



FM3200: Financial Management – Budget		
University of British Columbia RECORDS SCHEDULE		Schedule Number: FM3200
Primary Title: Budget		Office of Primary Responsibility (OPR): UBCV: Financial Operations; All units UBCO: Finance Operations and Strategies; All units
<p>Records include official version of approved budgets, budget plans, investment plans, global statements of expenditures at fiscal year-end and detailed budget statements and other records that go into preparing the official budget. This primary also includes unit-level budget forecasting records such as budget planning, periodical budget forecasts, reports, and supporting documentation.</p> <p>Note: Once records are approved in Workday the record holder should securely destroy the referent records.</p>		
Vital: Yes		PIB: No
Authority: Budget Transparency and Accountability Act [SBC 2000] Chapter 23 Records Management Office Digitization Standard		Date Approved: 20220729
Secondary No.	Secondary Title	Retention, Destruction & Disposition
01	Policies and Procedures	EV+5Y, FR EV=Date superseded or obsolete FR=UA will fully retain records from this series
05	General	EV+5Y, D EV=Date superseded or obsolete
15	Budget Forecasts (Units)	FY+2Y, D
45	Issues	FY+5Y, D
60	Financial Statements and Reports	FY+7Y, SR SR=UA will selectively retain records from this series



65	Official Budget (Annual Budget Report)	FY+7Y, D Destruction rationale: Official Budgets for the university are approved through the Board of Governors official proceeding and will be fully retained as part of that approval process; therefore, these records can be destroyed at end of retention period
Acronym Key. AY = Academic Year; CY=Calendar Year; D=Destroy; EV=Event; FY=Fiscal Year; FR=Full Retention by University Archives unless otherwise noted; OPR=Office or Department responsible for <i>source of truth</i> records; SO=When superseded or obsolete; SR=Selective Retention by University Archives; UA=University Archives; Y=Year		