

# Wright State University RECORDS RETENTION SCHEDULE (RRS)

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**Instructions:** This form establishes a schedule of retention and disposal for the listed records series, based on procedures provided by Section 149.333 of the Ohio Revised Code. Offices are required to submit a [Certificate of Records Disposal \(CRD\)](#) to the University Records Manager prior to the disposal of records listed on their retention schedule, as per [Wright State Policy 12220](#). This schedule shall become effective on the last date approved. Obtain approvals and return to the University Records Manager, Special Collections and Archives, 401 Dunbar Library. For assistance, please call ext. 2017, or write to [chris.wydman@wright.edu](mailto:chris.wydman@wright.edu).

**Originating Office/Department Code:** **Facilities Management and Campus Operations- Design and Construction**

**PLEN/  
FPMG**

**Division:** **Division of Executive Vice President/  
Chief Operating Officer**

<sup>1</sup>**Medium code:** P=Paper, M=Microfilm/Fiche, E=Machine Readable

<sup>2</sup>**Value code:** C=Confidential, H= Historical, R=Restricted, V=Vital

<sup>3</sup>**Description:** A separate retention period is required for each medium in the same records series.

WSU Records Series Number	Medium Code <sup>1</sup>	Value Code <sup>2</sup>	Records Series Title and Description <sup>5</sup>	IUC Number	Retention Period
PLEN09-01	P	V/H	<b><u>Architectural Drawings</u></b> Original building drawings and as-built drawings for all buildings, building infrastructure and campus site plans.	ADM2035 IUC-POM-00-01	Retain indefinitely.* Deposit/storage of originals in the University Archives is highly recommended.
PLEN09-02	E	V/H	<b><u>Architectural Drawings</u></b> Construction drawings as shown in 01 above in electronic format.	ADM2035 IUC-POM-00-01	Retain indefinitely.* Ensure regular back-ups and upgrades.
PLEN09-03	P	V	<b><u>Construction/Renovation Projects- Capital Property- Accounting Records- State of Ohio</u></b> a) Monthly Banner report (WSU Accounting System) b) OAKS report (State Accounting System)	ACC2000	Retain while active plus six years and then delete.

**\*Note:** Longer term storage may include, but not be restricted to, archives, an institutional records storage center, and conversion to microfilm or other acceptable mass storage media (per Sec. 9.01 of the Ohio Revised Code).

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PLEN09-04	P	V/H	<b><u>Construction Projects-Capital Property-Administrative Records</u></b>  a) Program, surveys, permits, specifications, submittals, shop drawings, manager notes, close out documents, budget/funding records.  b) Design development/review, ADA standards, architect selection/contract/correspondence, testing, inspections, general/DAS/EEO correspondence, bidding procedures, advertising, bid tabulation, construction contracts, project meeting minutes, contractor correspondence, furniture/fixture/equipment list, change orders, Ohio Arts Council, commissioning and final report.	ADM2030  IUC-POM-00-04	Retain <b>a</b> for life of building.  Retain <b>b</b> while active plus 26 years and then destroy.
FPMG16-06			<b><u>Construction Projects-Capital Property-Administrative Records- RFQs</u></b>	ADM2030  IUC-POM-00-04	Retin for life of building. Once files inactive, transfer to archives for long term storage.
PLEN09-05	P	V	<b><u>Construction Project-Capital Property-Accounting Records</u></b> Architects/contractors payments, value engineering, cost estimates/analysis, schedules, requests for information, equipment contracts, signage, fit up, bulletins, purchase orders and claims.	ACC2000  IUC-ACC-20-01	Retain while active plus six years and then destroy.

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PLEN09-06	P	V	<p><b><u>Construction/Renovation Projects-Capital Property-Locally Funded-Accounting Records</u></b></p> <p>a) Minor construction-216XXX account records (for projects less than \$100,000).</p> <p>b) Major construction-882XXX account records (for projects \$100,000 and greater).</p> <p>c) Monthly project account reports.</p> <p>d) Department budget account 215100 records.</p> <p>e) Department design account 215103 records.</p>	ACC2000  IUC-ACC-20-01	<p>Retain <b>a, b, and c</b> while active plus six years and then then destroy.</p> <p>Retain <b>d and e</b> for two years and then destroy.</p>
PLEN09-07	P	H/V	<p><b><u>Construction Projects-Capital Property-Master Plan-Administrative Records</u></b></p> <p>a) Master plans for long range planning and development of the exterior/physical aspects of the campus.</p> <p>b) Capital plans describe state and locally funded construction projects anticipated over the next six years.</p> <p>c) Project planning folders.</p>	ADM2030  IUC-POM-00-04	<p>Retain <b>a and b</b> in the office indefinitely.* A security microfilm or paper hard copy stored in the University Archives is highly recommended.</p> <p>Retain <b>c</b> in the office for ten years and then review for continuing administrative value.</p>
PLEN09-08	P	V	<p><b><u>Environmental-Hazardous Substances Records- Asbestos Abatement</u></b></p>	ENV2000  29 CFR 1910	Retain for 30 years and then destroy.

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FPMG10-01	P	C	<p><b><u>Personnel Files-Department</u></b>            Staff personnel files. Files can contain position descriptions, applications, letters of appointment or change, personnel data, notice of salary rate, annual contracts, performance evaluations, PERS forms, previous state service forms, reclassification notices, letters of commendation or reprimand, publications, evidence of continuing education, transfers, leave of absence requests, payroll forms, vacation and sick leave reports, resignations, termination notices.            Review for continuing administrative value.</p> <p><i>Note: Long-term information is held by Human Resources Office.</i></p>	PER3000 IUC-HR-40-21	Retain while active plus six years, then destroy. If subject to pending legal action, retain until final disposition.
FPMG10-03	P/E	C	<p><b><u>Personnel Files-Employee Selection</u></b>            Vitae, letters, and other records of individuals who have applied for staff positions but were not hired.</p>	PER2000 IUC-HR-40-04	Retain for three years, then destroy.
FPMG10-04	P/E	C	<p><b><u>Personnel Files- Recruitment Records</u></b>            Job postings, interview questions, interview notes, status of position offer form, and other documentation required by Affirmative Action</p>	PER2000 IUC-HR-40-04	Retain for three years, then destroy.
FPMG10-05	P	V/H	<p><b><u>Reports-Departmental</u></b>            1. Capital Improvement Plan (submitted to the State of Ohio)            2. Program of Requirements (detailed report for each construction project for internal and external use)            3.</p>	ADM9910 IUC-ADM-00-01	Retain in office indefinitely. Microfilm original documents bi-annually and store off-site.*
FPMG10-07	P/E	H	<p><b><u>Subject Files-Director's</u></b>            Correspondence, reports, minutes, memoranda, and information files documenting the activities of the Office of Planning &amp; Architecture.</p>	ADM9910 IUC-ADM-00-01	Retain for three years then review for continuing administrative or historical value. *

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