

University Records Retention Schedule

The [University Records Retention Schedule](#) provides the following information (see *Figure 1* for example):

1. **Record Series Title—Function/Purpose.** Title and description of each record series.
2. **Official Copy.** Which office(s) are responsible for the official (primary) copies for the University.
3. **Retention and Disposition Action.** States how long the record should be kept, the trigger event for starting retention period, and disposition action.
4. **Other Copies.** Some records series may have secondary (duplicate) copies held by offices other than where the official copies are held.
5. **Other Copies Retention and Disposition.** Retention and disposition action for secondary copies that have a retention period other than “*retain for administrative purposes served, then destroy.*”
6. **Records Series Identifier and Location.** Each records series is assigned a disposition authority number (DAN). The DAN and the records retention table the records series resides in is noted at the bottom of each records series entry.

<p>Expenditure Transfer Request (WSU 1048)</p> <p>Used by budget administrator and Principal Investigator to transfer identifiable direct charges between funding sources.</p> <p>Note: This records series is discontinued as of January 1, 2021. Controller and departments are responsible for maintaining existing Expenditure Transfer Request forms until the end of the stated retention period. (Series to be removed from the retention schedule after June 30, 2027.)</p> <p>Official Copy: Controller</p> <p>Retention and Disposition: Retain for 6 years after end of fiscal year, then destroy. (<i>Legacy Record</i>)</p> <p>Other Copies: Any Department</p> <p>Other Copies Retention and Disposition: Retain for 2 years after end of fiscal year, then destroy.</p> <p>DAN 11-12-63483 (<i>Accounting Fiscal Records</i>)</p>

Figure 1

Records Retention at WSU

policies.wsu.edu/prf/records-retention-and-disposition/



WASHINGTON STATE
UNIVERSITY

Department Records Retention Schedules

Many records are maintained by just **one** University office or department. Those records series are located on unique department records retention schedules. (See *Figure 2*). Not all offices require a department records retention schedule. Refer to [Department Records Retention Schedules](#) for the entire list.

Department Records Retention Schedule					
This revised retention schedule has been approved by the State Records Committee and completely supersedes all previous schedules for records unique to this office. Refer to the All-University Schedule for retention periods of records common to many University offices. Contact Policies, Records, and Forms, telephone 509-335-2005.					
WSU1302-PAF001-1122					
Office Name Policies, Records, and Forms	Office I.D. # 1470	Records Coordinator Joy Faerber	Telephone 509-335-2005		
University Records Officer Deborah L. Bartlett	University Records Officer Signature 		Date Approved June 5, 2019		
Title and Description	OPR or OFM	Location of Other Copies	Retention and Disposition Action	Disposition Authority No.	Archival Designation / Remarks
Forms Users Database Database used to generate number series for tracking WSU Invoice vouchers. This database includes the WSU Invoice (Receivables System) number file.	OPR		Retain for 6 years after superseded then destroy.	05-02-60803	
Review Record Database summary of policies and procedures manuals revision drafts sent for review and approval.	OFM		Retain for 6 years after new section or revision published then destroy.	05-02-60804	

Figure 2

Create an “In-House” Schedule for Quick Reference

The entire all-University Records Retention Schedule is available in a read-only Word file that may be downloaded and used to create an “in-house” quick reference schedule that includes only the records series that department or office maintains. Perform the following steps to create an in-house quick reference schedule.

1. Download and open the [University Records Retention Schedule](#).
2. Locate the records series on the University schedule that your office retains, copy and paste the record series information over to your own in-house schedule.
3. If your department has a unique department schedule, add the records series from it on your in-house quick reference schedule, also.

Important! To ensure the in-house quick reference schedule is accurate at all times, always refer to the official University and department records retention schedules before disposing of or transferring any records held by the department.

Need More Information?

Contact: Policies, Records, and Forms; telephone [509-335-2005](tel:509-335-2005); e-mail policies@wsu.edu.