

# Wright State University

## RECORDS RETENTION SCHEDULE (RRS)

|                 |        |
|-----------------|--------|
| <b>New</b>      |        |
| <b>Revision</b> | x      |
| <b>Addition</b> |        |
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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:** Payroll PYRL

**Division:** Human Resources

<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>   | Retention Rule/ IUC Code | Retention Period   |
|---------------------------|--------------------------|-------------------------|---|--------------------------|--|
| PYRL23-01                 | E                        | V                       | <b><u>Reports-Submitted to PERS/STRS (monthly/annual)</u></b>   | PER1040<br>IUC-HR-00-06  | Retain in the office for six years and then review for administrative value. |
| PYRL23-02                 | E                        |                         | <b><u>Reports-External</u></b><br>Examples include ING annuities and ARP voluntary investment.  | FIN3000<br>IUC-FIN-30-02 | Retain in the office for six years and then review for administrative value. |
| PYRL23-03                 | P/E                      |                         | <b><u>Account Reconciliation Records</u></b><br>Duplicate records for double-checking that information correctly remitted entered into Banner   | ACC3000<br>IUC-ACC-30-01 | Retain for four years and then destroy.                                      |
| PYRL23-04                 | P/E                      |                         | <b><u>Unclaimed Funds Records</u></b><br><ul style="list-style-type: none"> <li>➤ Uncashed checks (banks have checks)</li> <li>➤ Returned W-2</li> </ul>  | ACC1000<br>IUC-ACC-00-02 | Retain for four years and then destroy.                                      |
| PYRL23-05                 | E                        |                         | <b><u>Banner- HR/Payroll</u></b><br>This system was purchased in 2005 from SCT Sunguard, and implemented in January 2006. It is an integrated university-wide software system that manages all payroll and personnel reporting for the university. It is an Oracle based system and consists of over 50 online screens. Ad hoc reporting is done by the use of SQL or COGNOS. | FIN1000<br>IUC-ACC-40-01 | Retain continually updated.  |
| PYRL23-06                 | E                        |                         | <b><u>Direct Deposit Authorization Payroll form</u></b>   | FIN1000<br>IUC-FIN-10-01 | Scan through Xtender then maintain continually updated in system.            |

**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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|---------------------------|--------------------------|-------------------------|---|------------------------------|---|
| PYRL23-07                 | P/E                      |                         | <b><u>Salary Reallocation Documentation</u></b><br>Combination HR/Payroll form. History maintained in HRMS database. Record of university employee reclassification with accompanying job audit reviews, audit appeals, position description questionnaires, correspondence and final decision documentation. | PER3010<br><br>IUC-HR-40-36  | Retain while active plus five years.                              |
| PYRL23-08                 | P                        |                         | <b><u>Deduction Authorizations</u></b><br>Required (child support, IRS levy, garnishments)  | LEG5030<br><br>IUC-HR-40-41  | Retain for five years from last date of employment, then destroy. |
| PYRL23-09                 | P/E                      |                         | <b><u>Deductions-Involuntary-Tax Remittance Records</u></b><br>Includes forms, checks, and back-up documents on federal-, state-, local-, and school district-related taxes.  | PER1030<br><br>IUC-HR-50-05  | Retain for six years and then destroy.                            |
| PYRL23-10                 | P/E                      |                         | <b><u>W-2 Forms</u></b><br>Federal form reporting salaries, wages, and tips for each employee to the Internal Revenue Service.  | LEG5000<br><br>IUC-HR-50-03  | Retain for six years and then destroy.                            |
| PYRL23-11                 | P/E                      |                         | <b><u>W-4 Forms</u></b><br>Forms completed by employee showing federal tax withholding exemptions.  | PER1030<br><br>IUC-HR-50-04  | Retain for four years and then destroy. (IRS section 31.6001-2)   |
| PYRL23-12                 | E                        |                         | <b><u>Payroll Checks and Pay Statements</u></b><br>Record of payment to employees for services they perform. Includes documentation of staff, work-study student, and non-work-study students   | FIN1000<br><br>IUC-ACC-40-01 | Retain for four years and then destroy.                           |
| PYRL23-13                 | E                        |                         | <b><u>Time-keeping Documentation</u></b><br>Record of time worked by employees. Must list all necessary details.<br><br>Note: 29 CFR 516.5 (a)  | PER6000<br><br>IUC-HR-50-10  | Retain for five years and then destroy.                           |
| PYRL23-14                 | P/E                      |                         | <b><u>Student PERS/STRS Exemption Forms</u></b><br><i>Note: The office of Career Services maintains these forms during the academic year. Students don't pay into PERS. They do only if they work during the summer months.</i>   | PER3000<br><br>IUC-HR-40-25  | Retain indefinitely.  |

**Note:** The I-9 form (Immigration and Naturalization Employment Record) and the personnel action form (PAF) are maintained by Human Resources. Please refer to their office records retention schedule.

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