

Workday Worker Document Types

Note: This is the new structure of Workday Worker Documents (Employee Records that have been uploaded into the system). Workday Delivered Documents cannot be removed, so that is why we have them along with our custom document types. This is a living document and will be revised as necessary.

New Document Category Name	Previous Document Category Name	Description	File Type	Is this document likely part of the Official Personnel file?	Is this personnel record exempt from public disclosure?	Most applicable retention schedule under State laws	Data Classification Level	Roles that can view ONLY	Roles that can view, modify or remove (an audit trail would remain)
Audit - Retain for Audit Purposes Only	Retain for Audit Purposes Only	Documentation retained for auditing purposes only	Audit		Depends	Depends - Security Administrator to periodically review and purge as necessary	Level 3	N/A	System Administration
Benefits - PEBB		Enrollment, mid-year and other correspondence that reference the employee's PEBB benefits. PEBB arrears, Deceased Standard Ins. Standard Insurance Waiver for LT ST Leave is something that will need to be uploaded.	Benefits	Yes	Likely	5 years after separation	Level 2	Payroll Analyst	Agency Payroll Partner
Benefits - PERS		PERS corrections, contributions, correspondence, status checks	Benefits	Yes	Likely	75 year	Level 2	Payroll Analyst	Agency Payroll Partner
Benefits - Time Off/Leave		Extended, Intermittent, Paid Leave, Protected - fill out Paid Leave form (CHRO website) best practice	Benefits	Yes	Likely	5 years after separation	Level 2	Payroll Analyst	Agency Payroll Partner
Benefits - Unemployment		Wage verification, Frances	Benefits	Yes	Likely	5 years after separation	Level 3	Payroll Analyst	Agency Payroll Partner HR Partner
Certifications	Certifications	Workday Delivered	Personnel	Yes	Unlikely	3 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee Recruiter Workforce Liaison	HR Assistant HR Executive HR Partner Learning Partner Manager Safety Partner
Company Related Policy	Company Related Policy	Workday Delivered	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 1	Employee HR Analyst Payroll Partner	HR Assistant HR Executive HR Partner Learning Partner Manager Workforce Liaison
Compensation (Employee View)	Compensation - Pay Equity (Employee View)	Pay equity and allowance documentation (Lead work/ Team Lead)	Compensation	Yes	Unlikely	15 years, destroy 166-300-0040 (4)	Level 2	Employee Manager	Compensation Partner HR Assistant HR Executive HR Partner
Compensation - Pay Equity	Pay Equity - HR/Mgr	Proposed compensation hire bp, completed pay equity to evaluate the offer. (**Not Viewable to Employee)	Compensation	Yes	Unlikely	15 years, destroy 166-300-0040 (4)	Level 2 or 3	Manager	Compensation Partner HR Executive HR Partner
COVID Vaccination Documentation		COVID Vaccination Records	Medical	No	Likely	3 years after employee separation, destroy 166-300-0040 (8)	Level 3	HR Auditor	ADA Coordinatior COVID Vaccine Coordinator Employee HR Executive HR Partner

Education	Education	Workday Delivered	Other	Depends	Unlikely	3 years after position filled or recruitment cancelled, destroy 166-300-0040 (19)	Level 2	Employee Learning Partner	Compensation Partner HR Assistant HR Executive HR Partner Manager Recruiter Workforce Liaison
External Training Related Certificates	N/A	Completion certificates related to training taken outside of Workday Oregon offered content.	Personnel	Yes	Unlikely	2 years, destroy 166-300-0015	Level 1	Appointing Authority HR Analyst	Employee Workforce Liaison HR Assistant HR Executive HR Partner Manager Talent Partner Learning Partner HR Partner
Financial - Financial Disclosure	Financial Disclosure Form	Financial related documentation required by the agency	Financial	No	Likely	3 years after employee separation, destroy 166-300-0035 (2)	Level 2	Employee	Finance Partner HR Executive HR Partner Manager Workforce Liaison
Financial - Travel	Travel	Travel related documentation (i.e. TEDS, expense receipts)	Financial	Yes	Unlikely	6 years, destroy 166-300-0025 (39)	Level 2	Appointing Authority Employee HR Analyst	Financial Partner Manager Payroll Partner Workforce Liaison
Licenses	Licenses	Workday Delivered	Personnel	Yes	Unlikely	3 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee Recruiter Workforce Liaison	HR Assistant HR Executive HR Partner Manager Safety Partner
Medical	Medical	Secure medical file; health care/physician related documents	Medical	No	Likely	3 years after employee separation, destroy 166-300-0040 (8)	Level 3	Employee	Absence Partner HR Executive HR Partner Safety Partner
Medical - Absence Information	Other Medical Documents	Doctor's notes verifying absences. *Does not contain diagnosis information	Medical	No	Likely	3 years after employee separation, destroy 166-300-0040 (8)	Level 2	HR Analyst Payroll Partner Timekeeper	Absence Partner Employee Manager Workforce Liaison
Medical - ADA (Americans with Disabilities Act)	Americans with Disabilities Act	Full record of the interactive process required by the ADA i.e. notes, correspondence	Medical	No	Likely	3 years after employee separation, destroy 166-300-0040 (8)	Level 3		HR Executive HR Partner ADA Coordinator
Medical - Drug Testing	Drug Testing	Drug test documentation as required for position	Medical	No	Likely	166-300-0040 (6) (a) Retain positive test results: 5 years, destroy; (b) Retain negative test results: 1 year, destroy 166-300-0040 (6)	Level 3	Employee Manager	Absence Partner HR Assistant HR Executive HR Partner Pre-Employment Check Coordinator Safety Partner
Medical - Family & Medical Leave	Family & Medical Leave	Letters and notifications to employees related Family & Medical Leave. Do not include medical information.	Medical	No	Likely	3 years, destroy 166-300-0035 (5)	Level 3	Employee Agency Payroll Partner Timekeeper	Absence Partner HR Executive HR Partner Manager
Medical - Immunizations	Immunizations	Required immunizations documents	Medical	No	Likely	3 years after employee separation, destroy 166-300-0040 (8)	Level 2	Employee HR Partner	Absence Partner HR Executive Manager Safety Partner Workforce Liaison

Medical - Paid Leave Oregon	Paid Leave Oregon	Letters and notifications related to employee's Paid Leave Oregon. Do not include medical information	Medical	No	Likely	3 years, destroy 166-300-0035 (5)	Level 3	Employee Agency Payroll Partner Timekeeper	Absence Partner HR Executive HR Partner Manager
Medical - Personal Protection Leave	N/A	Secure file containing police reports, protective orders, and health care documentation (not related to medical leave)	Medical	No	Likely	3 years, destroy 166-300-0035 (5)	Level 3	Employee	Absence Partner HR Executive HR Partner Protected Worker Partner
Medical - Screenings	Screenings	TB, hearing screenings documentation	Medical	No	Likely	(b) Retain audiometric test records: until employee separation (29 CFR 1910.95), destroy	Level 3	Employee	Absence Partner HR Executive HR Partner Manager Pre-Employment Check Coordinator Safety Partner Workforce Liaison
Official Oaths	Official Oaths	Official Oaths of Board and Commission Member Appointees	Other	No	Likely	10 years after final term expires, destroy 166-350-0010	Level 1	Employee Governor's Policy Advisor	Governor's Executive Appointment Officer Board Administrator Partner
Offers	Offers	Workday Delivered - Same as Personnel - Offer Documents	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee HR Analyst Agency Payroll Partner	HR Assistant HR Executive HR Partner Manager Recruiter
Other - Administrative Actions	N/A	Confidential administrative actions that require State Payroll Partner view of documentation (i.e. Duty Station at Home).	Other	Yes	Unlikely	1 year, destroy 166-300-0040 (21)	Level 2	Agency Payroll Partner	HR Executive HR Partner
Other - Contingent Worker Documents	Contingent Worker Contract	Signed policies/other agreements (Volunteer/Contractor)	Other	No	Unlikely	No state personnel law	Level 2	Appointing Authority Employee HR Analyst	HR Executive HR Partner Manager Volunteer Coordinator Workforce Liaison
Other - Protected Worker	Protected Worker	Protected worker home/work contact information in accordance with state law	Other	No	Likely	10 years after employee separation, destroy 166-300-0040 (9)	Level 4	Employee HR Executive HR Partner	Protected Worker Partner
Other - State Property assigned to Employee	State Property Assigned to EE	Equipment provided to the employee to perform their work (cell phones, laptops, cars) not included in the asset survey	Other	Yes	Unlikely	3 years or until superseded, whichever is longer, destroy 166-300-0020 (1) (b)	Level 1	Employee HR Analyst	HR Assistant HR Executive HR Partner Finance Partner Manager Workforce Liaison
Other - Worker Documents	Other Worker Documents	Non-categorized Worker Documents. Provided Categories not applicable. Each document will need review at every purge cycle to ensure appropriate retention is followed. *This category is not to contain data security that exceeds Level 1.	Other	Depends	Depends	Depends	Level 1	Appointing Authority Employee HR Analyst Workforce Liaison	Compensation Partner HR Assistant HR Executive HR Partner Manager Recruiter
Payroll - Affordable Care Act	N/A	ACA Worksheet and related documents	Payroll	No	Unlikely	3 years after employee separation, destroy 166-300-0040 (7)	Level 2	Employee HR Analyst	HR Assistant HR Executive HR Partner Agency Payroll Partner
Payroll - Donated Leave	Donated Leave	Donated leave requests and related documents (non-medical)	Payroll	No	Unlikely	1 year, destroy 166-300-0035 (6)	Level 2	Appointing Authority Employee	Absence Partner HR Executive HR Partner Agency Payroll Partner

Payroll - Final Pay		Calculations, correspondence	Payroll	Yes	Likely	75 years	Level 3	Payroll Analyst	Agency Payroll Partner
Payroll - Financial Institution		Direct deposit, banking correspondence - redact account #	Payroll	Yes	Likely	7 years after separation	Level 3	Payroll Analyst	Agency Payroll Partner
Payroll - Military Duty	Military Duty	Active duty deployment documents	Payroll	No	Unlikely	4 years, destroy 166-300-0035 (3)	Level 3	Absence Partner Employee Payroll Partner	HR Assistant HR Executive HR Partner Manager Agency Payroll Partner Workforce Liaison
Payroll - Other Deductions		OSGP, union dues, food drive, Accounting check MARA	Payroll	Yes	Likely	5 years after separation	Level 2	Payroll Analyst	Agency Payroll Partner
Payroll - Other Pay		Payouts, reimbursements, per diems, underpayments, pay advance	Payroll	Yes	Likely	5 years after separation	Level 2	Payroll Analyst	Agency Payroll Partner
Payroll - Overpayments		Repayment agreements, correspondence, calculations	Payroll	Yes	Likely	5 years after separation	Level 2	Payroll Analyst	Agency Payroll Partner
Payroll - Seasonals		Onboarding, offboarding	Payroll	Yes	Likely	5 years after separation	Level 2	Payroll Analyst	Agency Payroll Partner
Payroll - State Housing Rental Agreement		State housing rental agreements between the state and employee	Payroll	No	Likely	Retain all other employee payroll records: 3 years after employee separation, destroy 166-300-0035 (d)	Level 2	Employee Payroll Partner	HR Executive HR Partner Manager Agency Payroll Partner Workforce Liaison
Payroll - Tax Related		W-4, W-2, tax authority correspondence	Payroll	Yes	Likely	5 years after separation	Level 3	Payroll Analyst	Agency Payroll Partner
Payroll - Wage Withholding		Garnishments, child support, tax levies	Payroll	Yes	Likely	5 years after separation	Level 3	Payroll Analyst	Agency Payroll Partner
Personnel - CDL	CDL	Commercial Drivers License and related documents	Personnel	Yes	Unlikely	3 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee Recruiter Workforce Liaison	HR Assistant HR Executive HR Partner Manager Safety Partner
Personnel - Conflict of Interest	Conflict of Interest	Signed Conflict of Interest documents	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee Finance Partner HR Analyst	HR Assistant HR Executive HR Partner Manager Workforce Liaison
Personnel - Disciplinary	Disciplinary	Finalized signed disciplinary document	Personnel	Yes	Unlikely	3 years, destroy 166-300-0040 (9). See applicable CBA or policy	Level 3	Appointing Authority Employee Manager	HR Executive HR Partner Talent Partner
Personnel - Educational Transcripts	Official Transcripts	Educational transcripts (i.e. high school, college, trade)	Personnel	Yes	Unlikely	3 years after position filled or recruitment cancelled, destroy 166-300-0040 (19)	Level 2 or 3	Employee	Compensation Partner HR Assistant HR Executive HR Partner Manager Recruiter Workforce Liaison
Personnel - Hire	Hire	Historical documents related to the initial hire to state service from prior to Workday systems	Personnel	Depends	Depends	Depends on the type of hire record.	Level 3	HR Analyst Employee	HR Assistant HR Executive HR Partner Recruiter
Personnel - Limited Duration Documents	Limited Duration Agreement	Signed limited duration agreements	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee HR Analyst	HR Assistant HR Executive HR Partner Manager Workforce Liaison

Personnel - New Employee Orientation Documents	New Employee Orientation Checklist	New employee orientation documents	Personnel	Yes	Unlikely	Retain 3 years, destroy 166-300-0040 (11)	Level 2	Employee HR Analyst	HR Assistant HR Executive HR Partner Manager Learning Partner Workforce Liaison
Personnel - Offer Documents	Offer Letter	Signed offer letters	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee HR Analyst Agency Payroll Partner	HR Assistant HR Executive HR Partner Manager Recruiter
Personnel - Performance and Trial Service	Performance and Trial Service	Performance and probationary/trial service documents	Personnel	Yes	Unlikely	3 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee	HR Assistant HR Executive HR Partner Manager Talent Partner
Personnel - Policies	Policies	Signed enterprise and agency specific policies	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 1	Employee Payroll Partner HR Analyst Security Partner	HR Assistant HR Executive HR Partner Learning Partner Manager Learning Partner Workforce Liaison
Personnel - Position Description	Position Description	Signed acknowledgement of the duties assigned to the employee	Personnel	Yes	Unlikely	Retain 3 years after superseded or obsolete, destroy	Level 2	Employee HR Analyst Position Analyst Position Manager	Compensation Partner HR Executive HR Partner Manager Recruiter Workforce Liaison
Personnel - Relocation	Relocation	Relocation documentation (i.e. receipts, relocation agreement).	Personnel	Yes	Unlikely	3 years after employee separation, destroy 166-300-0040 (9)	Level 2	Employee	HR Assistant HR Executive HR Partner Manager Recruiter Workforce Liaison
Personnel - Resignation	Resignation	Resignation notice/letter	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee Payroll Partner Agency Payroll Partner	HR Assistant HR Executive HR Partner Manager
Personnel - Rotation Documents	Rotation Contract	Signed job rotation agreements	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee HR Analyst	HR Assistant HR Executive HR Partner Manager Workforce Liaison
Personnel - Temporary Employee Documents	Temporary Agreement	Signed temporary employment agreement	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Appointing Authority Employee HR Analyst	HR Assistant HR Executive HR Partner Manager Workforce Liaison
Personnel - Termination	Termination	Termination Notice/Letter	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Manager	Appointing Authority HR Partner

Personnel - Working Remotely	Working remotely	In state and out of state remote work documents	Personnel	Yes	Unlikely	10 years after employee separation, destroy 166-300-0040 (9)	Level 2	Employee	HR Assistant HR Executive HR Partner Manager Workforce Liaison
Position Description	Position Description	Workday Delivered - Same as Personnel - Position Description	Personnel	Yes	Unlikely	Retain 3 years after superseded or obsolete, destroy	Level 1	Employee HR Analyst Position Analyst Position Manager	Compensation Partner HR Assistant HR Executive HR Partner Manager Recruiter Workforce Liaison
Recruitment - Reference Check	Reference Check	Reference check documentation (i.e. results, notes, reference release form)	Recruitment	No	Unlikely	3 years after position filled or recruitment cancelled, destroy 166-300-0040 (19)	Level 2		Appointing Authority HR Executive HR Partner Manager Pre-Employment Check Coordinator Recruiter
Recruitment - Veterans Documents	Veterans Documents	DD214/215, VA letter, VA disability letter *Do not include medical information	Recruitment	No	Unlikely	2 years, destroy 166-300-0040 (19) (b)	Level 3	Employee HR Analyst	HR Assistant HR Executive HR Partner Recruiter
Supervisory - Supervisory Files	Supervisory Files	Communications with employees/supervisor notes	Supervisory	No	Unlikely	Note from WD: 2 years after separation from agency, destroy -Past practice recommendation	Level 2	Appointing Authority HR Partner	HR Executive Manager

Workday Worker Document Types Version Tracking

Date	Version From	Version To	Document Category	Column Name	Change From	Change To
4.20.21	6	6.1	Medical Screenings	Retention	Level 4	Level 3
4.20.21	6	6.1	Certifications	Roles - Modify	N/A	Added Learning Partner
4.20.21	6	6.1	Company Related Policy	Roles - Modify	N/A	Added Learning Partner
4.20.21	6	6.1	Education	Roles - View Only	N/A	Added Learning Partner
4.20.21	6	6.1	Personnel - Policies	Roles - Modify	N/A	Added Learning Partner
4.20.21	6	6.1	Personnel - Discipline	Retention	10 years after employee separation, destroy 166-0040 (9). See applicable	3 years, destroy (166-300-0040 (9)). See applicable
4.20.1	6	6.1	External Training Related Certificates	All	N/A	Added Category
9.17.21	6	6.2	Covid Vaccination Documents	Roles - Modify	N/A	HR Partner HR Executive ADA Coordinator COVID Vaccine Coordinator Employee
9.17.21	6	6.2	Medical ADA	Roles - Modify	N/A	Added ADA Coordinator
9.17.21	6	6.2	All Categories Modified by HR Partner	Roles - Modify		Added HR Executive
12.22.21	6	6.3	Payroll - State Housing Rental Agreement	All	N/A	Added Category
12.22.21	6	6.3	Official Oath	Roles - Modify Roles - View Retention Public Disclosure Personnel File	N/A	Added information to blank columns
12.22.21	6	6.3	Personnel - Hire	Roles - View	N/A	Added Employee
01.31.22	6.3	7	Official Oath	Roles - Modify	Governor's Executive Appointment Officer	Governor's Executive Appointment Officer Board Administrator Partner
05.03.22	7	8	Compensation Pay Equity	Roles - View	N/A	Added Statewide Classification Analyst

12.20.22	8	9	Personnel - Termination	Roles - Modify	N/A	Added Category and shared with: Appointing Authority HR Partner Manager (view only)
05.03.23	9	10	Personnel - Medical (excluding ADA)	Roles - Modify	N/A	Added Absence Partner to all Medical categories, excluding Medical ADA
08.17.23	10	11	Medical Paid Leave Oregon	All	N/A	Added Category
08.15.24	11	12	Medical Personal Protection Leave	All	N/A	Added Category
04.23.25	12	13	Benefits - PEBB Benefits - PERS Benefits - Time Off/Leave Benefits - Unemployment Payroll - Final Pay Payroll - Financial Institution Payroll - Other Deductions Payroll - Other Pay Payroll - Overpayments Payroll - Seasonals Payroll - Tax Related Payroll - Wage Withholding	All	N/A	Added Categories