

06 – Retained Documents

- Provides a means of managing the records and documents that are part of the quality system, including keeping track of the retention times, persons responsible for the records, name of the records, and the related QMS procedures

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01 - Administrative Departments

▶	Department No:	<input type="text" value="0010"/>	
	Department Name:	<input type="text" value="Administration"/>	
	Department No:	<input type="text" value="0020"/>	
	Department Name:	<input type="text" value="Human Resources"/>	
	Department No:	<input type="text" value="0030"/>	The different departments are responsible for maintaining and managing their own documents.
	Department Name:	<input type="text" value="Information Technology"/>	
	Department No:	<input type="text" value="0040"/>	
	Department Name:	<input type="text" value="Sales and Marketing"/>	
	Department No:	<input type="text" value="0050"/>	
	Department Name:	<input type="text" value="Engineering"/>	
	Department No:	<input type="text" value="0060"/>	
	Department Name:	<input type="text" value="Purchasing"/>	
	Department No:	<input type="text" value="0070"/>	
	Department Name:	<input type="text" value="Finance"/>	
	Department No:	<input type="text" value="0080"/>	
	Department Name:	<input type="text" value="Production"/>	
*	Department No:	<input type="text"/>	
	Department Name:	<input type="text"/>	

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02 - Retained Documents

Dept No.

Dept Name

Administration

Retention Time	Form No	Retained Docuemnt	QMS No.	QMS Procedure	Location	Responsibility
6 mos.	02-021	Change Request	02-020	Document Control	ISO Rep - Office	ISO Representative
5 yrs.		Management Review Meeting Minutes	02-030	Management Review Meetings	ISO Rep - Office	ISO Representative
5 yrs.		Employee Questionnaire Survey Results	03-060	Employee Questionnaire	President - Office	President
3 yrs.		S&OP Meeting Minutes	06-040	Sales and Operations Meeting	President Office	President
3 yrs.		Business Review Meeting Minutes	06-050	Business Review Meeting	President Office	President
5 yrs.	15-016	Audit Report	15-010	Internal Quality Audits	Audit Files - ISO Rep.	ISO Representative
5 yrs.	15-015	Audit Checklist	15-010	Internal Quality Audits	Audit Files - ISO Rep.	ISO Representative
5 yrs.	15-022	C&PA Report	15-020	Corrective and Preventive Action	C&PA Files - ISO Rep	ISO Representative
5 yrs.	15-021	C&PA Requests	15-020	Corrective and Preventive Action	C&PA Files - ISO Rep	ISO Representative
Current		Executive Project Plans	15-040	Executive Projects	President Office	President
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Record: [Navigation Icons] 1 of 10

Record: [Navigation Icons] 1 of 8

01 - Summary of Retained Documents

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0040 Sales and Marketing

Retention Time	Form No.	Retained Document	Location	Procedure No.	QMS Proc
12 yrs.		ECR Customer Approval	Sales Order Folders	05-010	Engineering Ch
12 yrs.	06-031	Order Exception Requests	Sales Order Folders	06-030	Order Exception
12 yrs.	07-021	Order Specification Form	Sales Order Folders	07-020	Step 1. Develop
12 yrs.	07-022	Order Worksheet	Sales Order Folders	07-020	Step 1. Develop
12 yrs.		Order Communication: Non-Technical	Sales Order Folders	07-020	Step 1. Develop
12 yrs.		Order Communication: Technical	Sales Order Folders	07-020	Step 1. Develop
12 yrs.		Satutory and regulatory information	Sales Order Folders	07-020	Step 1. Develop
12 yrs.		Order Acknowledgement	Sales Order Folder	07-060	Contract Review
12 yrs.		Contract Review Approvals	Sales Order Folder	07-060	Contract Review
1 yr.	07-061	Contract Approval Form	Sales Office	07-060	Contract Review
1 yr.	08-021	Split Order Authorization Form	Sales Order Folders	08-020	Splitting Orders
1 yr.	08-031	Temporary Hold Notice	Sales Order Folders	08-030	Temporary Hold
3 yrs.	08-041	Administrative Admendment Form	Sales Office	08-040	Administrative C
3 yrs.	08-041	Administrative Admendment Form	Sales Office	08-050	Correction to Li
10 yrs.	11-021	Completed Customer Surveys	Customer Folder	11-020	Customer Surv
12 yrs.		Warranty Claim Evidence	Sales Order Folder	11-030	Warranty claim:
12 yrs.	13-042	Consignment Goods Report	Sales Order Folder	13-040	Consignment G
3 yrs.		Product Development Meeting Minutes	VP Sales - Office	14-010	Product Develo
12 yrs.	16-031	Cost Recovery Summary	Sales Order Folders	16-030	Account Manag

02 - Summary of Retained Documents

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Retention Time	Form No.	Retained Document	Location	Procedure No.	QMS Proc
0010 Administration					
5 yrs.	15-022	C&PA Report	C&PA Files - ISO Rep	15-020	Corrective and I
3 yrs		S&OP Meeting Minutes	President Office	06-040	Sales and Oper
5 yrs.	15-015	Audit Checklist	Audit Files - ISO Rep.	15-010	Internal Quality
3 yrs.		Business Review Meeting Minutes	President Office	06-050	Business Revi
5 yrs.	15-021	C&PA Requests	C&PA Files - ISO Rep	15-020	Corrective and I
Current		Executive Project Plans	President Office	15-040	Executive Proje
5 yrs		Employee Questionnaire Survey Results	President - Office	03-060	Employee Ques
5 yrs.		Management Review Meeting Minutes	ISO Rep - Office	02-030	Management R
5 yrs.	15-016	Audit Report	Audit Files - ISO Rep.	15-010	Internal Quality
6 mos.	02-021	Change Request	ISO Rep - Office	02-020	Document Cont
0020 Human Resources					
Indefinite	03-072	Concept Training Record	Employee Files - HR Office	03-040	ISO9000 Conci
Indefinite		Choices Sign-off Sheets	Employee Files - HR Office	03-020	Ethics
Indefinite	03-091	Accident Investigation Reports	Employee Files - HR Office	03-090	Accident Invest
Indefinite	03-031	Proof of Orientation	Employee Files - HR Office	03-030	Hiring and New
Indefinite		Personal Information Employee Files	Employee Files - HR Office	03-080	Employee Rec
Indefinite	03-072	Group Meeting Attendance Records	Training Records - HR Offic	03-070	Training
Indefinite	03-071	Training Approval Records	Employee Files - HR Office	03-070	Training
Indefinite		Proof of Competency Records	Employee Files - HR Office	03-030	Hiring and New
Indefinite		Employee Performance Reviews	Employee Files - HR Office	03-050	Performance M
0030 Information Technology					
Current Only		Inventory of System Software	IT Office	04-030	Communication