

Records Retention Schedule - Definitions

Definitions

Refer to Records Management Policy, and your local records management site procedures to follow when managing records.

Primary Records

A Primary Record is a record that has on-going business or legal reference value to the Company.

Some Primary Records are given a defined Office of Record on the Records Retention Schedule. The Office of Record is a department. This department has the responsibility to retain the record for its full retention period.

Many times the Office of Record is defined as Various. In these cases, apply these rules:

- The office(s) or person(s) who receives the record(s) from outside of the Company or who creates the record(s)
- Note that office(s) or person(s) who directly receive a record are not considered Office of Record locations.
- Note that office(s) or person(s) who are copied are not considered Office of Record locations.

Temporary Records

Temporary Records are those records that have a relatively short period of usefulness to the business. Once a temporary record is created or received and action is taken or completed, the temporary record is no longer required for business purposes and the record may be disposed unless subject to disposal suspension.

Disposal Suspension

Disposal Suspension is an interruption in the normal disposal of records required by the existence or anticipation of litigation, governmental investigation, tax audit or other legal requirements. A primary or temporary record subject to disposal suspension may not be disposed unless it is an identical copy to the original and its distribution represents the original distribution list. Substantive marginalia creates a new and unique record, and it must be retained as a new disposal suspended record. Please refer to the Records Management Policy.