

# RECORDS RETENTION AND DISPOSITION SCHEDULE

## The University of North Carolina at Chapel Hill College of Arts and Science Department of Classics

### **CHAIR'S OFFICE**

(Electronic file maintenance is provided by and security copies of electronic data are backed up by the Office of Arts and Sciences Information Systems.)

**Item 1. Academic Committees File.** AutoText 01 (7/19/01)

Record copies created and/or maintained in paper and electronic formats concerning school/department academic committees. File includes correspondence, minutes of meetings, notifications, reports, and other related records.

**Disposition Instructions:** Transfer paper records to the custody of the University Archives after 5 years for appraisal and final disposition. Erase in office electronic records when administrative value ends and after records have been printed and filed into the office's filing system for eventual transfer to the University Archives.

**Item 2. Accreditation File.** AutoText 03 (7/19/01)

Record copies created and/or maintained in paper and electronic formats concerning school/program accreditation. File includes correspondence, guides, questionnaires, reports, and other related records.

**Disposition Instructions:** Transfer paper records of previous accreditation to the custody of the University Archives immediately after accreditation process is completed for appraisal and final disposition. Erase in office electronic records when administrative value ends and after records have been printed and filed into the office's filing system for eventual transfer to the University Archives.

**Item 3. Annual Reports File.** AutoText 06 (7/19/01)

Record copies of annual reports created and/or maintained in paper and electronic formats concerning departmental activities.

**Disposition Instructions:** Transfer paper records to the custody of the University Archives after 5 years for appraisal and final disposition. Erase in office electronic records when administrative value ends and after records have been printed and filed into the office's filing system for eventual transfer to the University Archives.

**Item 4. Applications for Admission to Program (Enrolled Students) File. (RESTRICTED ACCESS)**  
AutoText 07 (7/15/01)

Records created and/or maintained in paper and electronic formats concerning students enrolled in the program. File includes applications, correspondence, recommendations, and other related records. (Comply with applicable provisions of 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions:** Transfer to Student (Active-Graduate/Professional File) or Student (Active-Undergraduate) File as appropriate immediately upon enrollment.

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**Item 5. Applications for Admission to Program (Students Accepted But Did Not Enroll) File. (RESTRICTED ACCESS)** AutoText 09 (7/15/01)

Records created and/or maintained in paper and electronic formats concerning students admitted into the program, but who did not enroll. File includes applications, correspondence, recommendations, and other related records. (Comply with applicable provisions of 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 1 year after application term.

**Item 6. Applications for Admission to Program (Students Denied Admission) File. (RESTRICTED ACCESS)** AutoText 08 (7/15/01)

Records created and/or maintained in paper and electronic formats concerning students who were denied admission into the program. File includes applications, correspondence, recommendations, and other related records. (Comply with applicable provisions of 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 1 year after application term.

**Item 7. Applications for Graduation File.** AutoText 207 (7/19/01)

Applications/reference copies of applications created and/or maintained in paper and electronic formats for graduation.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 1 year after graduation or date of last attendance.

**Item 8. Budgets File.** AutoText 267 (4-8-2002)

Reference copies of budgetary records created and/or maintained in paper and electronic formats. File includes budget authorizations, budget reports, requests for budget changes, journal entries, and other related records. (Record copies are maintained in the Finance Division (Financial Planning and Budgets) and Accounting Services (440 West Franklin Street) for audit purposes).

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 2 closed fiscal years.

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**Item 9. Class Schedules File.** AutoText 211 (7/19/01)

Reference copies of school/department class schedules created and/or maintained in paper and electronic formats. (Record copies are maintained by Office of University Registrar except for the School of Medicine MD program.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years.

**Item 10. Comprehensive Examinations and Results File. (RESTRICTED ACCESS)** AutoText 15 (7/15/01)

Records created and/or maintained in paper and electronic formats concerning completed student comprehensive examinations for degrees and results. (Comply with 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions:** Transfer to Student (Active-Graduate/Professional) File 1 year after completion.

**Item 11. Contracts and Grants (Awarded) File.** AutoText 268 (4-8-2002)

Reference copies of records created and/or maintained in paper and electronic formats concerning contracts and grants awarded to principal investigators for individual faculty research and/or departmental improvements. File includes contract and grant proposals (applications), notice of award and/or signed contracts, amendments or modifications, subcontract agreements, final progress reports/deliverables, patents or inventions, audit findings, and other related records. (Original records required for financial audits are maintained in the Office of Sponsored Research).

**Disposition Instruction:** Transfer final progress reports/deliverables in paper format to the custody of the University Archives 4 years after termination and final payments, and when released from all audits and when permission is obtained from the Office of Sponsored Research that authorizes transfer of these records to University Archives for appraisal and final disposition. Erase in office electronic versions of final progress reports/deliverables when administrative value ends and after released from all audits and after records have been printed and filed into the office's paper filing system for eventual transfer to the University Archives. Erase/destroy in office remaining records in paper and/or electronic formats when administrative value ends.

**Item 12. Contracts and Grants Proposals (Rejected) File.** AutoText 270 (4-8-2002)

Reference copies of records created and/or maintained in paper and electronic formats concerning rejected contracts and grants proposals submitted by principal investigators for individual faculty research and/or departmental improvements. File includes contract and grant proposals (applications), notices of rejection, and other related records.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 4 years after submission.

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**Item 13. Contracts, Agreements, and Leases File.** AutoText 18 (4/8/2002)

Record copies of contracts, agreements, and leases created and/or maintained in paper and electronic formats concerning services, facilities, and equipment used by school/department.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years after expiration if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

**Item 14. Course Evaluations by Students File.** AutoText 20 (7/15/01)

Records created and/or maintained in paper and electronic formats concerning course evaluations completed by students.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years.

**Item 15. Course Listings File.** AutoText 217 (7/19/01)

Reference copies of course listings created and/or maintained in paper and electronic formats concerning courses currently offered by school/department. Listings include course schedules, enrollment numbers and other related records. (Record copies are maintained by Office of University Registrar, except for the School of Medicine MD Program.)

**Disposition Instructions** Erase/destroy in office records in paper and electronic formats when administrative value ends.

**Item 16. Drop/Add Forms File. (RESTRICTED ACCESS)** AutoText 219 (7/19/01)

Reference copies of completed forms used by students to drop/add courses. (Comply with 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions:** Destroy 1 year after date submitted.

**Item 17. Enrollment File. (RESTRICTED ACCESS)** AutoText 220 (7/19/01)

Reference copies of enrollment reports created and/or maintained in paper and electronic formats concerning students enrolled for each course in school/department. (Record copies maintained by the Office of University Registrar.) (Comply with 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions** Erase/destroy in office records in paper and electronic formats after 5 years.

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#### **Item 18. Examinations, Tests, Term Papers, and Homework Records File. (RESTRICTED ACCESS)**

AutoText 27 (7/15/01)

Records created and/or maintained in paper and electronic formats concerning a student's academic performance. File includes final examination booklets, examination tests and scores, graded term papers, and other related records. (Comply with 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 1 term after completion, if grade results are unchallenged. If challenged, destroy in office after resolution of challenge.

#### **Item 19. Faculty Awards and Honors File.** AutoText 28 (7/15/01)

Record copies of records created and/or maintained in paper and electronic formats concerning awards and honors to faculty members within the school/department. File includes list of recipients, recommendations, and other related records.

**Disposition Instructions:** Transfer paper records to the custody of the University Archives after 5 years for appraisal and final disposition. Erase in office electronic records when administrative value ends and after records have been printed and filed into the office's filing system for eventual transfer to the University Archives.

#### **Item 20. Faculty Listings File.** AutoText 223 (7/19/01)

Reference lists of school/department faculty created and/or maintained in paper and electronic formats.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years.

#### **Item 21. Faculty Recruitment File. (RESTRICTED ACCESS)** AutoText 30 (7/15/01)

Records created in paper and/or electronic formats concerning the recruitment of faculty members for school/department. File includes applications, correspondence, forms, interview notes, policies, reports, resumes, and other related records. (Comply with applicable provisions of General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29, and 132-1.1 regarding confidentiality of personnel records.)

**Disposition Instructions:** Transfer applications and other records of successful candidates to Personnel (EPA) File immediately when official offer of employment is accepted. Erase/destroy in office applications and other records of unsuccessful candidates 3 years after date position is filled, if no charge of discrimination has been filed. If charge has been filed, destroy/erase in office 1 year after resolution of charge.

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**Item 22. Grades File. (Restricted Access)** AutoText 225 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning grades earned by students. File includes Distribution of Grades by Instructors Reports and final grade rolls, except for MD students. (Comply with 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.) (Record copies are maintained by the Office of University Registrar for eventual transfer to University Archives.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years.

**Item 23. Graduate Listings File. (RESTRICTED ACCESS)** AutoText 226 (7/19/01)

Reference copies of listings created and/or maintained in paper and electronic formats concerning student graduates. Listings include student graduate rankings for undergraduates and graduate/professional students. (Comply with 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.) (Record copies are maintained by Office of University Registrar for eventual transfer to University Archives.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years.

**Item 24. Maintenance Services (Facilities) File.** AutoText 232 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning facility maintenance services conducted for school/department. File includes correspondence, maintenance reports, work orders, and other related records. (Record copies are maintained by Facilities Services, Maintenance Management.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 2 years after work is completed.

**Item 25. New Course Proposals File.** AutoText 233 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning each proposed new course. File includes course descriptions, justifications, projected schedules, and other related records.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years.

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**Item 26. Parking Assignments File.** AutoText 236 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning staff parking assignments. File includes applications and lists of staff parking assignments. (Record copies are maintained by the Department of Public Safety, Parking Services.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats when superseded or obsolete.

**Item 27. Permanent Record of Courses File.** AutoText 238 (7/19/01)

Reference copies of lists created and/or maintained in paper and electronic formats providing a permanent record of courses offered by the school/department. (Record copies are maintained by Office of University Registrar.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats when administrative value ends.

**Item 28. Personnel (EPA) File. (RESTRICTED ACCESS)** AutoText 239 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning personnel exempt from provisions of the State Personnel System Act. File includes applications, resumes, job descriptions, personnel action forms, and other related records. (Comply with applicable provisions of General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29 and 132-1.1 regarding the confidentiality of personnel records.)

**Disposition Instructions:** Transfer paper records to the custody of the University Archives 60 years after date of employee's first University appointment for appraisal and final disposition. Erase in office electronic records when administrative value ends and after records have been printed and filed into the office's filing system for eventual transfer to the University Archives.

**Item 29. Personnel (EPA-One-Time-Payments) File. (RESTRICTED ACCESS)** AutoText 240 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning employees hired to fulfill temporary, short-term duties. "One-Time-Payments (OTPs)" apply to honoraria paid to visiting lecturers and consultants as well as to university staff and students who undertake duties outside, and not in conflict with, their regular work. File includes personnel action forms and other related records. (Comply with applicable provisions of General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29, and 132-1.1 regarding the confidentiality of personnel records.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 1 year after payment date and when released from all audits, whichever occurs later.

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**Item 30. Personnel (SPA) File. (RESTRICTED ACCESS)** AutoText 83 (4-8-2002)

Personnel records concerning full time and part time SPA employees. File includes applications for employment, position action forms, letters of reference, and other related records. (Comply with applicable provisions of General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29, and 132-1.1 regarding the confidentiality of personnel records.)

**Disposition Instructions:** Comply with retention instructions outlined in the SPA Personnel Forms Inventory Retention Module (<http://www.ais.unc.edu/hr/records/retention.htm>)

**Item 31. Placement Tests Scores File. (RESTRICTED ACCESS)** AutoText 241 (7/19/01)

Reference copies of placement test scores maintained in paper and electronic formats concerning results of administered tests that are used to determine a student's aptitude. (Record copies for undergraduate students are maintained by the Office of University Registrar.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats 5 years after student's last attendance or date of graduation.

**Item 32. Policies and Procedures File.** AutoText 49 (7/15/01)

Record copies of policies and procedures created and/or maintained in paper and electronic formats concerning office administration.

**Disposition Instructions:** Transfer paper records to the custody of the University Archives after superseded or obsolete for appraisal and final disposition. Erase in office electronic records when administrative value ends and after records have been printed and filed into the office's filing system for eventual transfer to the University Archives.

**Item 33. Prospective Graduates File.** AutoText 244 (7/19/01)

Reference lists created and/or maintained in paper and electronic formats concerning prospective graduates at end of each semester.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 1 year.

**Item 34. Purchase Orders File.** AutoText 246 (7/19/01)

Reference copies of purchase orders created and/or maintained in paper and electronic formats concerning purchases for supplies and equipment. (Record copies are maintained by the Controller's Office (Accounts Payable) and the Materials Support Department for audit purposes.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 2 closed fiscal years.



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**Item 35. Receipts File.** AutoText 247 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats detailing amounts received by department from various sources. File includes ledgers, receipt books, and other related records. (Record copies are maintained by Controller's Office (Accounting Services, Cash Management Office) for audit purposes.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 2 closed fiscal years.

**Item 36. Search Committee (Administrative Officials) File. (RESTRICTED ACCESS)** AutoText 59 (7/15/01)

Record copies of records created and/or maintained in paper and electronic formats concerning activities of specially-formed search committees charged with recruiting new or replacement administrative officials. File includes applications, correspondence, lists of committee members, minutes of meetings, and other related records. (Comply with applicable provisions of General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29, and 132-1.1 regarding the confidentiality of personnel records.)

**Disposition Instructions:** Transfer paper records to the custody of the University Archives 5 years after committee's charge for appraisal and final disposition. Erase in office electronic records when administrative value ends and after records have been printed and filed into the office's filing system for eventual transfer to the University Archives.

**Item 37. Search Committee (For Individual Faculty) File. (RESTRICTED ACCESS)** AutoText 60 (7/15/01)

Record copies of records created and/or maintained in paper and electronic formats concerning activities of specially-formed search committees charged with recruiting new or replacement faculty. File includes applications, correspondence, resumes, and other related records. (Comply with applicable provisions of General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29, and 132-1.1 regarding the confidentiality of personnel records.)

**Disposition Instructions:** Transfer application materials of successful candidates immediately after official offer of employment is accepted to Personnel (EPA) File. Destroy application materials of unsuccessful candidates 2 years after date position is filled, if no charge of discrimination has been filed. If charge has been filed, destroy in office 1 year after resolution of charge.

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**Item 38. Special Gifts File.** AutoText 255 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning special gifts to school/department. File includes accession logs, agreements and stipulations, correspondence, descriptions of gifts, and other related records.

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 5 years.

**Item 39. Student (Reference) File. (RESTRICTED ACCESS)** AutoText 258 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning students' activities within the department. File includes correspondence, promotional literature for internships, student organization rosters, and other related records. (Comply with applicable provisions of 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of student records.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats when administrative value ends.

**Item 40. Supplies and Equipment File.** AutoText 261 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning supplies and equipment. File includes operating manuals, inventories, warranties, accounting statements and other related records.

**Disposition Instructions:** Transfer operating manuals to Materials Support Department, Materials Management and Distribution Division, Surplus Property Office when equipment is surplus. Destroy in office warranties and inventories when superseded or obsolete. Erase/destroy in office remaining records in paper and electronic formats after equipment is surplus and after released from all audits.

**Item 41. Surplus Property File.** AutoText 262 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning surplus property and its disposition. File includes inventories, disposal logs, and other related records. (Record copy maintained by Materials Support Department, Materials Management Distribution Division, Surplus Property.)

**Disposition Instructions:** Erase / destroy in office records in paper and electronic formats 3 years after property disposal if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

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**Item 42. Telephone Billings File.** AutoText 263 (7/19/01)

Reference copies of monthly office telephone bills. (Record copies are maintained in the Academic Technology and Networks, Telecommunications Office for audit purposes.)

**Disposition Instructions:** Destroy in office after 2 closed fiscal years.

**Item 43. Tenure File. (RESTRICTED ACCESS)** AutoText 71 (7/15/01)

Record copies of records created and/or maintained in paper and electronic formats concerning the awarding of tenure to university faculty members. File includes correspondence, recommendations, and other related records. (Comply with applicable provisions of the General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29 and 132-1.1 regarding confidentiality of personnel records.)

**Disposition Instructions:** Transfer to Personnel (EPA) File after 1 year if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, transfer immediately after completion of action and resolution of issues involved.

**Item 44. Tenure File. (RESTRICTED ACCESS)** AutoText 71 (7/15/01)

Record copies of records created and/or maintained in paper and electronic formats concerning the awarding of tenure to university faculty members. File includes correspondence, recommendations, and other related records. (Comply with applicable provisions of the General Statutes of North Carolina 126-22, 126-23, 126-24, 126-29 and 132-1.1 regarding confidentiality of personnel records.)

**Disposition Instructions:** Transfer to Personnel (EPA) File after 1 year if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, transfer immediately after completion of action and resolution of issues involved.

**Item 45. Textbooks Requests and Orders File.** AutoText 264 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning requests and orders of textbooks and other references materials. File includes textbook orders, textbook request forms, and related correspondence. (Record copies are maintained by Student Stores, Textbook Department for audit purposes.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 2 closed fiscal years.

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**Item 46. Transfer Equivalents File. (RESTRICTED ACCESS)** AutoText 73 (7/15/01)

Records created and/or maintained in paper and electronic formats concerning grade transfer equivalents from other institutions. File includes correspondence, transcripts, and other related records. (Comply with applicable provisions of 20 U.S.C. 1232g (Family Educational Rights and Privacy Act of 1974) regarding confidentiality of records.)

**Disposition Instructions:** Transfer to Student (Active-Graduate/ Professional) File or Student (Active-Undergraduate) File as appropriate immediately upon enrollment.

**Item 47. Travel File.** AutoText 265 (7/19/01)

Reference copies of records created and/or maintained in paper and electronic formats concerning travel requests and reimbursements. File includes requests for travel and authorizations, receipts, correspondence, and other related records. (Record copies are maintained by the Controller's Office, Travel Accounting (440 W. Franklin St.) for audit purposes.)

**Disposition Instructions:** Erase/destroy in office records in paper and electronic formats after 2 closed fiscal years.