

Duke University Controller's Division
Document Retention Inventory

Payroll and other tax-related documents filed with federal and state authorities (W2, 941, 1042s, etc.)

<u>Title of Record</u>	<u>Retention Period</u>
1099R	7 years
AP Check Request	7 years
Foreign Country/ Misc Recipient	7 years
ETR Payments	7 years
Misc Correspondence	7 years
Experimental Subject	7 years
Spreadsheet	7 years
Forms 941 & Support	7 years
Forms 945 & Support	7 years
Forms 1042 & Support	7 years
Form NC-5 & NC-3 & Support	7 years
VA-5 & VA-6 & Support	7 years
B-Notice Responses	7 years
B-Notice File from IRS	7 years
B-Notice Lists	7 years
E-filing Confirmations or copies of paper filings - 1099 Misc	7 years
E-filing Confirmations or copies of paper filings - W-2	7 years
E-filing Confirmations or copies of paper filings - 1099R	7 years
E-filing Confirmations or copies of paper filings - 1042S	7 years
E-filing Confirmations or copies of paper filings - 1098-T	7 years
E-filing Confirmations or copies of paper filings - 1098 Mortgage Int	7 years

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<u>Title of Record</u>	<u>Retention Period</u>
Amended forms - 1099 Misc	7 years
Amended forms - W-2	7 years
Amended forms - 1099R	7 years
Amended forms - 1042S	7 years
Amended forms - 1098-T	7 years
Amended forms - 1098 Mortgage Int.	7 years
1099 Support	7 years
W-2 Support	7 years
1099R Support	7 years
1042S Support	7 years
1098-T Support	7 years
1098 Support	7 years
Form 1099/1042s	7 years
Form W-2s	7 years
Annual Supplements	7 years
Unclaimed form W-2s	4 years?
1099	7 years
ETR 1099R	7 years
1042S	7 years
1042S	7 years
FICA-B	7 years
ETR 1042S	7 years
W-2	7 years