

|                                       | Doc Type                                   | Keyword Name                   | Optional Keyword Dropdown List  | Document Examples (not limited to)  | Retention        |
|---------------------------------------|--|--------------------------------|---|---|------------------|
| <b>Personnel File (public record)</b> | HR PF Appointment and Salary Documentation | HR Appointment and Salary Type | AMCP Letter<br>Equity Letter<br>CWA Contract Increases<br>Other salary/appointment memo<br>FTE<br>Hire Checklist<br>HR PAR<br>Reclassification Letter<br>Reemployment of Retired Faculty and Staff<br>FLSA Transition Notifications |   | Active + 6       |
|                                       | HR PF Disaster                             |                                |   |   | Until Superseded |
|                                       | HR PF Discipline                           | HR Discipline Type             | Admin Leave<br>DCC<br>Development Plan<br>Final Warning<br>Letter Of Counsel/Coaching<br>PIP<br>Suspension<br>Written Notice (First)  | Documented Constructive Counseling<br>First Written Notice<br>Performance Improvement Plans<br>Warning Letters<br>Coaching letters<br>Paid Administrative Leave<br>Suspension Notifications | Active + 6       |
|                                       | HR PF File Requests                        |                                |   | Request to examine personnel file   | 3 years          |
|                                       | HR PF Job Application Materials            | HR Job Application Type        | Application<br>Cover Letter<br>Letter of recommendation<br>Resume<br>Position Referral Request<br>Promotion/Transfer Request  | Interview Notes (if hired)  | Active + 6       |
|                                       | HR PF Medical Certifications               |                                |   | Chemical and bloodborne pathology safety certificate  | Active + 6       |

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| <b>Personnel File (public record)</b> | HR PF Minor Documentation     |                     |   | Minor's policy<br>Standards of Behavior (CCC)<br>Standards of Behavior (non-CCC)               | 3 years    |
|                                       | HR PF Offer Letter (Signed)   | Personnel Type      | Faculty<br>GA<br>Staff<br>Student   |  | Active + 6 |
|                                       | HR PF Performance Management  | HR Performance Type | 360 Review<br>Letters, Complaint<br>Letters, Congratulatory<br>Midyear Review<br>Probationary Review (CCS)<br>Self-Assessment<br>Yearend Review   |  | 5 years    |
|                                       | HR PF Policy Acknowledgements | HR Policy Type      | Alternative Arrangement Agreement To Comply With Nepotism Policy<br>Code of Responsibility For Security And Confidentiality Of Student Information<br>Ethics Acknowledgement<br>Fraud Acknowledgement<br>Grad Payroll Form<br>Nepotism Disclosure<br>Policy Acknowledgement | Uniform Policy, Signed<br><br>Paid External Consulting Form<br><br>Conflict of Interest Policy | Active + 6 |

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| <b>Personnel File (public record)</b> | HR PF Position Description (Signed) |              |                                |  | Active + 6 |
|                                       | HR PF Professional Certifications   |              |                                | Awards, certifications, achievements, trainings<br>Education records (any records other than directory information)<br>Test Results (non-medical)  | Active + 6 |
|                                       | HR PF Separation Documentation      |              |                                | RIF<br>Termination letter<br>Transfer documentation<br>Resignation Letter  | Active + 6 |
|                                       | HR PF Work Agreements               |              |                                | Flexible Work Arrangement Agreement<br>Request for Course Enrollment During Regularly Scheduled Work Hours<br>Staff External Work Approval Request | 5 years    |

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|------------------------------|---------------------------|---------------------|---|--|------------|
| Payroll Processing Documents | HR PR Additional Pay      | HR Add Pay Type     | Awards<br>Cell Phone/Internet<br>ODP<br>Supplemental Compensation   |  | Active + 6 |
|                              | HR PR Forms               |                     |   | Sick Leave Conversion Enrollment Form<br>Student Life Meal Enrollment Form<br>Vacation Donation Form       | Active + 6 |
|                              | HR PR Timekeeping         |                     |   | Jury Duty Letter<br>Sick Leave Conversion letters<br>Convert overtime to comp time form<br>com time payout | 1 year     |
| Controlled Access documents  | HR CA Hire Data Worksheet |                     |   |  | 30 days    |
|                              | HR CA I-9                 |                     |   |  | Active + 3 |
|                              | HR CA Immigration         | HR Immigration Type | F1<br>H1B Actual Wage Worksheet<br>H1B Approved eRequest<br><br>H1B Approved eRequest - Premium Processing<br>H1B Department Agreement Form<br>H1B Export Control Form<br>Invitation Letter<br>J1 Departure Form<br>J1 DS-2019<br>J1 English Verification Form<br>J1 Letter of Support<br>J1 Salary Report<br>J1 Shipping Packet<br>OPT (Option Practical Training)<br>Signed Invitation Letter<br>Signed Letter of Support<br>TN | H1B Petition<br><br>Approval Notice  | Active + 3 |
|                              | HR CA Vol Self ID         |                     | Disability<br>EEO   |  | 3 years    |