

Umpqua Community College Records Retention Schedule

References:

OR Administrative Rules (OAR) for Community Colleges 2019
 IFAP: CFR DCL Record Keeping, Privacy, & Electronic Processes 2019
 ICPAS.ORG Record Retention Guidelines for Business ?
 Grossman St. Amour CPA PLLC 2019
 IRS 2019
 ERA: Equal Employment Opportunity Commission Record Retention Schedule ?
Division 450 (Community Colleges)

<https://secure.sos.state.or.us/oard/displayChapterRules.action>
<https://ifap.ed.gov/fsahandbook/attachments/1819FSAHBKVol2Ch7.pdf>
https://www.icpas.org/docs/default-source/tax-practice-procedures-files/records-retention-guidelines1a841fd38106fa827cf0000493078.pdf?sfvrsn=dd94701d_0
<https://gsacpas.com/resources/record-retention-guidelines/>
<https://www.irs.gov/businesses/small-businesses-self-employed/how-long-should-i-keep-records>
<https://hrxperts.org/pdf/hrcentral/By%20Topic/Record%20Retention/EEOC%20Record%20Retention%20Chart.docx>

	Description	Minimum Duration	IRS	FFA	ERA/ADA	CPA	UCC
Administration	166-450-0005 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26397						
Accreditation, Institutional (01)	Self-Study & Final Eval	Permanent					
Administration General (02)	Internal Administrative & Hskpg	1 yr					
Administration Program (03)	Daily & Business Activity	5 yrs					
Advisory and Committee (04)	Notebooks, Working Files	Until Superseded					
	A&C Other Records	3 yrs					
Association and Organization Membership (05)	College Representation	5 yrs					
Budget Committee (06)	Minutes & Budget Books	20 yrs					
	B & C Other Records	2 yrs					
	Advisory	5 yrs					
College Committee (07)	Formation & Naming, Recognition	Permanent					
College History (08)	Permission to Reproduce	5 yrs After Expiration					
Copyright (09)	See General Records Retention						
Correspondence (10)	Tax Levy, Bond, Ballot Text, Filing	Permanent					
Election Records (11)	Enrollment Reporting	10 yrs					
Full-Time Equivalency (12)	Minutes, Oaths, Agenda, Policies	Permanent					
Governing Board (13)	GB Audio Recordings*	Until transcribed or summarized in minutes; Other records - 5 yrs					
	Building or Remodel Grants	10 yrs After Comp					
Grant, Administrative (14)	Other Building Contracts	6 yrs After Expire					
	Administration of Approved Grant	Permanent					
	Unsuccessful Grant & Support Docs	1 yr					
	Fixed Assets	2 yrs After Disposition					
	GA Other Records	5ys After Final Report accepted					
Instructional Planning (15)	Final Reports	20 yrs					
	IP Other Records	5 yrs					
	Managing & Monitoring	5 yrs After Case Closed					
Legal Case (16)	Lines of Administrative Responsibility	Until Superseded					
Organizational Charts (17)	Board Approved Policies & Procedures	5 yrs After Superseded					
Policy and Procedure Manuals (18)	Awards Records	3 yrs					
Professional Development & Awards (19)	Disposition of Non-permanent Records	Permanent; other records until Superseded					
Records Management & Archives Program (20)	Designated Employee Sign Fiscal & Contract Docs	6 yrs After Authorization Expires					
Signature Authorization (21)	Lists, work schedules, ins, publicity, stats & Correspondence	5 yrs					
Volunteer Program (22)							
Bookstore	166-450-0010 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26399						
The General Schedule (1)	Official Copies of All Public Records	See OAR 166-030-0027					
Bookstore Operation (2)	Forms, Instructor Copy, Purchases	Minimum 2 yrs					
Child Care	166-450-0015 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26400						
Child Abuse Report Records (1)	Records of Reporting & Recognition Training	1 yr After Reporting					
Accident Reports (2)	Action Taken, Aid Provided	1 yr					
Billing Records (3)	AR Records, Financial & Accounting	3 yrs					
Daily Attendance (4)	Arrival Times, Sign in Sheets	1 yr					
Facility License Records (5)	Annual Licensing Documents	5 yrs					
Food Programs (6)	US Dept of Agriculture Program	5 yrs					
Case Files (7)	Admissions, Approvals, Communications	1 yr After last Attendance					
Immunization Records, Student Workers (8)	Certifications	1 yr					
Criminal History for Staff (6)	166-450-0090 Required to Check OR LEDS	2 yrs					
Contracts & Agreements	166-450-0020 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26401						
Bid & Award Records (1)	Purchasing: RFI, RFP Eval, & Awards	10 yrs After Substantial Completion					
	Other Accepted Bids	6 yrs After Award or Cancelled					
	Rejected Bids	2 yrs After Award or Cancelled					
Contacts & Agreements (2)	Building or Remodel	10 yrs After Substantial Completion					
	Other Contracts	6 yrs After Expire					
Instructional Agreements & Records (3)	Participation w/Partners in Ed Courses & Programs	6 yrs After Expire					
	Working Papers	Until Finalized					
Personal Service Contracts (4)	Addenda, Justifications, Proposals, Expense, Correspondence	6 yrs After Expire					
Software License Agreements (5)	Documentation, Statically Reports of Usage	6 yrs After Expire					
Title and Deed Records (6)	Real Property Acquired and Sold	Permanent					
Curriculum & Instruction	166-450-0025 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26403						
Academic Calendar Records (1)	Documents Dates of Significance to Community	3 yrs					
Accreditation Records, Prof Programs (2)	Self-Study & Final Report (Nursing, EMT, Etc.)	Permanent					
	Other Documents	Until Accreditation Complete					
	Student Enrollment Records, Instructor Notes	1 yr					
Class Lists (3)	Final Draft: Classes, Dates, Times	10 yrs					
Class Scheduling (4)	Policies, Procedures, Programs, Descriptions	1 yr					
College Catalog (5)	Programs Offered at Correctional Inst	5 yrs					
Corrections Program (6)	Computer Hardware & Software	1 yr After Disposal					
Course Enrollment Summaries (7)	Documented Enrollment Records	5 yrs					
Course Lists (8)	All Existing Courses	5 yrs					
Course Outline (9)	Documents Submitted to Curriculum Coord	5 yrs After Superseded					
Course Syllabus (10)	Outline of Learner Outcomes, Expectations	3 yrs After Superseded					

Curriculum Development Funds (11)	Funds Provided to Develop or Revise Programs	3 yrs
HS Dual Enrollment Participation (12)	Approvals, Alternative Ed, GED, HS	5 yrs
	Contracts and Agreements	6 yrs
New & Revised Certificate & Degree (13)	Documented Planning to Approval	10 yrs
	Working Papers	1 yr
Program Student Handbooks (14)	Fields of Study Docs, Faculty, Academic Require	1 yr
Small Business Development Center (15)	Training and Counseling & Stats	10 yrs
Distance Education/Learning	166-450-0030 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26404	
Records Management (1)	Development of ED/Learning to Delivery Methods	6 yrs After Expire
	College Instructor Delivery Method Licenses	5 yrs
	Other Administrative Records	6 yrs After Expire
FCC License (2)	Methods of Communication Delivery & Frequency	
Equipment/Supplies/Property	166-450-0035 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26405	
Equipment and Furniture (1)	Inventory Listings	Until Superseded
	Inventory Transfers, Forms, Warranties	1 yr
Equipment Ownership & Operation (2)	Service calls, Maintenance, Related Docs & Comm	2yrs After disposition
Vehicle Records (3)	Purchase/Inventory, Titles, Service, Agreements	Until Vehicle Disposed or Transferred
	Registration, Warranties, Maintenance	2 yrs
	Other Records	1 yr
Facilities	166-450-0040 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26406	
Bldg. Grounds Repair, Remodel, Const (1)	Remodel & Construction Records, Permits & Cont	10 yrs After Substantial Completion
Facilities Inventory Records (2)	Land Values, Purchase/Disposition, Description, Usage	Until Superseded
Prevailing Wage Reports (3)	Wage Rates for Workers on Construction Projects	5 yrs
Swimming Pool Operation & Maint (4)	Water Quality, Water exchanges, Service, Warranties	5 yrs
Utility Systems & Equipment (5)	Operations & Maintenance	Until No Longer in Service
Student Financial Aid	166-450-0045 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26407	
Title IV, Program Records, Institutional (1)	Prgm Participation Agreement, Recertification, Audit	Follows Administrative Retention
	Consortia Agreements	6 yrs
	Borrower Eligibility	3 yrs After Last Attend Date
	FISAP Operations/Applications, Documentation	3 yrs After Submitted
	Loan, Claim, Expenditures, Questioned by T4, HEA	End of Retention Period
FFELP & Direct Loan Records (2)	Direct Loan Records, Applications, Disbursements	3 yrs After Last Attend Date
Financial Aid Annual Reports (3)	Cumulative Loan Activity, Audit, Exhibits, Rebuttals	20 yrs
	Audit Working Papers, Schedules & Instructions	Until Completion of Audit
Fiscal Records & Reports (4)	State Grant, Scholarship, Work-Study Payroll, FISAP	3 yrs After Award Unless FISAP Specified
	Bank Statements, Cash Disbursements, Refunds, Repayments	
Perkins Loan Program Records (5)	Records Relating to Administration of Loan	3 yrs After Last Attend Date
Student Consumer Information (6)	Security, Right-to-Know, Equity, EADA, FERPA	3 yrs After Award Year Published
Student Financial Aid Records (7)	SAR, ISAR, Veteran, COA, FEEL, Fed Loan Records	3 yrs After End of Award yr
Student Records, Institutional (8)	Admission, Enrollment, Academic Progress	3 yrs After End of Award yr
Financial & Accounting	166-450-0050 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26408	
Account Reconciliation Records (1)	Checks, Cash, Bank Accounts, Fixed Assets, Cap Expenditures	5 yrs Fed, Other 3 yrs
Accounts Payable (2)	Encumbrances, PO, Balance Sheets, Bills, Invoice, Vouchers, Petty Cash	5 yrs Fed, Other 3 yrs
Accounts Receivable (3)	Transaction Activity for Monies Owed and Paid to the College	3yrs After Reconciled or Deemed Uncollectable
Annual Financial Reports (4)	Reports Utilized in Monitoring Financial Condition	20 yrs
Audit Reports (5)	Official Audit and Report	20 yrs
	Grant Funds	5 yrs
	Other Records	1 yr After Audit Completed
Bond Records, Financial (6)	Authorizations & Financial Documentation	3 yrs After Final payment
Budget Planning & Preparation (7)	Develop, Propose, Plan, Budget Requests	5 yrs
Budget Records (8)	Approved Budget by Governing Board	20 yrs
	Other Records	Most recent 2 Budgets
Budget Status Reports (9)	Budget Reporting of Year End Spending by Dept	5 yrs
	All Other Budget Reports	Most recent 2 Budgets
Capital Construction (10)	Funding Records	Life of Structure
Check Conversations Records (11)	Automated Clearing House (ACH) Paper	30 Days
	ACH Transaction, IRD6	6 yrs, destroy
Correspondence, Fiscal (12)	Communication Between College and Government Agencies	3 yrs
Credit & Debit Receipts (13)	Credit and Debit Receipts	36 Mo, Destroy
General Ledger & Trial Balance (14)	Fiscal Year End	20 yrs
	Subsidiary Ledgers, Journals, Registers	Until Superseded
Grant Records, Financial (15)	Expenditures Federal and other Grants	5 yrs After Final or Annual Expenditure
	Fixed Assets	2 yrs After Disposition
Journal Vouchers (16)	Documentation Explaining and/or Justification	3 yrs
Purchasing Records (17)	Vendor Files	Until Superseded or Obsolete
	Other Records	3 yrs
Receipts & Receipt Registers (18)	Records of Money Received and Deposited	3 yrs
Subsidiary Ledgers, Journals, Registrars (19)	Trust Fund Ledgers	2 yrs After Closed
	Subsidiary Ledgers, Journals, Registers	2 yrs
Unclaimed Property Report (20)	Unfound Person or Entity with Financial Assets Owed	3yrs After Remitted to State Lands
Health Services	166-450-0055 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26411	
Communicable Disease (1)		
Laboratory Inspection (2)		
Licensure Records (3)		
Medical Records (4)	No Health Services Provided	
Patient Satisfaction Surveys (5)		
Pharmacy Prescription Dispensing (6)		
Practitioner Schedule (7)		
Student Health Insurance (8)		

Information Management	166-450-0060	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26412	
Computer Services Disaster Recovery (1)		Steps Taken to Restore System Services	Until Superseded
Computer System Maintenance (2)		Records Related to Repair or Service	Life of System & Components
		Records of Regular or Essential Back-ups	Until Updated or Obsolete
Computer System Documentation (3)		Planning, Development, Software Mgmt., Maintenance	Life of System
IS System Planning and Development (4)		Implemented Systems	Life of System
		Unimplemented Systems	3 yrs
Software Management (5)		Compatibility, License, Copyright Provision, Related Docs	Until Software Disposed
Institutional Research Records	166-450-0065	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26413	
General Schedule (1)		Specified Agency records	See OAR 166-030-0027
Research & Reporting (2)		IPEDS, OCCURS, Internal Reports, US DEPT of ED	10 yrs
		Other Reports	5 yrs
		Preparation Material	1 yr
Institutional Services	166-450-0070	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26414	
Mail, Copy, Print Svcs Account Records (1)		Copy Machine Accounts	3 yrs
		Other Accounts	1 yrs
Postal & Shipping Records (2)		Documentation of Incoming & Outgoing Pkgs & Mail	3 yrs
Work Orders (3)		Requests & Documentation of Repairs	1 yr
Intercollegiate Athletics Records	166-450-0075	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26415	
Athletic Eligibility (1)		Academic Progress, NWAACC	5 yrs
Athletic Scheduling (2)		Competition Schedules set up by Coaches & Director	6 yrs After Expire
Game Arrangement (3)		Reference Record	1 yr
Game Statistics (4)		NWAACC Official Scoring & Related Docs	20 yrs
Practice Schedule (5)		Team Rosters - time spent	1 yr
Student Athletic Eligibility (6)		NWAACC Progress, related correspondence	3 yrs
Student Athlete Medical History (7)		Before, during and After College Attendance	3 yrs
Library & Media	166-450-0080	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26416	
Acquisition Records (1)		Records Documenting Purchase of Library Materials	
		Requesting and Ordering Records	2 yrs
		Purchasing Records	3 yrs
		Other Records	1 yr
Audio-Visual Materials & Equip Loan (2)		Request Forms	1 term
		Delivery Records & Statistical Reports	5 yrs
Borrower Registration Records (3)		Library Access Material & Records	No Longer Registered or Cleared Acct
Circulation Records (4)		Statistical Reports	10 yrs
		Other Records	Until Transaction Complete
Cooperative Regional Library Contract (5)		Records of Movement of Materials	6 yrs After Expire
Cooperative Regional Library Service (6)		Establishing Documents	Until Service Disestablished
		Minutes & Exhibits	20 yrs
		Other Records	5 yrs
Films, Videotapes & Sound Recordings (7)		Produced	Until Final Product
		Acquired through License & Copy write	Retain According to Terms
Inter-Library Loan (8)		ILL Requests, ALA Requests, & Associated Records	3 yrs
Library Catalog (9)		Holding Records	Until Material Withdrawn
		Serial Holding	Until Subscription Terminated
Library Reports (10)		Statistical Reports & Operation Reports	5 yrs
Overdue Records (11)		Open Charges	10 yrs
Reference Records (12)		Periodic Reports on Usage Activities & Docs	1 yr
Payroll Records	166-450-0085	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26417	
Employee Time & Attendance (1)		Time Sheets	3 yrs
		Time summary Reports	1 Academic Yr
		Other Records	2 Yrs After Separation
Employee Payroll (2)		PERS Enrollment	75 yrs
		Other Records	5 yrs After Separation
			3 Yrs if Batch Filed
Payroll Register (3)		Year-End Official Copy	75 yrs
Wage & Statement (4)		W2 forms & Tax Reports	5 yrs
Personnel Records	166-450-0090	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26418	
Affirmative Action/Equal Opportunity (1)		Final Plans	15 yrs After Superseded
		Equal Opportunity Plans, Updates, Policy Stmts	50 yrs
		Complaint Records, Documentation & Decision	3 yrs After Decision
		Other Records	3 yrs
Bargaining Unit (2)		Official Copy	20 yrs
		Published Manual	Until Superseded
Classification Specification (3)		Job Analysis, Classifications, Evals, Descriptions	5 yrs After Reviewed or Inactive
Collective Bargaining (4)		Collective Bargaining Contracts	50 yrs
		Contracts and Agreements	30 yrs
		Grievance Arbitration Decisions	30 yrs
Compensation Plan (5)		Compensation Plans	5 yrs After Superseded
		Other Records	1 yr
Criminal History (6)		Staff History Check	2 yrs
Employee Benefits (7)		Insurance, Deductions, PERS Enrollment, Termination	2 Yrs After Separation
		PERS Enrollment	75 yrs
Employee Medical Records (8)		Hazard Exposure	30 yrs After Separation
		Other eRecords	3 yrs After Separation
Employment Eligibility (9)		I-9's & Proof Documentation	3 yrs or 1 year After Employee Separation
Grievance Records (10)		Notices, Discussion Notes, Formal Hearing Notes	5 Yrs After Resolved
Individual Employee Personnel (11)		Employment Applications (Most Recent & Successful)	75 yrs After Date of Hire
		Other Records	3 yrs After Separation

Recruitment & Selection (12)	Unsolicited Applications	3 mo
	Other Records	2 yrs
Staff Training (13)	Records of Academic, Workshop, & Seminars	5 yrs
Wellness Program (14)	Surveys, Committee, Newsletters & Workshops	3 yrs
Public Safety Records	166-450-0095 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26419	
Officer Notebooks (1)	Shift Notes	2 yrs
Parking Records (2)	Permits, Citations & Documents	2 yrs
Vehicle Pool Inspection (3)	Records of Daily Safety Inspections	1 yr
Publications & Promotional Records	166-450-0100 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26420	
Marketing Research (1)	Surveys & Notes, Clippings, & Correspondence	1 yr
Press Releases (2)	Press & Public Service Announcement	5 yrs
Publications (3)	Final Publication	Permanent
	Preparation Records	Until Final Printed
	College Catalog	Permanent
Risk Management	166-450-0105 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26421	
Accident, Injuries, & Incident Reports (1)	Drills, Reports, & Correspondence	5 yrs
Business Continuity & Recovery Plans (2)	Emergency, Recovery, Drafts & Final Plans	Until Superseded
	Other Records	Until Plan Adopted
Environmental Health & Safety (3)	Adopted Plans	20 yrs
	Other Records if Federal Funding Received	3 yrs After Final Expenditure Report
	Other Records if No Federal Funding Received	2 yrs
Department of Motor Vehicle Records (4)	Reports that Include Plate Numbers, Owner Info	1 yr
Hold Harmless/Liability Waiver (5)	College Related Travel	6 yrs After Expire
Insurance Claims (6)	Records Relating to Incident	10 yrs After Claims Settlement
Insurance Policies (7)	All Policies related to College Coverage	10 yrs After Policy Expire
Key Issuance Records (8)	Key Assignments (including card) and Doc's	1 yr After Return
Risk Management & OSHA Employee Safety	166-450-0110 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26422	
Risk Management & OSHA Safety Train (1)	Environmental Health Safety Plans & Procedures	2 yrs
Risk Factor Reports (2)	Annual Insurance & Insurance RFP Selection	5 yrs
Safety Committee (3)	Workplace Safety Issue Reports and Documents	3 yrs
Safety Inspection (4)	Inspection Reports, Actions, Summaries & Correspondence	10 yrs
Student Housing & Food Services Record	166-450-0115 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26423	
Catering and Special Events (1)	Orders, Billing, Evals, Reports & Correspondence	2 yrs
Student Housing Contract Appeals (2)	Appeals Denied	1 yr
	Appeals Accepted	6 yrs After Contract Expire
Student Housing Contract (3)	Applications, Student Contracts, Proof of Admission	6 yrs After Contract Expire
Student Housing Incidents (4)	Housing Director Decisions, Appeals, Correspondence	1 yr After Case Closed
Student Records, Academic	166-450-0120 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26424	
Assessment Placement & Testing (1)	Placement, GED, NLN Testing	5 yrs
	Special Academic Program Orientation	1 yr
	Other Records	5 yrs
Grade Records (2)	Official Electronic Grades	75 yrs
	Grade Change Forms or Grade Sheets	10 yrs
	Other Records	5 yrs
Graduation Evaluation (3)	Documents Related to Graduation	10 yrs
	Electronic or Paper Confirmation of Degree Complete	75 yrs
	Diploma Replacement Requests	1 yr
Student Academic Advising Records (4)	Records Kept by Registrar Office of Student Progress	1 yr
Student Academic Records (5)	Transcripts, Academic Standing, Requests for Records	75 yrs
	Final & Articulated Grade Sheets, Change Requests	10 yrs
	International Student Records	5 yrs
	Applications for Admission	3 yrs
	Other Records	1 yr
Veterans Student Records (6)	Includes Correspondence with VA, Academic	3 yrs Following Termination of Enroll
Student Records, Other	166-450-0125 https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=26425	
Agency Sponsored Program (1)	AFS, JOBS, Voc Rehab, VA Jobs & Prep (JTPA), EDP	5 yrs
Cooperative Work Experience (2)	Contracts & Agreements	6 yrs After Expire
	Other Records	10 yrs
Occupational Skills Training (3)	Attendance, Job Perf, Learning Obj, Counseling	1 yr
Peer Assistant Program (4)	Application, Selection, References, Correspondence	1 yr
Placement Service (5)	Records of Student Participation & Placement	1 yr
Services to Students With Disabilities (6)	All Documentation & Records	1 yr After Last Date of Attended
Student Advising & Counseling (7)	Test scores, Planning, & Monitoring, Assessments	5 yrs
Student Exchange Participant (8)	Application, Admissions, Related Documentation	1 yr
Student Government Administrative (9)	Minutes, Constitution, Bylaws, Bills & Resolution, Rosters, Files, Photos	Permanent
	Other Records	3 yrs
Student Grievance (11)	Notices, Complaint, Hearings, Appeals, Related Docs	5 yrs After Resolution
Student Handbooks (12)	Requirements and Policies, Evaluation Process	Permanent
Student Recruitment (12)	Prospect Lists, Interviews, Notes, Transcripts	Current Term
Student Rights & Responsibilities (13)	Codes of Conduct, Rights, Conflict Resolution	6 yrs After Expire
Tutoring Records (14)	Student Hourly, Work Study, Staff, Records, & Memoranda	1 yr

Revisions

*GB Audio Recordings - retention revised 4/30/24

Public Records Storage
Statutory/Other Authority ORS.192.060 & ORS 192.105
Statutes/Other Implemented: 357.825(2), 357.855 & 357.895

Archives Division - Chapter 166

Electronic Records Management Systems		Division 17	https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=559
	Purpose	166-017-0005	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25684
	Definitions	166-017-0010	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25685
	General Requirements	166-017-0015	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25687
	Electronic Records Management Sys	166-017-0025	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25690
	Digitization Standards	116-017-0035	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25693
	Electronic Record as Official Copy of Public Record	116-017-0045	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25696
	Security Standards	116-017-0055	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25699
	Interoperability Standards	116-017-0065	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25702
	Maintenance & Backup	116-017-0075	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25705
	Records Retention Requirements	116-017-0085	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25709
	Records Destruction Requirements for Electronic Records	116-017-0090	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25710
	Use of Alternate Formats & New Tech for Public Records	116-017-0095	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25711

Protection & Storage of Public Records		Division 20	https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=560
	Purpose	166-020-0005	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25712
	Definitions	166-020-0007	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25715
	Duties of Public Records Custodians	166-020-0010	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25717
	Storage Area Standards	166-020-0015	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25723
	Essential Records Systems, ID, Storage	166-020-0045	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25741

Microfilm Standards		Division 25	https://secure.sos.state.or.us/oard/displayDivisionRules.action?selectedDivision=561
	Purpose & Application of Standards Rules	166-025-0005	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25750
	Definitions	166-025-0010	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25752
	Tech Spec for Generations	166-025-0015	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25754
	Targets & Certifications	166-025-0020	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25756
	Hybrid Systems	166-025-0021	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25758
	Target & Certification (Hybrid Systems)	166-025-0022	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25759
	Storage of Security Microfilm	166-025-0025	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25760
	Security Copy of Depository	166-025-0030	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25762
	Microfilm as Official Copy of Public Record	166-025-0035	https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=25764

Financial Aid Standards 2018-2019 FSA Handbook PDF <https://ifap.ed.gov/fsahandbook/attachments/1819FSAHbkVol2Ch7.pdf>

Chapter 7 - Record Keeping, Privacy & Electronic Process

IFAP Record Maintenance: Acceptable Formats CFR DCL Pg 2-191
FTC Standards for Safeguarding Customer Information CRF DCL Pg 2-207