



University System of Georgia
Creating A More Educated Georgia

Records Management and Archives

Records Retention Schedules

Print friendly Email or share Modified May 3, 2010

The revised schedules for the retention and/or disposition of the following university system records are based upon the requirements of the Georgia Records Act (O.C.G.A. 50-18-90 et seq.). This version includes revised schedules as filed with the Division of Archives and History, Office of Secretary of State as of April 1, 2009.

[USG Records Retention Manual \(Revised March 30, 2010\)](#)

Series:[A: Administration](#) | [B: Academic Affairs](#) | [C: Auxiliary Services](#) | [D: Information Management and Planning](#) | [E: Intercollegiate Athletics](#) | [F: Library/Archives/Records Management and Museum](#) | [G: Human Resources](#) | [H: Publications/Promotions and Alumni Relations](#) | [I: Research](#) | [J: Police/Security and Safety](#) | [K: Student Records](#) | [L: Student Affairs](#) | [M: Finance](#) | [N: Property Management and Control](#) | [O: Legal](#)

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[A1 Professional Accreditation Records](#)

Explanation: This series documents the accreditation process for the colleges, units, and related programs. The series provides a record of materials compiled for inclusion in a report packet sent to the appropriate professional accreditation board for the specific program or service and usually includes statements on mission, finance, educational programs and departments/divisions make up. Most accreditation organizations produce an evaluation report based on the packet and on-site inspection, which is used to determine accreditation for the units and their programs. This series may include but is not limited to: self-evaluation reports; final reports sent to accreditation organization; statistical data; working papers; accreditation organization evaluation report; and related documentation and correspondence.

Record Copy: Institutional Archives; Colleges, Budgets & Planning

Retention: Permanent for self-evaluation reports, final accreditation reports, and accreditation organization evaluation reports; 2 accreditation cycles for statistical reports, working papers, correspondence, and all remaining records

Citation or Reference:

Background Information:

[A2 Administrative Reports](#)

Explanation: This series documents the annual activity of the institution and its subdivisions. This disposition includes reports prepared for the university by the president, vice-president, and deans of the institution. Final annual reports may be printed and bound or they may be less formal unpublished documents prepared for limited distribution. Reports may include but are not limited to periodic statistical reports; summarized statistical reports; copies of reports from other units; other working papers; final annual reports; and related documentation and correspondence.

Record Copy: Institutional Archives; Creating units

Retention: Permanent for final annual reports and periodic and summary statistical reports not reflected in the final annual report; until superseded or obsolete for all other records

Citation or Reference:

Background Information:

[A3 Administrative Rules Records](#)

Explanation: This series documents reviews of and changes to the institution's Administrative Rules, including routine reviews and the annual preparation and authorization of the institution's administrative fees. Records may include but are not limited to

notices of rule making with hearing notices; documentation of rule change hearings; reports to initiators of changes regarding outcome; final rules; Reports of Action to the State Administrative Rule Section including Certificates and Orders for Filing Permanent Administrative Rules with the Secretary of State; Notices of Proposed Adoption including statements on statutory authority, need/principle, documents relied upon, and statement of fiscal impact; lists of proposed fee schedules; reviewers' comments; administrative review reports; text of old rule with strike outs and changes; and, related correspondence. The Georgia Secretary of State holds the statewide record copy.

Record Copy: Legal Advisor, Business Affairs

Retention: 5 years after expiration.

Citation or Reference: O.C.G.A. 50-13-1-44

Background Information:

A4 Advisory Board Records

Explanation: This series documents the activities of boards and councils, which function in an advisory capacity. Boards and councils may have as their charge highly specific or broad areas of concern and include members from outside the institution. This series may include but is not limited to meeting minutes; agendas; reports; notes; working papers; audio recordings; transcriptions; and related documentation and correspondence.

Record Copy: Institutional Archives; Colleges & Units

Retention: Permanent for minutes, agendas, reports, and correspondence; 3 years for all other records

Citation or Reference:

Background Information:

A5 Affirmative Action Audits and Annual Reports

Explanation: This series documents the institution's response to federal program reviews, state compliance audits, annual reporting requirements, and internal audits. This series may include but is not limited to: audit reports; written responses showing how compliance will be accomplished; Equal Employment Opportunity (EEO-6) Reports; Vets 100 Employment Reports; final biennial plans and policy statements; executive department printouts; Affirmative Action (AA) policies and procedures; AA mission and goals; AA office reviews; departmental reports; status reports on minority action programs; AA compliance data sheets; guidelines; specific case histories; discrimination complaints; and related documentation and correspondence.

Record Copy: Affirmative Action Office, Institutional Archives

Retention: Permanent for plans; 2 years for all other records.

Citation or Reference: 29 C.F.R. 1602.48; 41 C.F.R. 60

Background Information:

A6 Affirmative Action Compliance Records

Explanation: This series documents Affirmative Action's development, efforts and accomplishments. (Page 2)

Record Copy:

Retention: 2 years.

Citation or Reference:

Background Information:

A7 Agency Relations Records

Explanation: This series documents the institutional interactions with local, state, national, and international government agencies, educational institutions, businesses and groups to gain their assistance with the development and coordination of institution research and instructional programs. This series may include but is not limited to: reports; copies of publications; minutes; background information; and related documentation and correspondence.

Record Copy: Colleges & units

Retention: 7 years.

Citation or Reference: O.C.G.A. 9-3-24

Background Information:

A8 Association and Organization Advisory Records

Explanation: This series documents the relationship and participation of institution units in professional and educational associations and other organizations. The unit's role may be one of membership on the advisory or administrative board, participation in a task force or subcommittee, or one of membership in consortia. This series may include but is not limited to: promotional information; rules and regulations; reports; proposals and planning records; workshop and conference records; surveys and questionnaires; minutes; and related documentation and correspondence. This series does not include individual faculty or staff membership information.

Record Copy: Colleges & units

Retention: 3yrs

Citation or Reference:

Background Information:

A9 Audit Report

Explanation: Moved to Series: M43, Category: Finance

Record Copy:

Retention:

Citation or Reference:

Background Information: [Moved to Series: M43. Category: Finance](#)

A10 Awards Records

Explanation: This series documents the process of selecting institutional faculty, staff, students and alumni to receive awards, fellowships, and scholarships based on merit or achievement. The series may include but is not limited to: applications; nomination letters; eligibility terms and selection criteria; recommendations; transcripts; letters of award notification or denial; letters accepting or declining awards; summary lists of winners; biographies; demonstration of need documentation; press releases; award history and information on funding sources; and related documentation and correspondence.

Record Copy: Institutional Archives; Administering units

Retention: Permanent for eligibility terms and selection criteria, award history and information on funding sources, award notifications, summary lists of winners, biographies of winners, and press releases; 1 year for all other records

Citation or Reference:

Background Information:
