Documentation:

Sponsored activities administered under the terms and conditions of a grant or contract agreement normally require retention of records for three (3) years and 3 months after the expiration date of the agreement except as otherwise stated therein. This time period is measured from the final project ending date extended by any amendments or modifications.

Non-Sponsored Programs Documentation:

Retain 2 years plus current year and then destroy.

Historical Value Assessment

Routine financial housekeeping file - no historical value.

Record Title
Accounts Payable Records (Non-Sponsored Programs)

Series Number
80000

Description
This general schedule is applicable to all MTU offices and units which maintain non-sponsored activities (Designated Funds, General Fund, Auxiliary Activities Funds) fiscal records for in-house control and monitoring, and for which the original auditable copies are retained by Accounting Services. These records include, but are not limited to, purchase orders, bills, invoices, invoice vouchers, forms, justifications of purchases, payment authorizations, reports of receipt of goods or services, travel expense statements, and related documentation and correspondence.

Confidential
Yes

Electronic Record
Yes

Vital
No

Record Copy
General Schedule – Fiscal and Financial Records

Update
2/1/2008

Retention
Retain 2 years plus current year and then destroy.

Comment
University purchasing card documents follow the sponsored programs retention schedule.

Office Practice
Offices may routinely retain some purchase orders for longer periods to provide information on equipment and supplies ordered.

Historical Value Assessment
Routine financial housekeeping file - no historical value.