



STATE CONTROLLER'S OFFICE – BULLETIN 07-01-2022

Wisconsin Department of Administration – Division of Executive Budget and Finance

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Target Audience:

- Agency Financial Managers
- Agency Finance Staff

Update to *Wisconsin Accounting Manual* s. 14-03: Retention of Supporting Documentation

Background:

As previously shared with financial leaders, the DOA STAR Office, in collaboration with the State Controller's Office, State Records Center, and other business partners, has developed a records management solution within the STAR Finance Environment. This solution was deployed in May 2022 and enables transaction processors to apply Records Disposition Authorizations (RDAs) to attachments, allow for maintenance on these RDAs, assign event dates, and record disposition decisions.

As a result of this solution being implemented, the State Controller's Office has made updates to *Wisconsin Accounting Manual* s. 14-03, titled Retention of Supporting Documentation. The updated policy can be found [here](#), and important updates are highlighted below.

Highlighted Updates to s. 14-03:

- References to the OnBase system have been removed and, as appropriate, replaced by references to the STAR RDA solution deployed in May 2022.
- Additional clarification has been added related to steps an agency would need to take to *transition* official records from paper to electronic, including filing the *statement of intention form* (FORM PRB-004) with the Public Records Board.
- The SCO-created requirement to hold onto paper documents for 1-year after transitioning to electronic format has been removed.
- Links to the relevant STAR Resources on the STAR Confluence webpage related to procedurally attaching records into STAR, completing the disposition review cycle, and maintaining RDA information on records has been included.