### Records Retention Schedule

<table>
<thead>
<tr>
<th>4. AGENCY TITLE</th>
<th>5. OFFICE OF RECORD</th>
<th>6. RECORDS COORDINATOR (Typed)</th>
<th>7. SIGNATURE</th>
<th>8. PHONE</th>
<th>9. DATE OF SUBMITTAL</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eastern Washington University</td>
<td>History</td>
<td>Patricia Masiello</td>
<td>(509) 359-2337</td>
<td>4/2/03</td>
<td></td>
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</tbody>
</table>

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</thead>
<tbody>
<tr>
<td>1.</td>
<td>GENERAL CORRESPONDENCE *</td>
<td>OFM</td>
<td>FY</td>
<td>2 yrs.</td>
<td>2 yrs.</td>
<td>GS 09005</td>
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<tr>
<td></td>
<td>Memoranda, routine letters, messages and related documents of a general nature sent or received by an office.</td>
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<tr>
<td>2.</td>
<td>APPLICATION FOR FACULTY EMPLOYMENT (Not hired)</td>
<td>OFM Human Resources*</td>
<td>FY</td>
<td>2 yrs.</td>
<td>2 yrs.</td>
<td>GS 03022</td>
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<tr>
<td></td>
<td>Documents applicants' qualifications for employment and personal employment and personal employment history.</td>
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</tr>
<tr>
<td>3.</td>
<td>MEMORANDUM OF AGREEMENT/PERSOMAL SERVICES INVOICE VOUCHER</td>
<td>OFM Purchasing*</td>
<td>TOC</td>
<td>3 yrs.</td>
<td>3 yrs.</td>
<td>GS 01051</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Documents record of agreement between the university and the contractor for specific services amounting to under $5,000. Includes Personal Services Invoice Voucher for billing and payment purposes. Contracts over $5,000 will utilize state form 110.</td>
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<tr>
<td>4.</td>
<td>PURCHASE ORDER</td>
<td>OFM Purchasing*</td>
<td>FY</td>
<td>1 yr.</td>
<td>1 yr.</td>
<td>GS 01004</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Documents purchase of supplies, equipment and services from off campus vendors.</td>
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</tbody>
</table>

18. AGENCY RECORDS OFFICER (Signature): 

FOR THE ATTORNEY GENERAL: 
FOR THE STATE AUDITOR: 
FOR THE STATE ARCHIVIST: 
FOR THE DIRECTOR OF OFM: 

**ACTION BY THE STATE RECORDS COMMITTEE**

- Approved
- Approved As Amended
- Disapproved
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<tbody>
<tr>
<td>5.</td>
<td>TRAVEL AUTHORIZATION AND EXPENSE VOUCHER&lt;br&gt;Document authorized travel estimates expenses and reimbursements. Includes travel expense voucher.</td>
<td>OFM</td>
<td>Accounts Payable*</td>
<td>FY</td>
<td>2 yrs.</td>
<td>0</td>
<td>2 yrs.</td>
<td>GS 07002</td>
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</tr>
<tr>
<td>6.</td>
<td>BUDGET REVISION&lt;br&gt;Documents and authorizes transfer of funds between budget accounts.</td>
<td>OFM</td>
<td>Budget Services*</td>
<td>FY</td>
<td>1 yr.</td>
<td>0</td>
<td>1 yr.</td>
<td>GS 01040</td>
<td></td>
</tr>
<tr>
<td>7.</td>
<td>STUDENT RECORD FOLDER&lt;br&gt;Documents academic progress of graduate and undergraduate majors, active and inactive. Includes applications, transcripts, grade reports and copies or research papers.</td>
<td>OFM</td>
<td>Registrar*</td>
<td>Graduation or withdrawal</td>
<td>1 yr.</td>
<td>9 yrs.</td>
<td>10 yrs.</td>
<td>80-9-25674</td>
<td></td>
</tr>
<tr>
<td>8.</td>
<td>BOOK ORDER&lt;br&gt;Departmental copy documenting textbook orders placed with the university bookstore.</td>
<td>OFM</td>
<td></td>
<td>FY</td>
<td>3 yrs.</td>
<td>0</td>
<td>3 yrs.</td>
<td>80-9-25675</td>
<td></td>
</tr>
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18. AGENCY RECORDS OFFICER (Signature)

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FOR THE STATE AUDITOR
FOR THE STATE ARCHIVIST
FOR THE DIRECTOR OF OFM

ACTION BY THE STATE RECORDS COMMITTEE
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<tbody>
<tr>
<td>9.</td>
<td>PERSONNEL RECORD FOLDERS (Classified) Provides an employment record for classified staff, includes employment application, references, request to fill/change position and payroll action form showing title, salary, changes in employment status and service dates.</td>
<td>OFM</td>
<td>Human Resources*</td>
<td>TOE</td>
<td>1 yr.</td>
<td>0</td>
<td>1 yr.</td>
<td>GS 03001</td>
<td></td>
</tr>
<tr>
<td>10.</td>
<td>PERSONNEL RECORD FOLDER (Faculty) Documents employment history with the department. Includes all records related to initial appointment, probationary appointment, the granting of tenure and promotions.</td>
<td>OFM</td>
<td>Academic Personnel*</td>
<td>TOE</td>
<td>1 yr.</td>
<td>0</td>
<td>1 yr.</td>
<td>GS 03001</td>
<td></td>
</tr>
<tr>
<td>11.</td>
<td>PART-TIME EMPLOYMENT/PERSONNEL ACTION Record of employment at EWU. Identifies rate of pay, employing department and classification of student employees.</td>
<td>OFM</td>
<td>Payroll*</td>
<td>US</td>
<td>1 yr.</td>
<td>0</td>
<td>1 yrs.</td>
<td>GS 03001</td>
<td></td>
</tr>
<tr>
<td>12.</td>
<td>EMPLOYEE PERFORMANCE EVALUATION (HEPB-029) Annual evaluation of employee performance containing recommendations for improved performance and/or reprimands.</td>
<td>OFM</td>
<td>Human Resources*</td>
<td>FY</td>
<td>1 yr.</td>
<td>0</td>
<td>1 yr.</td>
<td>GS 03002</td>
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</tr>
<tr>
<td>13.</td>
<td>BI-MONTHLY TIME SHEET Provides an official record of hours worked, overtime and leave accrued and taken.</td>
<td>OFM</td>
<td>Human Resources*</td>
<td>FY</td>
<td>3 yrs.</td>
<td>0</td>
<td>3 yrs.</td>
<td>GS 03001</td>
<td></td>
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18. AGENCY RECORDS OFFICER (Signature) FOR THE ATTORNEY GENERAL FOR THE STATE AUDITOR FOR THE STATE ARCHIVIST FOR THE DIRECTOR OF OFM

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<td>4/2/03</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NO.</th>
<th>RECORD SERIES TITLE &amp; STATEMENT OF FUNCTION/PURPOSE</th>
<th>OPR OR OFM</th>
<th>LOCATION OF OTHER COPIES</th>
<th>CUT-OFF</th>
<th>OFFICE RETENTION</th>
<th>RCBS. CTR. RETENTION</th>
<th>TOTAL RETENTION</th>
<th>DISPOSITION AUTHORITY NUMBER</th>
<th>REMARKS</th>
</tr>
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<tbody>
<tr>
<td>14</td>
<td>REQUEST FOR LEAVE AND/OR OVERTIME *</td>
<td>OFM</td>
<td>Employee</td>
<td>FY</td>
<td>6 yrs.</td>
<td>6 yrs.</td>
<td>EWU-GS 1</td>
<td>Item 8</td>
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<tr>
<td></td>
<td>Documents requests for leave of absence for sick leave, overtime, leave without pay or other authorized absences.</td>
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<tr>
<td>15</td>
<td>RECOMMENDATION ON RETENTION, PROMOTION, TENURE</td>
<td>OFM</td>
<td>Academic Affairs*</td>
<td>FY</td>
<td>4 yrs.</td>
<td>4 yrs.</td>
<td>86-10-37612</td>
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<tr>
<td></td>
<td>Official recommendation and evidence documenting retention, promotion and tenure decisions.</td>
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<tr>
<td>16</td>
<td>REGISTRATION COUNT</td>
<td>OFM</td>
<td>FY</td>
<td>6 yrs.</td>
<td>6 yrs.</td>
<td>86-10-37614</td>
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<tr>
<td></td>
<td>Status summary of quarterly registration count of each class. Includes course title, credit hours, class days and time, building and room number, student enrollment and maximum enrollment allowed in each class.</td>
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</tr>
<tr>
<td>17</td>
<td>UNDERGRADUATE COURSE DESCRIPTION APPROVAL</td>
<td>OFM</td>
<td>Academic Affairs*</td>
<td>Until withdrawn</td>
<td>1 yr.</td>
<td>1 yr.</td>
<td>80-10-37615</td>
<td>Review for Archives</td>
<td></td>
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<tr>
<td></td>
<td>Documents rationale for courses offered. Includes outlines, proposed texts and bibliography, instructional methods, description and course prerequisites.</td>
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<td>(Signature)</td>
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ACTION BY THE STATE RECORDS COMMITTEE: ☐ Approved, VII ☐ Approved As Amended, ☐ VIII Disapproved
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</thead>
<tbody>
<tr>
<td>Eastern Washington University</td>
<td>History</td>
<td>Patricia Masiello</td>
<td>OFM</td>
<td>General Accounting*</td>
<td>MO</td>
<td>1 mo.</td>
<td>0</td>
<td>1 mo.</td>
<td>EWU-GS 2</td>
<td>95-07-55625</td>
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<tr>
<td>FINANCIAL REPORTING SYSTEM REPORT</td>
<td>Monthly computer printout documenting budget status and current month expenditures summary by fund and object.</td>
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</tr>
<tr>
<td>COUNSELING REPORT</td>
<td>Provides a record documenting the academic status of student, includes student name, address, social security number, courses taken, credits earned and grade point average. Used for office reference and advising.</td>
<td>OFM</td>
<td>FY</td>
<td>3 yrs.</td>
<td>0</td>
<td>3 yrs.</td>
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<td>97-02-57459</td>
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<tr>
<td>ENROLLMENT PLAN/REQUEST ANALYSIS FILE</td>
<td>Provides a record of analyses used in determining or describing (includes results) the university’s enrollment plan/requests.</td>
<td>OFM</td>
<td>Budget Services*</td>
<td>FY</td>
<td>2 yrs.</td>
<td>0</td>
<td>2 yrs.</td>
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<td>20.</td>
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<tr>
<td>STUDENT EVALUATION OF INSTRUCTOR</td>
<td>Evaluation of faculty teaching effectiveness in each course offered by the department. Serves as feedback mechanism for the individual instructor in the improvement of instruction. Also required evidence for retention and promotion decision.</td>
<td>OFM</td>
<td>FY</td>
<td>5 yrs.</td>
<td>0</td>
<td>5 yrs.</td>
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<td>21.</td>
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<th>REMARKS</th>
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<tbody>
<tr>
<td>22.</td>
<td>INVOICE VOUCHER</td>
<td>OFM</td>
<td>Accounts Payable*</td>
<td>FY</td>
<td>2 yrs.</td>
<td>0</td>
<td>2 yrs.</td>
<td>GS 01004</td>
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</tr>
<tr>
<td></td>
<td>Documents expenditures for equipment, supplies and other miscellaneous items.</td>
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</tr>
<tr>
<td>23.</td>
<td>JOURNAL VOUCHER A7</td>
<td>OFM</td>
<td>General Accounting*</td>
<td>FY</td>
<td>3 yrs.</td>
<td>0</td>
<td>3 yrs.</td>
<td>GS 01006</td>
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</tr>
<tr>
<td></td>
<td>Provides a means of entering an accounting transaction into agency/office account.</td>
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<tr>
<td>24.</td>
<td>INTERDEPARTMENTAL PURCHASE ORDER AND INVOICE</td>
<td>OFM</td>
<td>Supplying Office*</td>
<td>FY</td>
<td>1 yr.</td>
<td>0</td>
<td>1 yr.</td>
<td>EWU-GS2 Item 4</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Documents interdepartmental exchange of services between the university departments.</td>
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</tr>
<tr>
<td>25.</td>
<td>RECORDS RETENTION SCHEDULE</td>
<td>OFM</td>
<td>State Archives* Records Officer</td>
<td>US</td>
<td>1 yr.</td>
<td>0</td>
<td>1 yr.</td>
<td>GS 11003</td>
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</tr>
<tr>
<td></td>
<td>Provides for identification and disposition of all public records found in this office.</td>
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