

Records Management Best Practices

The following best practices for University records and were developed in consultation with each of the noted University's Office of Record.

Each Office of Record is the official record custodian for the list of records and said records should reside within the noted Office of Record or in the authorized offices described. The official record custodian retains their respective records for the statutorily mandated period. Any convenience copies of these records located in other University offices should be properly secured while held and properly destroyed when they no longer serve a legal, operational, or historic value.

Binghamton Foundation

The Binghamton University Foundation has a Document Retention and Destruction Policy for all documents held by the Foundation. Please refer all questions to the Binghamton University Foundation Accounting Services Office.

Business Office

The Business Office is the official record custodian for records related to purchases and payments made with State appropriated funds.

Records include, but are not limited to:

- Agency Let Contracts* (including Bid and Contract Files)
- Cancelled Bid Files
- Certified Payrolls
- Non-Agency Let Contracts (including Vendor and Purchase Order (PO) Files)
- PCard (Procurement Card transactions)
- Request and Authorization for Travel
- Travel Advances
- Travel Card requisitions
- Vouchers (Travel, Account Payable, Special Charge)

*Not related to construction

Departments holding convenience copies should dispose of records 3 years from time payment is issued.

For more information contact Matthew Schofield.

Financial Aid

Financial Aid is the custodian for all records regarding Federal Student Financial Aid for undergraduate and graduate students.

For more information contact Patti Donahue.

Student Accounts

Student Accounts is the custodian for all records regarding account information for undergraduate and graduate students.

Records include, but are not limited to:

- Account receipts
- Banking documentation
- IFR receipts and refunds
- Insurance waivers (Medical)
- Loan documentation: Perkins Loans, Loan draw downs, Alternative loans
- NYS Attorney General and Mercantile Adjustment Bureau documents for collection
- Residency
- Scholarships
- TAP
- Tuition appeals

For more information contact Brent Ochiai.