CSR 40

CONFERENCE AND SHORT-STAY SERVICES

RECORDS CLASSIFICATION PLAN AND RETENTION SCHEDULE

URIMC Approved:
May 7, 2018
URIMC Revised:
N/A
RIM Edits (consistency, typographical, updates, etc.):
June 10, 2019

Contact the Records and Information Management Program (Archives and Special Collections, University Library) for more information: https://www.uregina.ca/library/rim/
CSR 40 User Information

Abbreviations & Definitions
- CSR – Campus and Community Services and Resources
- EMS – EMS is a system that manages client contacts.
- OPR – Office of Primary Responsibility. Contact your area’s Designated Records Officer for details on OPRs listed as “Various.”
- RIM – Records and Information Management
- SO – Superseded (updated or replaced by the appropriate position or body) or Obsolete (declared no longer relevant by the appropriate position or body). Definition of SO for each series is maintained by your area’s Designated Records Officer.
- URIMC – University Records and Information Management Committee

End of Year
- Unless otherwise noted, the default “year” is the fiscal year which commences on May 1 and ends on April 30. Retention timeframes will commence in the year following completion/date of last action that activates the retention period.
- All records are subject to archival appraisal once their stated retention period has been met.
- Contact your area’s Designated Records Officer before initiating disposition.

Managing Other Copies
- In instances in which more than one copy of a record exists, the Designated Records Officer for the responsible unit will identify one as the official record. All other copies of that record are to be destroyed as soon as the purpose for which the copy was created has been fulfilled. No other copy may be retained for a period exceeding the official record retention period. All copies (official and other copies) are subject to requests under The Local Authority Freedom of Information and Protection of Privacy Act and therefore put the University at risk if not managed appropriately.
CSR 40 CONFERENCE AND SHORT-STAY SERVICES

The functional grouping that relates to hotel-type accommodation at the University and to requirements relating to conferences and other events.

100  Non-Academic (Conference) Booking

200  Short-Stay (Hotel) Accommodation Booking

300  Marketing and Promotion
**CSR 40 CONFERENCE AND SHORT-STAY SERVICES**

**FUNCTION 100 – NON-ACADEMIC (CONFERENCE) BOOKING**

The function documenting the allocation of space for non-academic events.

<table>
<thead>
<tr>
<th>Series Code</th>
<th>Series Description</th>
<th>OPR &amp; Official Record Location</th>
<th>Specialized Electronic System</th>
<th>OPR Minimum Retention Period</th>
<th>Archival Instructions for OPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSR40-101</td>
<td><strong>Client Case Files</strong></td>
<td>Student Affairs</td>
<td>EMS</td>
<td>3 years</td>
<td><strong>Send list of records that have met retention requirements to Archives.</strong> The Archives will appraise the records. They will reply with an indication of which records are to be transferred to Archives and which records are to be destroyed, as well as the process to be followed in each case.</td>
</tr>
<tr>
<td>(Old #: CSR40-100-10)</td>
<td>Includes booking requests, bids, proposals, offers, confirmations, contracts, special needs, contact information, cancellations and space allocation.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CSR40-102</td>
<td><strong>Internal Collaboration</strong></td>
<td>Student Affairs</td>
<td></td>
<td>1 year</td>
<td><strong>Send list of records that have met retention requirements to Archives.</strong> The Archives will appraise the records. They will reply with an indication of which records are to be transferred to Archives and which records are to be destroyed, as well as the process to be followed in each case.</td>
</tr>
<tr>
<td>(Old #: CSR40-100-20)</td>
<td>Documentation regarding co-ordination with other University units such as food services, technology requirements and parking.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# CSR 40 CONFERENCE AND SHORT-STAY SERVICES

## FUNCTION 200 – SHORT-STAY (HOTEL) ACCOMMODATION BOOKING

The function that documents hotel-type accommodation requests.

<table>
<thead>
<tr>
<th>Series Code</th>
<th>Series Description</th>
<th>OPR &amp; Official Record Location</th>
<th>Specialized Electronic System</th>
<th>OPR Minimum Retention Period</th>
<th>Archival Instructions for OPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSR40-201</td>
<td>Client Case Files</td>
<td>Student Affairs</td>
<td>STAR RES</td>
<td>3 years</td>
<td>Send list of records that have met retention requirements to Archives. The response will authorize the destruction of the records and request a copy of the ‘Confirmation of Secure Destruction’ form.</td>
</tr>
<tr>
<td>(Old #: CSR40-200-10)</td>
<td>Includes applications, offers, confirmations, special needs, contact information and cancellations. Clients may be individuals or groups.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>CSR40-202</td>
<td>Internal Collaboration</td>
<td>Student Affairs</td>
<td></td>
<td>1 year</td>
<td>Send list of records that have met retention requirements to Archives. The Archives will appraise the records. They will reply with an indication of which records are to be transferred to Archives and which records are to be destroyed, as well as the process to be followed in each case.</td>
</tr>
<tr>
<td>(Old #: CSR40-200-20)</td>
<td>Documentation regarding co-ordination with other University units such as food services, technology requirements and parking.</td>
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<td></td>
<td></td>
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</tr>
</tbody>
</table>
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FUNCTION 300 – MARKETING AND PROMOTION

The function of developing events and materials to assist in increasing awareness of event space and short-stay accommodation.

<table>
<thead>
<tr>
<th>Series Code</th>
<th>Series Description</th>
<th>OPR &amp; Official Record Location</th>
<th>Specialized Electronic System</th>
<th>OPR Minimum Retention Period</th>
<th>Archival Instructions for OPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>CSR40-301</td>
<td>Case Files</td>
<td>Student Affairs</td>
<td>Specialized Electronic System</td>
<td>SO + 2 years</td>
<td>Send list of records that have met retention requirements to Archives. The Archives will appraise the records. They will reply with an indication of which records are to be transferred to Archives and which records are to be destroyed, as well as the process to be followed in each case.</td>
</tr>
<tr>
<td>(Old #: CSR40-300-10)</td>
<td>Records relating to advertising, brochure development, etc.</td>
<td></td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>