

Schedule F Information and Records Management--UMass Boston Paper Retention Schedule (Based on Massachusetts Secretary of State schedule)								
Record Type	Record Category	Record Sub-Category Code	Record Sub-Category Title	Description	Owner	UMB Standard Retention Schedule	Retention Schedule Begins	Notes
F Information and Records Management	F1 Unclassified	F1-1	Blank Forms Stock	Consists of blank forms. Form types include business forms, letterhead, phone slip tablets, and card stock.	Department	(a) Hard copy master set of current and superseded forms: Permanent. (b) All other records: Retain until administrative use ceases.	Upon creation.	
F Information and Records Management	F1 Unclassified	F1-2	Publication Stock	Consists of copies of printed materials created and/or stored by the department. Publications include books, journals, catalogs, brochures, flyers, posters, business cards, and other stand-alone items.	Department	Create and follow a diminishing inventory schedule by publication title and publication date, where stock is reduced each year.	After administrative use ceases.	
F Information and Records Management	F1 Unclassified	F1-3	Returned Mail	Consists of official business notifications or other mailings that were undeliverable and returned to the department where the department may need to account for the mailed documents.	Department	(a) Records that need to be accounted for: 1 year. (b) All other records: Retain until administrative use ceases.	Upon creation.	
F Information and Records Management	F1 Unclassified	F1-4	Dead Letter File	Consists of incoming mail that cannot be acted upon due to insufficient information such as lack of a return address or sender name.	Department	Retain until administrative use ceases.	Upon creation.	
F Information and Records Management	F1 Unclassified	F1-5	Unused Permits, Certificates, Decals, and Stickers	Consists of blank copies of damaged, returned, unsold, voided, or otherwise unused copies of permits, licenses, certificates, decals, stickers, stamps, tickets, or checks that will not be used, but that need to be accounted for.	Department	(a) Destroy immediately after audit unless otherwise specified. (b) Audit and destruction documentation: 10 years.	Upon creation.	

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F Information and Records Management	F1 Unclassified	F1-6	Damaged/Contaminated Files	Consists of files that were damaged to the point where they cannot be salvaged or may not be worth salvaging. Includes the damaged materials, file inventories, assessments, and related correspondence.	Department	Upon discovery of damage, contact archives for review and damage assessment.	Upon discovery.	
F Information and Records Management	F1 Unclassified	F1-7	Old Records	Consists of old records that have been abandoned, stored without disposition schedules, or otherwise neglected.	Department/University Archives and Special Collections	(a) Records older than 1870 must be retained permanently by statute. (b) Records older than 50 years old: Review by the Archives to determine if the materials have historical value.	Upon discovery.	
F Information and Records Management	F2 Reference	F2-1	Reference/Resource Materials	Consists of general reference materials collected from sources outside of the campus. Includes reference manuals, directories, catalogs, books, articles, and similar items.	Department	Retain until administrative use ceases.	Upon creation.	
F Information and Records Management	F2 Reference	F2-2	Systems Manuals and Technical Reference Materials	Consists of reference manuals for computer hardware and applications.	Department	Retain until administrative use ceases.	Upon creation.	
F Information and Records Management	F2 Reference	F2-3	Referral Resource Files	Consists of alternative sources of information related to campus functions and programs maintained for the purposes of referral.	Department	Retain until administrative use ceases.	Upon creation.	
F Information and Records Management	F3 Facilitative	F3-3	Drafts and Notes	Consists of drafts and notes relating to campus business.	Department	(a) Substantive materials: Retain according to the retention period of the related record series. (b) Random notes and copyedit drafts: Retain until administrative use ceases.	Upon creation.	

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F Information and Records Management	F3 Facilitative	F3-4	Document Composition Materials	Consists of materials created during the process to draw up, design, or develop layouts for individual documents such as memos, letters, reports, plans, and publications. Includes informal notes, shorthand, sketches, worksheets, outlines, design and layout trial sheets, and rough drafts.	Department	Retain until administrative use ceases.	Upon creation.	
F Information and Records Management	F5 System Infrastructure	F5-3	Website Documentation and Content Records	Documents the design, construction, use, and content of campus and department websites. Includes general description of site purpose, description of major features and sections, diagrams and descriptive lists of links, description of data sources, screen dumps of major pages, electronic snapshots, and related correspondence.	Department	(a) Summary documentation describing major aspects, use, design, and content of the site, as well as any major changes, restructuring, page screen dumps, and webpage screenshots: Permanent. (b) All other records: Retain until administrative use ceases.	Upon creation.	All records for www.umb.edu are kept electronically on the website wiki.
F Information and Records Management	F6 System Operations	F6-1	Records Management Records	Documents the storage, retrieval, and final disposition of campus records whether these are on-site, in the records center, or in the archives. Includes box storage transmittal forms, file and box inventory lists, retrieval requests and notes, records center delivery manifests, destruction approvals, electronic records deletion reports, and related correspondence.	Contracts & Compliance / University Archives and Special Collections	(a) Record retention schedules: Permanent. (b) Archival transfer documentation: Permanent. (c) Record inventories and surveys: Retain until administrative use ceases. (d) Destruction documentation: Retain 10 years. (e) All other records: Retain 3 years.	Upon creation.	
F Information and Records Management	F7 System Data	F7-5	Database Content Records	Consists of campus data input or otherwise captured by database applications.	Department	Retain based on the retention period for the appropriate record series as determined by the content and function of the data.	After administrative use ceases.	