

Wright State University

RECORDS RETENTION SCHEDULE (RRS)

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Addition	
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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.

Originating Office/Department Code: Financial Operations- Procurement and Contract Services PRCS

Division: Division of Executive Vice President/ Chief Operating Officer

- ¹**Medium code:** P=Paper, M=Microfilm/Fiche, E=Machine Readable
²**Value code:** C=Confidential, H=Historical, R=Restricted, V=Vital
³**Description:** A separate retention period is required for each medium in the same records series.

WSU Records Series Number	Medium Code ¹	Value Code ²	Records Series Title and Description ⁵	Retention Rule/ IUC Code	Retention Period
PRCS21-01	E/P	V	Agreements/Contracts Original agreements and amendments between WSU and other institutions and businesses. Records related to obligations under contracts, leases, and other agreements (i.e., Food Services agreements). Includes contracts for services, purchases and sales, transportation, leases, property and construction, exchange of property, etc. Includes government contracts (State of Ohio contracts accessible on-line) and records required to be kept until government audit.	LEG2000 IUC-LEG-00-01	Retain while active, plus five years. Review for continuing administrative or reference value*
PRCS21-02	E/P	V	Agreements/Maintenance- Office Equipment* Original agreements pertaining to equipment maintenance and equipment list. *Notes: a) These records are to be held by the Procurement Office when Procurement Office handles the purchase and there is a corresponding contract. b) Accounting Office holds original capital property records.	LEG2000 IUC-LEG-00-01	Retain while active, plus five years. Review for continuing administrative or reference value*

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

Wright State University
RECORDS RETENTION SCHEDULE (RRS)
 (continuation sheet)

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WSU Records Series Number	Medium Code ¹	Value Code ²	Records Series Title and Description ³	Retention Rule/ IUC Code	Retention Period
PRCS21-03	E/P		Commodity List List of current commodities used by product type. Periodically updated.	ADM9900 IUC-ADM-00-02	Retain until obsolete or superseded.
PRCS21-04	E/P		Quotations/Bids- Accepted (On-going and one-time) Records related to requests for bids for on-going contractual purchases for goods or services. These include RFPs, RFQs, and responses from vendors, resulting P.O.s and contracts where applicable. (These records are arranged numerically by fiscal year).	FIN8010 IUC-FIN-20-01	Retain while active plus five years.
PRCS21-06	E/P		Quotations/Bids- Rejected Records related to requests for unsuccessful bids for purchases of goods or services. These include RFPs, RFQs, and responses from vendors. (These records are arranged numerically by fiscal year).	FIN8000 IUC-FIN-20-02	Retain for current year plus three years.
PRCS21-07	P	V	Purchase Orders* Procurement Office's copy of order to a supplier authorizing purchase of goods. Includes 1) Blanket purchase orders for a) Services and b) Maintenance (arranged alphanumerically), and 2) Regular purchase orders (arranged numerically by fiscal year). <i>*Note: Copies of Purchase Orders are included in the individual Contract/Agreements files.</i>	FIN8010 IUC-FIN-20-03	Retain while active plus five fiscal years, then destroy.
PRCS21-08	E	V	Purchase Orders* Purchase order information held on the WrightBuy E-Procurement System and related tracking systems.	FIN8010 IUC-FIN-20-03	Retain while active plus five fiscal years, then destroy.
PRCS21-09	E/P		Requisition Requests by WSU offices Forms used to order goods and services.	ACC1000 IUC-ACC-00-09	Retain current fiscal year plus three years, then destroy.

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