

Wright State University RECORDS RETENTION SCHEDULE (RRS)

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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 State Policy 12220](#). 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/Department Code: University President PRDT

Division: University Administration

Approvals

**Director/ Department Head/ Dean/
Appointed Liaison:** _____

University Records Manager: _____

¹**Medium code:** P=Paper, M=Microfilm/Fiche, E=Machine Readable

²**Value code:** C=Confidential, H=Historical, R=Restricted, V=Vital

³**Description:** A separate retention period is required for each medium in the same records series.

WSU Records Series Number	Medium Code ¹	Value Code ²	Records Series Title and Description ⁵	Retention Rule/ IUC Code	Retention Period
President's Office					
PRDT21-01	P/E	H	Accreditation-University Files documenting accreditation review by accrediting agencies. Includes original correspondence between NCA and the President's Office.	ADM3010/ IUC-ADM- 10-01	Retain four years after completion of the accreditation/ reaccrreditation process, then review for continuing value and transfer to Archives.
PRDT21-02	N/A	H	Awards and Objects Includes awards bestowed on the president of WSU as well as gifts to the president or the university by other institutions or community groups.	MIS2000	Transfer select objects of unique or historical value to Archives.
PRDT13-03	P/E	H	Cabinet Meetings-President's	ADM9910/ IUC-ADM- 00-05 IUC-ADM- 00-05	Transfer copy of minutes and reports to Archives after three years.
PRDT13-04	P/E	H	Calendars Event and activity calendars of University President	ADM9900	Transfer to Archives after three years.

***Note:** Longer term storage may include, but not be restricted to, archives, an institutional records storage center, and conversion to digital formats and/or microfilm or other acceptable mass storage media (per Sec. 9.01 of the Ohio Revised Code).

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PRDT13-05	P/E	H	<u>Committee Files-University-wide</u> Includes documentation on committees and task forces appointed by the president.	ADM9910/ IUC-ADM-00-05	Review every three years for continuing administrative value and transfer select records, such as <i>minutes</i> and <i>final reports</i> , to Archives.
PRDT13-06	P/E	H	<u>Correspondence-Administrative and Executive Memoranda</u>	ADM9910/ IUC-ADM-00-01	Retain in the office for three years and then transfer to Archives.
PRDT13-07	P/E	H	<u>Correspondence-Internal</u> Letters or memos addressed to deans, directors, or chairs or to the university community.	ADM9910/ IUC-ADM-00-01	Retain in the office for three years and then transfer to Archives.
PRDT13-08	P/E	H	<u>Correspondence-External</u> Correspondence with external organizations, coalitions, and consortia (regional, statewide, or national) in which WSU or the President holds membership.	ADM9910/ IUC-ADM-00-01	Retain in the office for three years and then transfer to Archives.
PRDT13-09	P/E	H	<u>Correspondence- Subject Files</u> Includes legal and controversial issues, presidential scholarships, and other subjects. <i>Note: The subject files are cross-referenced with the chronological correspondence files.</i>	ADM9910/ IUC-ADM-00-01	Retain in the office for three years and then transfer to Archives with the exception of restricted legal files (paper and electronic). Consult with General Counsel's Office for appropriate disposition requirements.

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PRDT13-10	P/E	H	<u>Events Files-University-wide</u> Includes documentation on university-wide events such as anniversaries, president's award for excellence recognition ceremonies, commencements, etc. This series also includes documentation on events taking place at the president's residence (Rockafeld House) and inaugurations of WSU's presidents.	PUB3000/ IUC-PUB- 00-06	Retain in the office for three years, then, review for historical value*
PRDT13-11	P/E	H	<u>Reports to the Board of Trustees</u> Periodic reports by the president to the Board of Trustees.	ADM9910/ IUC-ADM- 00-05	Retain permanently. Transfer originals to Archives every three years.
PRDT13-12	P/E	C	<u>Personnel Files- Department</u> Staff personnel files. Files can contain position descriptions, applications, letters of appointment or change, personnel data, notice of salary rate, annual contracts, performance evaluations, PERS forms, previous state service forms, reclassification notices, letters of commendation or reprimand, publications, evidence of continuing education, transfers, leave of absence requests, payroll forms, vacation and sick leave reports, resignations, termination notices. Review for continuing administrative value. <i>Note: Long-term information is held by Human Resources Office.</i>	PER3000/ IUC-HR-40- 21	Destroy six years after termination. If subject to legal action, retain until final disposition.
PRDT21-13	P/E	H	<u>Speeches-Presidential</u> Speeches and addresses of University President. Includes speeches/presentations presented virtually using online platforms*	ADM9910	Retain permanently. Transfer originals to Archives every three years. <i>*Transfer copies of online recordings only when/if these are the only version/format available</i>

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PRDT20-17	P/E	H	<p><u>Policies and Procedures- Wright State Policies and Procedures</u> Records documenting institution-approved methods or processes for performing activities to ensure uniformity and compliance with institution and legal requirements.</p> <p>Note: All Wright State Policies are available on line at: https://policy.wright.edu/</p>	ADM9910/ IUC-ADM-00-05	Retain permanently. Submit dated copy of each version to the University Archives once superseded.
PRDT20-18	P/E	H	<p><u>Strategic Plans- University</u></p>	ADM3010/ IUC-ADM-10-01	Retain until superseded. Transfer one copy to the University Archives once superseded.
PRDT13-19	P/E	H	<p><u>WSU Administrative Code</u> Body of internal management rules ("rules, regulations, bylaws, or standards governing the day-to-day staff procedures and operations within an agency," ORC, Sec. 111.15 (3)) established by WSU according to ORC, Sec. 3352.03.</p> <p>Note: All rules filed with the Legislative Service Commission of the State of Ohio.</p>	ADM9910/ IUC-ADM-00-05	Retain permanently. Submit dated copy of each version to the University Archives once superseded.
PRDT20-20	P/E	H	<p><u>Organization Charts</u></p>	ADM3300/ IUC-ADM-00-04	Retain while active + ten years. Submit one copy of each version to University Archives.

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