

# Wright State University RECORDS RETENTION SCHEDULE (RRS)

New	
Revision	X
Addition	
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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](mailto:chris.wydman@wright.edu).

**Originating Office/Department Code:** Counseling and Wellness Services

CWS

**Division:** Student Affairs

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

<sup>2</sup>**Value code:** C=Confidential, H=Historical, R=Restricted, V=Vital

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

WSU Records Series Number	Medium Code <sup>1</sup>	Value Code <sup>2</sup>	Records Series Title and Description <sup>3</sup>	IUC Number	Retention Period
CWS99-01	P	C	<b>Client Charts-WSU Students</b> Chart includes "presenting problem(s), the date of service, purpose if not self-evident, and any test or other evaluative results obtained as part of the professional relationships.  <i>Note: Inactive client records stored at Counseling and Wellness Services.</i>	MED2020 IUC-MED-30-01	Maintain complete professional client record for seven years after last date of service.
CWS07-02	E	R/V	<b>Database-Client</b> Independent database backed-up by WSU's Computing and Telecommunications (CaTS). Inactive accounts automatically backed-up by CaTS. Contains client name, social security number, therapist name, insurance information, payment history, clinical services rendered, diagnostic codes, referring sources. Access restrictions.	MED2020 IUC-MED-30-01	Retain for <b>seven</b> years after last date of service, then erase.
CWS99-04	E/P	H	<b>Reports (Annual)</b> Reports compiled during every other academic year. Contain summary of Center's activities and financial status.	ADM9910 IUC-ADM-00-05	Retain in office for three years, then review for continuing administrative value.
CWS99-05	E/P	H	<b>Publications</b> Includes published material both paper and electronic produced by Counseling and Wellness Services.	PUB3000 IUC-PUB-00-05	Transfer one dated copy of each publication to the University Archives every 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).