

Records Retention Schedule

Department Responsible for Retaining	Record Type	Retention Period
ADMISSIONS	Accepted Students, Not Enrolled	3 years
	Denied & Waitlisted Students	3 years
	Confidential Documents — teacher recs, etc.	1 year
	Incomplete Applications	1 year
	Marketing Materials	Permanent
ADVANCEMENT	Alumni Records	Permanent
	Aidan Fund Records	7 years
	Bequests	Permanent
	Deferred Gifts	Permanent
	Donor Files	Permanent
	Income In-Kind	Permanent
	Statements - including perpetual trust	3 years, end of fiscal & calendar year
BUSINESS OFFICE	Aidan Business & Finance Policies	Permanent
	Articles of Incorporation and Bylaws	Permanent
	Audit Reports	Permanent
	Board Committee Minutes	Permanent
	Board Minutes and Packets	Permanent
	Building Drawings and Plans	Permanent
	Canceled Checks (including electronic)	5 years
	Construction and Major Equipment Records	Permanent
	Contract Bids	3 years
	Contracts and Agreements	Permanent

	Deposit slips (including electronic)	3 years
	Financial Aid — award letters and invoices	4 years after student leaves
	Income – bequests	Permanent
	Income – broker statements	3 years
	Inventories	3 years
	Invoices	3 years
	Journals	3 years
	Ledgers – trial balances, A/P, and A/R	3 years
	Legal Opinions	Permanent
	Loan Documentation	Permanent
	Long Range Plans – facilities and strategic	Permanent
	Mortgage and Note Agreements	Permanent
	Property/Real Estate/Zoning Documentation	Permanent
	Reports Required by Federal and State	Permanent
	Student Contracts	7 years
	Time Sheets	5 years
	Vouchers AP & CR	3 years
	W-2s	7 years
COMMUNICATIONS	Constituent Communications	Permanent
	Photographs & Videos	Permanent
	Publications	Permanent
HEAD'S OFFICE / HUMAN RESOURCES	All Items in Aidan Personnel File except for:	6 years after separation
	1. Appointment letters – original & renewals 2. New Hire Forms	Permanent
	Board & Committee Agendas and Materials	Permanent
	Documents Related to Overnight Travel	5 years after graduation
	Employee Initial Benefit Enrollment Forms	6 years past separation
	New Hire Forms	Permanent

	Payroll Change Form	6 years past separation
	Position Descriptions – employee files both electronic and paper	Permanent
	Separation Form	Permanent
	Student Accident Reports	7 years after graduation
	Student Health Forms – graduated and withdrawn	7 years after graduation
	Student Injury Records	7 years after graduation
	Time Sheets	5 years
RECORDS RETENTION COORDINATOR	All Items in Academic File except for:	5 years after graduation
	<ol style="list-style-type: none"> 1. Transcripts 2. Progress reports 3. Narratives 4. Conference reports 5. Notes in student files 	Permanent
	Any testing done in school	Permanent
	Student Learning Diagnostic Files	1 year after graduation