

AD2570 RESEARCH ACCOUNTING

Records documenting the administration of research funds and grants at Financial Services.

Not used for University Accounting, see AD2500.

Example documents include but are not limited to year-end financial statements, correspondence.

University Records exist in both physical and electronic formats, such as paper, email or data in a database. Paper records may or may not contain information that is duplicated in an electronic system. For technical reasons the retention assigned to the electronic records may be different from the retention of physical records. If there are differences, see instructions in this schedule for details.

OPR - Research Accounting

(Unless otherwise assigned, see below)

NO.	TYPE OF RECORD	Active yr(s)	Semi-Active	Dis-position	Personal Info
31	Research Project Files (Accounting)	ET + 1	6	D	PIB
	<i>Records documenting routine balancing and status reports reflecting expenditures and receipts of a research project.</i>				
	<i>ET Definition: Research project closed.</i>				
	Retention based on anticipated operational use.				

This schedule applies to official records. Convenience or duplicate copies of official records should not be kept longer than necessary, and in no event longer than the official copy.

GLOSSARY

FY = Fiscal Year (May 1 to April 30)

AY = Academic Year (September 1 to August 31)

CY = Calendar Year (January 1 to December 31)

ET = Event Trigger

OPR = Office of Primary Responsibility

DP = Special Disposition Plan

AR = Transfer to Archives

D = Destroy / Delete

PIB = Personal Information Bank

AD2570 was approved on 04/04/2017.