



DOR section and number	Series title	Retention – full or selective	Rule approved or to be determined?	Primary Office(s)
AD - Administration				
AD005	Administrative Planning and Reporting	Selective	Approved rule (2014)	All offices
AD020	Associations and Societies	Selective	Approved rule (2014)	All offices
AD035-30	Auditing – External Audits, Reviews, and Investigations	Selective	Approved rule (2014)	All offices
AD070	Ceremonies and Events co-ordination	Selective	TBD	Ceremonies
AD080	Committees	Selective	Approved rule (2014)	Office of the Chair or Secretary of the Committee
AD090	Contracts and Agreements	Selective	TBD	All Units
AD165	Fundraising	Selective	TBD	External Relations, President
AD165-20	Fundraising – donor case files	Selective	TBD	External Relations
AD185	Government Liaison	Selective	TBD	President, VPFO, VPAC, USEC, Co-op
AD310	Equipment and Supplies Control	Selective	Approved rule (2014)	All offices



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AD320	Photo Services	Selective	TBD	Photo Services
AD360	Records Disposition	Selective	TBD	University Archives
AD365	Records Management	Selective	TBD	University Archives
<b>BP – Buildings and Properties</b>				
BP050	Buildings Maintenance	Selective	TBD	FMGT
BP065	Campus Planning	Selective	TBD	FMGT
BP230	Utilities	Selective	TBD	FMGT
BP275	Properties Maintenance	Selective	TBD	FMGT
<b>FM – Financial Management</b>				
FM060-20	Budget	Full	TBD	Budget
FM140-02	Endowment Management	Selective	Approved rule (2000)	ACCT, Development
FM140-30	Endowment case files	Full	Approved rule (2000)	ACCT
FM155-04	General Ledger	Selective	Approved rule (2000)	ACCT
FM225-02	Insurance Policy	Selective	Approved rule (2000)	ACCT



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FM225-20	Insurance Claim case files	Selective	Approved rule (2000)	ACCT
<b>Revise:</b> FM330-02	Pension Plan Agreements	Full	Approved rule (1997)	ACCT, Pensions
<b>Revise:</b> FM330-04	Minutes of Pension Plan Boards and Committees	Full	Approved rule (1997)	ACCT, Pensions
FM375-04	Financial Statements	Full	Approved rule (2000)	ACCT
FM375-08	Statistical Reporting	Selective	TBD	ACCT, Institutional Analysis
<b>GV - Governance</b>				
GV020	Chancellor	Selective	Approved rule (2015)	USEC
GV060-03	BOG Administration	Selective	Approved rule (2015)	USEC
GV060-20	BOG – Dockets and Minutes	Full	Approved rule (2015)	USEC
GV065	BOG Committees – Dockets and Minutes	Full	Approved rule (2015)	USEC
GV075-06	Published Calendar	Full	Approved rule (1997)	USEC
GV085-06	Convocation Programs	Full	Approved rule (1997)	USEC
GV140	Convocation Roll Administration	Selective	Approved rule (2015)	USEC
GV145-04	Faculties – Minutes	Full	Approved rule (1997)	Faculties
GV145-20	Faculties – Dockets	Full	Approved rule (1997)	Faculties



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GV160	Elections	Selective	Approved rule (2015)	USEC, Offices in charge of election or ratification
GV260-20	Contracts, Leases and Agreements	Selective	Approved rule (1998)	President, VPAC, VPFO, VPRE, USEC
GV260-30	Freedom of Information Requests	Selective	Approved rule (2015)	USEC
GV260-35	Privacy	Selective	Approved rule (2015)	USEC
GV260-40	Human Rights case files	Selective	Approved rule (1998)	USEC, VPFO (General Counsel)
GV260-50	Land Titles	Full	Approved rule (1998)	USEC, President, VPFO, FMGT
GV260-60	Legal Actions and Judgements	Full	Approved rule (1998)	VPFO (General Counsel), USEC
GV260-70	Legal Opinions	Full	Approved rule (1998)	President, USEC, VPFO (General Counsel), VPAC, VPFO
GV330-02	Policies and Procedures	Selective	Approved rule (2015)	USEC
GV415	Senate Administration	Full	Approved rule (2015)	USEC



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GV415-20	Senate – Dockets and Minutes	Full	Approved rule (2015)	USEC
GV420-00	Senate Committees Administration	Full	Approved rule (2015)	USEC
GV420-10	Senate Committee on Agenda and Governance	Full	Approved rule (2015)	USEC
GV420-15	Senate Committee on Planning	Full	Approved rule (2015)	VPAC, USEC
GV420-20	Senate Committee on Curriculum	Full	Approved rule (2015)	OREG, USEC
GV420-25	Senate Committee on Academic Standards	Full	Approved rule (2015)	USEC
GV420-35	Senate Committee on Appeals	Selective	Approved rule (2015)	USEC
GV420-40	Senate Committee on Awards	Selective	Approved rule (2015)	OREG - SAFA, USEC
GV420-45	Senate Committee on Learning and Teaching	Full	Approved rule (2015)	USEC
GV420-50	Senate Committee on Continuing Studies	Full	Approved rule (2015)	Continuing Studies (Dean's Office), USEC
GV420-55	Senate Committee on Libraries	Full	Approved rule (2015)	University Librarian's Office, USEC



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GV420-60	Senate Committee on Honorary Degrees and Other Forms of Recognition	Full	Approved rule (2015)	USEC
GV420-65	Senate Committee on University Budget	Full	Approved rule (2015)	USEC
GV420-70	Senate Ad Hoc Committees	Selective	Approved rule (2015)	USEC
<b>HR – Human Resources</b>				
HR010-20	President Search case files	Selective	Approved rule (2015)	USEC
HR010-40	Senior Administrative Search case files	Selective	Approved rule (1995)	President, VPAC, VPFO, Faculties, Academic Units
HR020-20	Continuing/ Regular Employees	Selective	Approved rule (2016)	VPAC (Faculty), HR (Other staff), Departmental Offices (while active)
HR030-20	Performance Files: Regular Faculty and Librarians	Selective	Approved rule (2016)	Deans, Chairs, University Librarian, VPAC
HR110-20	Job Description files	Selective	Approved rule (2016)	HR



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HR120-35	Arbitration	Full	Approved rule (2016)	HR, President, Vice-Presidents
HR120-40	Appeals	Full	Approved rule (2016)	HR, President, Vice-Presidents
HR120-45	Grievances	Selective	Approved rule (2016)	HR, VPAC (Faculty & Librarians)
HR145-02	Equity Compliance reports	Full	Approved rule (1995)	VPFO (General Counsel)
HR145-20	Equity Issues case files	Selective	Approved rule (1995)	VPFO (General Counsel), VPAC, President (old files)
HR375-02	General Reports	Selective	Approved rule (1995)	VPAC, HR, VPFO, ACCT, Institutional Analysis
<b>LA – Libraries, Archives and Museum</b>				
LA040	Archives Services	Selective	TBD	University Archives
LA085	Collection Development and Maintenance	Selective	TBD	University Librarian



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LA185	Gifts and Exchanges	Selective	TBD	University Librarian
LA295	Museum and Gallery Management	Selective	TBD	Maltwood Art Museum and Gallery
<b>RE – Research</b>				
RE020	Research Contracts and Agreements	Selective	TBD	ORS
RE030	Human Research Ethics	Selective	TBD	ORS, VPRE for MOUs and agreements
RE040	Animal Care	Selective	TBD	ORS
RE060	Research Support	Selective	TBD	ORS, VPRE, EXTR, VPFO (General Counsel)
RE070	Research Centres	Selective	TBD	VPRE, Centres and Institutes
<b>SR – Student Records</b>				
SRO90	Student Awards	Selective	<i>Approved rule (2017)</i>	SAFA, Office responsible for administration of award
SR100-02SR100-02	Examination Questions	Selective	Approved rule (2017)	Registrar, Academic Units





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SR200	Reports and Statistics	Selective	Approved rule (2017)	Registrar, VPAC, Institutional Analysis, Co-op
SR030-20	Student Academic Records – Undergraduate	Selective (Retain records in Banner)	Approved rule (2017)	OREG, Academic Units, Deans
SR030-30	Student Academic Records – Graduate Students	Selective (Retain records in Banner)	Approved rule (2017)	Graduate Admissions and Records
SR030-40	Student Academic Records – Continuing Studies Students	Selective	Approved rule (2017)	Continuing Studies
<b>SS – Student Services</b>				
SS045	Athletic Services	Selective	TBD	Athletics and Recreational Services
SS085-20	Counselling case files	Selective (Keep if there are legal proceedings)	Approved rule (1997)	Counselling Services
SS250-20	International & Exchange Student Services – Exchange Student case files	Selective (15 year selection)	Approved rule (1997)	Student Affairs



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SS445-20	Special Student Services – Deceased Student case files	Full	Approved rule (1997)	Student Affairs
SS445-30	Special Student Services – Disabled Student case files	Selective (15 year selection)	Approved rule (1997)	Student Affairs
SS445-40	Special Student Services – Student Non-academic Discipline case files	Selective (15 year selection)	Approved rule (1997)	Student Affairs
<b>TP – Teaching Programs</b>				
TP010	Academic Liaison Services	Selective	TBD	VPAC, Co-op, Faculties
TP015	Accreditation	Selective	TBD	Engineering, Human and Social Development
TP085	Continuing Education Programs	Selective	TBD	Continuing Studies
TP090	Co-operative Education	Selective	TBD	Co-op, VPAC, Academic Units
TP130	Departmental Review	Selective	TBD	VPAC
TP335	Program Development	Selective	TBD	VPAC, Co-op, Faculty and Academic Units