

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: Institutional Research & Effectiveness

INRE

Division: Executive Vice President/
Chief Operating Officer

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	IUC Number	Retention Period
INRE19-01	E	V	Reports- Dashboards Summary level dashboards of enrollment/admission statistics and related data sets.	EDU3000 IUC-EDU-30-01	To be retained permanently in University Archives. Send one PDF version of the sections of each report to the archives annually on a scheduled basis.
INRE19-02	E		Reports- External Requests Data requests from the general public and other external parties for non-confidential directory information, as defined by FERPA. Examples may include: lists of registered students, enrollments by cohort, and similar data sets. <i>Note: All data requests are archived into ticketing system in Qualtrics, which serves as record copy. Once delivered, IR&E does not retain copies of generated reports, which may be discarded at their discretion.</i>	EDU3000 IUC-EDU-30-01	Retain data requests for current year + 2 additional years.

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

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INRE19-03	E	R	<p>Reports- Internal Requests Ad hoc or standing requests for institutional data received by IR&E from university offices/ programs. May contain confidential information.</p> <p><i>Note: All data requests are archived into ticketing system on ServiceNow, which serves as record copy. Once delivered, IR&E does not retain copies of output reports, which may be discarded at their discretion.</i></p>	EDU3000 IUC-EDU-30-01	Retain data requests for current year + 2 additional years.
INRE19-04	E		<p>Surveys Institutional surveys prepared by IR&E for external reporting purposes. Surveys come in three primary categories, including:</p> <ol style="list-style-type: none"> Mandated: Aggregate student data reporting for mandated institutional data surveys, such as the Integrated Postsecondary Education Data Systems (IPEDS), and the Higher Education Information System (HEIS). Non-Compulsory: Includes surveys completed for national rankings and public reporting/ promotional purposes to provide relevant institutional data for students, their families, and participating institutions, such as The Common Data Set and the College Board Survey. National: National surveys completed in order to receive access to the compiled national student data in the survey report. Examples include the National Survey of Student Engagement (NSSE), and the Beginning College Survey of Student Engagement (BCSSE). 	EDU3000 IUC-EDU-30-01	<p>To be retained permanently in University Archives. Send one PDF version of each final report to the archives annually.</p> <p>Survey research materials may be disposed after 2 years.</p>
INRE10-01	P/E	C	<p>Personnel Files-Department* Personnel files of staff working for Institutional Research, including student employees. Files include performance evaluations, letters of recommendations, correspondence, applications/resumes, copies of contracts, vacation, sick, and professional leave information.</p> <p><i>*Note: Long-term information is held by Human Resources Office.</i></p>	PER3000 IUC-HR-40-21	Destroy within two years of termination. If subject to legal action, retain until final disposition.

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WSU Records Series Number	Medium Code ¹	Value Code ²	Records Series Title and Description ⁵	IUC Number	Retention Period
INRE10-02	P/E	C	<u>Personnel Files-Employee Selection</u> Vitae, letters, and other records of individuals who have applied for staff positions but were not hired.	PER2000 IUC-HR-40-04	Retain for three years then destroy.
INRE10-03	P/E	C	<u>Personnel Files- Recruitment Records</u> Job postings, interview questions, interview notes, status of position offer form, and other documentation required for EEOC compliance.	PER2000 IUC-HR-40-04	Retain for three years then destroy.
ENHS03-11	E/P		<u>Subject Files-Director's</u> Correspondence, reports, minutes, memoranda, and information files documenting the activities of the director's office.	ADM9910 IUC-ADM-00-01	Retain in the office for three years. Then, review for continuing administrative or historical value. Transfer records of historical value to University Archives.

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