

# 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 Way Policy 2501](#). 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/ Dept. Code:** Facilities Management and Campus Operations- Facility Operations (Formerly Physical Plant) PHPL

**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
PHPL08-01	P		<b><u>Agreements/Contracts</u></b> Agreements (e.g. contracts with custodial services, contracted employees, etc.) stored in 129 Allyn Hall.	LEG2000 IUC-LEG-00-01	Retain while active plus five years. Then, review for continuing administrative or historical value. *
PHPL08-02	P	H	<b><u>Building Files</u></b> Files pertaining to university buildings. They include correspondence and equipment maintenance information.  <i>Note: Files maintained in a) 129 Allyn Hall (correspondence) and b) Physical Plant Customer Service Center 065 Allyn Hall and arranged by building name.</i>	ADM2030 IUC-POM-00-04	Retain for the life of the building plus three years. Then review for continuing administrative and historical value.*
PHPL08-03	P	H	<b><u>Committees-Departmental</u></b> Includes meetings' documentation from committees such as the Physical Plant Advisory Committee and other project-related task forces. Stored in 129 Allyn Hall.	ADM9910 IUC-ADM-00-01	Retain in office for three years and then transfer minutes and reports to the Archives.
PHPL08-16	P/E		<b><u>Custodial Services Recycling Records</u></b> Includes grant monies, items purchased, annual volumes of materials recycled and other records related to recycling services rendered.  Stored in 129 Allyn Hall.	LEG2000 IUC-LEG-00-01	Retain for three years then review for continuing administrative value.
PHPL12-17	P	V	<b><u>Custodial Services Equipment Manuals</u></b> Repair and parts documentation for equipment used and maintained by Custodial Services. Kept in 077 Allyn Hall, 020 Oelman Hall and 065 Student Union.	ADM9900 IUC-ADM-00-02	Retain for the life of the equipment plus one year.

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PHPL08-04	E	V	<b><u>Inspection/Maintenance Records-Equipment</u></b> Kept electronically via Computerized Management System (CMMS).	ADM2020  IUC-ADM-30-01	Retain a minimum of six years after inspection and then destroy.
PHPL08-20	P/E	V	<b><u>Inventory-Chemicals</u></b> This series includes copies of Material Safety Data Sheets (MSDS)-provide identification of chemicals and their usage-List updated continually.  <i>Note: The office of Environmental Health and Safety is the main repository for all MSDS information. MSDS information is also maintained electronically.</i>	ADM9910  IUC-ADM-00-01	Retain until superseded.
PHPL08-21	P/E	V	<b><u>Inventory-Chemical applications</u></b> Chemical applications-documents applications of chemicals such as pesticides on campus grounds.	ENV3000  49 CFR	Retain for five years and then destroy.
PHPL08-22	P/E		<b><u>Inventory-Equipment</u></b> Inventory of landscape and office equipment, equipment parts, signs, and vehicles used by Grounds Maintenance.	ADM9910  IUC-ADM-00-01	Retain for the life of the equipment.
PHPL08-23	P/E	H	<b><u>Inventory-Memorial Trees</u></b> Files on donors and locations of identified trees.	ADM9910  IUC-ADM-30-01	Maintain continually updated. Transfer inventory to the Archives every three years.
PHPL12-05	P/E	V	<b><u>Manuals-Emergency Response</u></b> Manual composed and updated by the Physical Plant department.  <i>Note: Paper and electronic copies in 065 Allyn Hall. Annually updated copies maintained in all departments/zone/WSU Police Department, Customer Service Center and Weekend workstation (065 Allyn Hall).</i>	ADM9900  IUC-ADM-00-02	Retain in office until superseded. Transfer one dated paper copy of each version to the Archives every three years.

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PHPL08-06	P	V	<p><b>Manuals-Equipment/Owner's</b>            Original manuals for chillers, boilers, ice machines, small air-conditioners, and kitchen equipment.</p> <p><i>Note: Files kept in 065 Allyn Hall.</i></p>	ADM9900 IUC-ADM-00-02	Retain for the life of the equipment plus one year.
PHPL12-07	E	V	<p><b>Manuals-Equipment/Owner's- Automated Building Controls</b>            This series includes the documentation on the automated building controls for the entire campus. This system controls HVAC, lighting, etc. Control drawings for every WSU building area maintained in 065 Allyn Hall along with the back -up disk (Colorado Backup) and revisions for software upgrades for automated building controls.</p> <p><i>Note: Files kept in 065 Allyn Hall.</i></p>	ADM9900 IUC-ADM-00-02	Retain for the life of the equipment plus one year.
PHPL08-08	E	V	<p><b>Permits/Warranties-Equipment</b>            This series includes original documentation on the following equipment:</p> <ul style="list-style-type: none"> <li>➤ Boilers</li> <li>➤ Chillers</li> <li>➤ Elevator (certificates) campus-wide</li> <li>➤ Fire Alarm systems</li> <li>➤ Fire extinguishers</li> <li>➤ Sprinkler systems</li> <li>➤ Smoke detectors</li> </ul> <p>Stored in 065 Allyn Hall.</p>	LEG5020 IUC-POM-20-01	Retain for the life of the equipment plus three years.
PHPL12-10	P/E	C	<p><b>Personnel Files-Department</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.

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PHPL12-11	P/E	C	<b>Personnel Files-Employee Selection</b> Includes vitae, letters, records of individuals who have applied for staff positions in the office of the General Counsel.	PER2000  IUC-HR-40-04	Retain for three years, then destroy.
PHPL12-13	P/E	H	<b>Projects- Chargeable Services- Department</b> Accounting records on projects which fall under the Physical Plant Chargeback Policy.  Stored in 129 Allyn Hall.	ACC1000  IUC-ACC-20-01	Retain in the office for four years after project completed <b>and</b> all billing issues settled then destroy.
PHPL08-14	P/E	H	<b>Projects-Special-Department</b> Includes projects such as Energy Conservation, Recycling initiatives, and office relocation and renovation projects. Stored in 129 Allyn Hall.	ADM9910  IUC-ADM-00-01	Retain in the office for three years. Review for continuing administrative or historical value.*
PHPL08-24	P	H	<b>Photographs</b> Photos (and their negatives) illustrating progress of grounds maintenance-related projects.	ADM9910  IUC-ADM-00-01	Retain in the office until the completion of the project plus three years. Then, transfer to the Archives.
PHPL08-25	P/E		<b>Property Management</b> Records related to the maintenance and repair of property and equipment.  <i>Note: All scheduled preventive maintenance files are kept in the CMMS system in Physical Plant.</i>	ADM2020  IUC-ADM-30-01	Retain while current plus six years, then destroy.
PHPL12-26	P/E		<b>Reports-Accidents</b> Documentation of accidents involving grounds maintenance-owned equipment and vehicles.  <i>Note: If no injury, documentation is held by the office of Grounds Maintenance. If injury, documentation forwarded to the office of Environmental Health and Safety. If there is damage to the vehicle, documentation forwarded to the WSU Police Department.</i>	ADM9910  IUC-ADM-00-01	If no injury, retain for five years and then destroy. If injury, transfer documentation to the offices of Environmental Health and Safety. If injury and worker's compensation claim filed, transfer to Office of General Counsel.

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PHPL08-27	P/E		<p><b><u>Reports-Monthly-Inspection</u></b>  Reports documenting status of grounds such as care of turf, trees, shrubs and beds.</p> <p><i>Note: Inspections are completed by the manager or supervisor in conjunction with the lead worker and the individual groundskeeper who maintains the area.</i></p>	ADM9910  IUC-ADM-00-01	Retain for five years, then destroy.
PHPL08-15	P/E	V	<p><b><u>Safety/Security of Buildings-Key Records</u></b></p> <p><i>Note: Original key records are kept at the Customer Service Center documenting every key issuance for on- and off-campus WSU buildings.</i></p> <p><i>Information is kept electronically. Hard copies are kept at the Customer Service Center, 065 Allyn Hall.</i></p>	ADM4000  IUC-IT-15-03	Retain in the office for three years and then review for continuing administrative value.
PHPL12-28	P/E		<p><b><u>Surveys- Customer Satisfaction</u></b></p>	ADM9900  IUC-ADM-00-02	Retain for the current year + 1 additional year.

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