



FM3400: Financial Management – Travel Services		
University of British Columbia RECORDS SCHEDULE		Schedule Number: FM3400
Primary Title: Travel Services		Office of Primary Responsibility (OPR): UBCV: Financial Operations ; UBC Student Safety Abroad
<p>Records in this series are all records resulting from planning and booking University-related travel using UBC Travel and UBC’s Travel Management Company. Record types include correspondence, forms, receipts, and itineraries.</p> <p>Personal information is contained in Concur profiles, including credit card information.</p> <p>Note: Once records are approved in Workday the record holder should securely destroy the referent records.</p> <ul style="list-style-type: none"> • For payments and refunds, or any records regarding UBC Visa Credit Card, see FM3000: Financial Management - Accounting • For travel insurance, see ER2500: Enterprise Risk and Security - Risk Management Services - General • For events and conferences, see CE2000: Ceremonies, Conferences, and Events 		
Vital: Yes		PIB: Yes (Safety Abroad Registry)
Authority: BoG Policy FM8: Travel and Related Expenses Records Management Office Digitization Standard		Date Approved: 20220729
Secondary No.	Secondary Title	Retention, Destruction & Disposition
01	Policies and Procedures Includes discounts, meals per diem.	EV+5Y, FR EV=Date superseded or obsolete FR=UA will fully retain records from this series
05	General Includes online resources and tools.	EV+5Y, D EV=Date superseded or obsolete
10	Planning and Booking Includes booking, itineraries and correspondence created through self-service portal Concur, working with	CY+7Y, D



	agents or through Direct Travel, Triplt mobile services.	
15	Safety Abroad Registry All profiles created online using CWL for students studying abroad.	CY+6Y, D
18	Travel Advisories	CY+3Y, D
45	Issues Pertains to issues arising from air, car, and hotel suppliers. Support and problem resolution.	CY+5Y, D
60	Reports	CY+5Y, D
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 records; SO=When superseded or obsolete; SR=Selective Retention by University Archives; UA=University Archives; Y=Year		