

Retention and disposal schedule

Documents associated with procurement

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Scope, organisation and application

The documents listed below are to be disposed of on the basis of the Swedish National Archives Regulations and General Advice on disposal and return of documents associated with procurement (RA-FS 2004:2, amended 2005:1)

The retention and disposal schedule covers Uppsala University in its entirety. In the case of joint property units in which Uppsala University is a party, this schedule can be used provided that a decision to that effect is taken by the joint property unit concerned.

The retention and disposal schedule is medium-independent. A document may be drawn up on paper, but it may equally well have been produced by automatic data processing. It is the value of the information that determines whether a document is to be retained or disposed of. Note that this includes documents received as email.

Unless specifically stated otherwise, the documents listed in the retention and disposal schedule refer to the original document or the University's copy of a document that has been dispatched. In the case of documents extracted from automatic data processing systems that exist in multiple copies, the instructions in the schedule refer to the copy that the University has decided will be the master. Other copies of such documents are to be regarded as copies/duplicates.

The schedule does not cover working material, e.g. rough copies, estimates and other material that does not have to be archived and made an official document. These documents should always be discarded when they are no longer current.

Documents to be retained

- Documents underlying purchases, e.g. acquisition decisions, investment decisions and purchase requests.
- Advertisements inviting applications to be invited to tender, invitations to tender, invitations to participate in a design contest or other invitations to submit an expression of interest.
- Tender documents and information material for applications to tender or the equivalent.
- From tenders or equivalent applications that have been accepted: tenders, applications to tender, contest entries, confirmation of participation within a qualification system and equivalent documents, and clarifications and supplementary information requested. Attachments consisting of objects, e.g. samples and models, may be disposed of or returned to the tenderer provided that they are described or visually reproduced in documentation that is retained.
- Record of opening of tenders, list of tenders and equivalent documents.
- Documentation of negotiation, sampling, tests, oral presentation and checking of references.
- Summary of qualification of tenderers and evaluation of tenders.
- Documents relating to decisions, reasons for decisions regarding procurement or decisions to discontinue a procurement. This includes award decisions.
- Procurement contracts, including attachments.
- Orders or equivalent documents in the case of call-offs under a framework agreement, in cases where the value of the goods/services ordered exceeds SEK 25,000 excluding VAT.

- Documents in connection with direct procurement, in cases where the value of the goods/services procured exceeds SEK 25,000 excluding VAT (see Guidelines for Procurement at Uppsala University)

Disposable documents

- Address lists
- Unsuccessful tenders
- Insurance certificates

Retention period

Documents may not be disposed of or returned until

- the limitation period for seeking damages has expired,
- they are no longer needed for accounting, control or audit purposes, and
- they are no longer needed to prove claims or other rights and obligations.

However, documents may not be disposed of until at least two years have elapsed since the procurement concluded.