### 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.

### Originating Office/ Dept. Code:
**Facilities Management and Campus Operations**

### Approvals
- **Dean/Director/Head:**
- **Department Chairperson/Manager:**
- **University Records Manager:**
- **Head, Special Collections and Archives:**

### Medium code:
- P=Paper, M=Microfilm/Fiche, E=Machine Readable

### Value code:
- C=Confidential, H=Historical, R=Restricted, V=Vital

### Description:
A separate retention period is required for each medium in the same records series.

### WSU Records Series Number | Medium Code | Value Code | Records Series Title and Description | IUC Number | Retention Period
--- | --- | --- | --- | --- | ---
PHPL08-01 | P | | Agreements/Contracts | LEG2000 | Retain while active plus five years. Then, review for continuing administrative or historical value.*
PHPL08-02 | P | H | Building Files | ADM2030 | Retain for the life of the building plus three years. Then review for continuing administrative and historical value.*
PHPL08-03 | P | H | Committees-Departmental | ADM9910 | Retain in office for three years and then transfer minutes and reports to the Archives.
PHPL08-04 | E | V | Inspection/Maintenance Records-Equipment | ADM2020 | Retain a minimum of six years after inspection and then destroy.

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

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

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHYSICAL PLANT (continued)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| PHPL12-05 | P/E | V | Manuals-Emergency Response
Manual composed and updated by the Physical Plant department. **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). | ADM9900 | Retain in office until superseded. Transfer one dated paper copy of each version to the Archives every three years. |
| PHPL08-06 | P | V | Manuals-Equipment/Owner's
Original manuals for chillers, boilers, ice machines, small air-conditioners, and kitchen equipment. **Note:** Files kept in 065 Allyn Hall. | ADM9900 | Retain for the life of the equipment plus one year. |
| PHPL12-07 | E | V | Manuals-Equipment/Owner's- Automated Building Controls
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. **Note:** Files kept in 065 Allyn Hall. | ADM9900 | Retain for the life of the equipment plus one year. |
| PHPL08-08 | E | V | Permits/Warranties-Equipment
This series includes original documentation on the following equipment:
- Boilers
- Chillers
- Elevator (certificates) campus-wide
- Fire Alarm systems
- Fire extinguishers
- Sprinkler systems
- Smoke detectors
Stored in 065 Allyn Hall. | LEG5020 | Retain for the life of the equipment plus three years. |

**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).
**Wright State University**

**RECORDS RETENTION SCHEDULE (RRS)**

(continuation sheet)

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>PHPL12-09</strong></td>
<td>P/E</td>
<td></td>
<td>Payroll-Overtime Labor Reports-Departmental Overtime Rosters</td>
<td>ADM9910</td>
<td>Retain for calendar, 1/1 to 12/31 plus 40 calendar days (to resolve any grievances on overtime reporting discrepancies and then destroy). Maintenance Overtime Roster will be zeroed out annually on 1/1.</td>
</tr>
</tbody>
</table>

**PHPL08-10**

Payroll-Time Sheets-Department

*Note:* Departmental payroll records stored in 129 Allyn Hall (sign-in sheets, Web Time Card Change Requests, FMLA web time card copies, etc.)

PER3000 Retain for five years and then destroy.

**PHPL08-11**

Personnel Files-Department*

Staff personnel files, including student workers. These include performance evaluations, letters of recommendations, correspondence, resumes, copies of contracts, and vacation and sick leave information. Stored in 129 Allyn Hall.

*Note: Long-term information is held by Human Resources Office.*

PER3000 Destroy three years after date of separation. If subject to legal action, retain until final disposition.

**PHPL08-12**

Reports-Environmental

This series includes Water Treatment Plan EPA water quality reports, daily chlorine readings and sewage meter readings.

*Note: Originals stored in 065 Allyn Hall. Duplicate copies stored at the Water Treatment Plant.*

ENV1000 Retain for five years and then destroy.

---

**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).
### Records Series Title and Description

#### Projects - Chargeable Services - Department
Accounting records on projects which fall under the Physical Plant Chargeback Policy. Stored in 129 Allyn Hall.

**IUC Number**: ACC1000
**Retention Period**: Retain in the office for four years after project completed and all billing issues settled then destroy.

#### Projects - Special Department
Includes projects such as Energy Conservation, Recycling initiatives, and office relocation and renovation projects. Stored in 129 Allyn Hall.

**IUC Number**: ADM9910
**Retention Period**: Retain in the office for three years. Review for continuing administrative or historical value.*

#### Safety/Security of Buildings - Key Records
*Note: Original key records are kept at the Customer Service Center documenting every key issuance for on- and off-campus WSU buildings.

Information is kept electronically in two databases Schlage and Fox Pro. Hard copies are kept at the Customer Service Center, 065 Allyn Hall.

**IUC Number**: ADM4000
**Retention Period**: Retain in the office for three years and then review for continuing administrative value.

#### Subject Files - Director's
Includes correspondence, reports, minutes, memoranda, and informational files. Stored in 129 Allyn Hall.

**IUC Number**: ADM9910
**Retention Period**: Retain in the office for three years. Review for continuing administrative or historical value.*

---

**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).
## Wright State University
### RECORDS RETENTION SCHEDULE (RRS)
(continuation sheet)

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

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHPL08-17</td>
<td>P/E</td>
<td>V</td>
<td><strong>Agreements/Contracts</strong></td>
<td>LEG2000</td>
<td>Retain while active, plus five years. Then, review for continuing administrative or historical value. *</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Original agreements and amendments between WSU and other government agencies and businesses. Records related to obligations under contracts and other agreements. Includes contracts for services, purchases and sales. <strong>Example:</strong> Major building equipment replacement (see 08-08).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
|                           |             |            | **Notes:** a) These records are to be held by the Purchasing Office when Purchasing Office handles the purchase and there is a corresponding contract.  
b) Accounting Office holds original capital property records. |

*Note: Long 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).  
12/10/2018
**Wright State University**
**RECORDS RETENTION SCHEDULE (RRS)**
(Continuation sheet)

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code¹</th>
<th>Value Code²</th>
<th>Records Series Title and Description³</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHPL08-18</td>
<td>P/E</td>
<td></td>
<td>Custodial Services Recycling Records</td>
<td>LEG2000</td>
<td>Retain for three years then review for continuing administrative value.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Includes grant monies, items purchased, annual volumes of materials recycled and other records related to recycling services rendered. Stored in 129 Allyn Hall.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHPL12-19</td>
<td>P/ V</td>
<td></td>
<td>Custodial Services Equipment Manuals</td>
<td>ADM9900</td>
<td>Retain for the life of the equipment plus one year.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Repair and parts documentation for equipment used and maintained by Custodial Services. Kept in 077 Allyn Hall, 020 Oelma Hall and 065 Student Union.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**ENERGY AND PROCESS IMPROVEMENT OFFICE**

For retention of records in this office refer to the General Records Retention Schedule.

*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).*

12/10/2018
### PHYSICAL PLANT

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>PHPL08-20</td>
<td>P/E</td>
<td>V</td>
<td><strong>Inventory-Chemicals</strong></td>
<td>ADM9910</td>
<td>Retain until superseded.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>This series includes copies of Material Safety Data Sheets (MSDS)-provide identification of chemicals and their usage-List updated continually. <strong>Note:</strong> The office of Environmental Health and Safety is the main repository for all MSDS information. MSDS information is also maintained electronically.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHPL08-21</td>
<td>P/E</td>
<td>V</td>
<td><strong>Inventory-Chemical applications</strong></td>
<td>ENV3000</td>
<td>Retain for five years and then destroy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Chemical applications-documents applications of chemicals such as pesticides on campus grounds.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHPL08-22</td>
<td>P/E</td>
<td></td>
<td><strong>Inventory-Equipment</strong></td>
<td>ADM9910</td>
<td>Retain for the life of the equipment.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Inventory of landscape and office equipment, equipment parts, signs, and vehicles used by Grounds Maintenance.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHPL08-23</td>
<td>P/E</td>
<td>H</td>
<td><strong>Inventory-Memorial Trees</strong></td>
<td>ADM9910</td>
<td>Maintain continually updated. Transfer inventory to the Archives every three years.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Files on donors and locations of identified trees.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHPL08-24</td>
<td>P</td>
<td>H</td>
<td><strong>Photographs</strong></td>
<td>ADM9910</td>
<td>Retain in the office until the completion of the project plus three years. Then, transfer to the Archives.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Photos (and their negatives) illustrating progress of grounds maintenance-related projects.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>PHPL08-25</td>
<td>P/E</td>
<td></td>
<td><strong>Property Management</strong></td>
<td>ADM2020</td>
<td>Retain while current plus six years, then destroy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Records related to the maintenance and repair of property and equipment. <strong>Note:</strong> All scheduled preventive maintenance files are kept in the CMMS system in Physical Plant.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>WSU Records Series Number</td>
<td>Medium Code</td>
<td>Value Code</td>
<td>Records Series Title and Description</td>
<td>IUC Number</td>
<td>Retention Period</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-------------</td>
<td>------------</td>
<td>--------------------------------------</td>
<td>------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>PHPL12-26</td>
<td>P/E</td>
<td></td>
<td><strong>Reports-Accidents</strong>&lt;br&gt;Documentation of accidents involving grounds maintenance-owned equipment and vehicles.&lt;br&gt;&lt;br&gt;<em>Note:</em> 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.</td>
<td>ADM9910</td>
<td>If no injury, retain for five years and then destroy.&lt;br&gt;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.</td>
</tr>
<tr>
<td>PHPL08-27</td>
<td>P/E</td>
<td></td>
<td><strong>Reports-Monthly-Inspection</strong>&lt;br&gt;Reports documenting status of grounds such as care of turf, trees, shrubs and beds.&lt;br&gt;&lt;br&gt;<em>Note:</em> Inspections are completed by the manager or supervisor in conjunction with the lead worker and the individual groundskeeper who maintains the area.</td>
<td>ADM9910</td>
<td>Retain for five years, then destroy.</td>
</tr>
<tr>
<td>PHPL12-28</td>
<td>P/E</td>
<td></td>
<td><strong>Surveys- Customer Satisfaction</strong></td>
<td>ADM9900</td>
<td>Retain for the current year + 1 additional year.</td>
</tr>
</tbody>
</table>

*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).