Record Storing and Retention Requirements

Dear Principal Investigator,

The following information discusses the requirements for storing sponsored research records and financials.

Please fill out and sign the attached Record Retention Form and submit it to the Budget Office for our records. Records must be kept for at least five years after the closing date of each grant. If you have records that are more than five years old and can be shredded, please fill out the attached Destroyed Record Summary Form and submit it to our office. The Destroy Date should be five years after the end date of the grant. For example, if your grant ended on 9/30/2009, the destroy date is 10/1/2014.

Additionally, please complete the attached label template and provide copies of the completed forms to the budget office so we have a record of what you will be sending to the Facilities Operations.

Please contact the Budget Office to acquire about the box numbers available. The size of the banker’s boxes that you must use is 10”Hx12”Wx24”D. If you order from Office Depot, the item number is 342073 (pack of 12). Storage boxes are required to have strings and buttons on the sides. This is the only type of box Facilities Operations will accept.

Please let us know if you have any question.

Signature,

Eric Brewington
Budget Office
Coordinator of Administrative Services