It is not possible to make this diagram disability accessible at this time. Therefore if you are unable to use this diagram, please contact the RM Mailbox for advice.

Weeding Flow Diagram – Finance Documents
(based on University Retention Schedule v7.0, 2019)

START

Document relates to income

Document relates to expenditure

Document relates to internal recharging

Document is a delivery note or goods received note

Relates to REF or EU funding expenditure?

YES

End of project + 10yrs
OR
Final payment + 10yrs (whichever is the longer)

NO

Date of creation + 10yrs

Consult full UoP Retention Schedule (section 5) for guidance

Other type of document

Optional: End of financial year + 1yr

End of financial year + 1yr

End of financial year + 6yrs

Other income related documents

There should be no need to retain other income related documents locally.

Optional: End of financial year + 1yr

Date of creation + 6yrs

Till roll

Sales invoice requisition

End of financial year + 1yr

Document is a delivery note or goods received note

NO

NO

NO

NO

NO

NO

NO

NO

NO

NO

NO

END

Please Note: This document is aimed at local departments only. The central Finance Professional Service area should refer to the full UoP Retention Schedule.