# Sample Office ULCS Reference Sheet

***Instructions****: Use this form to keep track of your office’s information assets and their management requirements, so you have quick access to the information when you need it. This is particularly handy when you are conducting a purge day. Edit and change as needed to suit your needs.*

Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position/Office (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Updated by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date Last Updated: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| **File Name** | **ULCS Code** | **Retention Period** | **Final Disposition** | **Primary Format** | **Master/ Copy** | **Storage Location** | **Notes** |
| E.g. Procedure Manual | 540-00 | TR: S/O | AS | Electronic | M | \\uldept\records\Departmental shared\Policies Procedures\_540-00\Procedures |  |
| E.g. Supplies Orders | T (405-10) | C+5 | D | Paper | C | Filing cabinet (L1006A) | Transitory. Retain delivery slips for 5 years (warranty; budgeting); then shred |
| E.g. Course Evaluations | NR | C+5 | Shred | Electronic | C | \\uldept\department\... | Shred individual evaluations as soon as summarizedRetain summary evaluations for five years; then shred |
| E.g. Office Equipment Documentation | 310-15 | T/E+7 | D | Paper | M | Filing cabinet (L1006A) | Create separate file for each item.Transfer to Records Centre after 2 years.  |
| What are the files called in your office?Note the complete ULCS code, or T (for transitory), or NR for non-record |  | Per the ULCS for records. If transitory or non-record, note what decision your department has made. | Per the ULCS for records, or Shred/Recycle for transitory and non-records |  |  | Note any additional information for the management of the information (how to file, access restrictions, transferring to records, etc.)  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |