

Wright State University RECORDS RETENTION SCHEDULE (RRS)

New	
Revision	X
Addition	
Page	1 of 4

Instructions: This form establishes a schedule of retention and disposal for the listed records series according with 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, Dunbar Library, R-401-402. For assistance, contact the University Records Manager at ext. 2017 or write to chris.wydman@wright.edu.

Originating Office/Department Code: Pre-College Programs PCPR

Division: Student Affairs

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
PCPR11-01	P/E		<p><u>Accounting Records-Fees/Refunds/Scholarships</u> This series includes: 1) Yearly account books (copies of statements/invoices, DPO copies, 1100/1200 Budget Transfers) filed by account 2) Revenue/Refund/Deposit Correspondence 3) Labor and Student Worker Wage Reports (copies) 4) Yearly Account Budget 5) Scholarship Fee Payment Records 6) Credit card memo statements for supervisor's approval 7) Sales tax exemption certificate and information 8) Registration invoices/payment documentation (originals) 9) Payment receipt books (originals) 10) Yearly program income/financial report.</p> <p><i>Note: Original budget documentation maintained by the WSU Budget office.</i></p>	ACC1000 IUC-ACC-00-02	Retain for four years and then destroy. *For credit card and procurement card records, please refer to general schedule http://www.wright.edu/cats/rr/forms/general.html
PCPR11-02	P/E		<p><u>Agreements/Contracts</u> Includes original employment agreements with instructors as well as partnership agreements with middle schools and high schools.</p>	LEG2000 IUC-LEG-00-01	Retain while active plus three years then review for continuing administrative or historical value. *

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).

Wright State University
RECORDS RETENTION SCHEDULE (RRS)
 (continuation sheet)

New	
Revision	X
Addition	
Page	2 of 4

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 ³	IUC Number	Retention Period
PCPR11-03	P/E	C	Medical Care Records All documentation related to treatment received by students or staff during camps and programs.	LEG3000 IUC-LEG-00-01	Adults: retain two years after treatment Minors: retain until age of majority + two years. Exception: For records created during ACA accreditation, records must be retained 20 years as per ACA requirement.
PCPR07-04	P	C	Permission for Medical Treatment/ Liability Release Forms Release forms submitted by all students and staff participating in programs authorizing medical treatment in case of illness or injury.	LEG3000 IUC-LEG-00-01	If no treatment needed, retain two years then destroy. If treated, retain as per policy for Medical Care records, (see above.)
PCPR07-05	P	C	Personnel Files-Department Staff personnel files. These include performance evaluations, letters of recommendations, correspondence, resumes, copies of contracts, vacation and sick leave information. Note: Long-term information is held by Human Resources Office.	PER3000 IUC-HR-40-21	Destroy six years after termination. If subject to legal action, retain until final disposition.
PCPR07-06	P	C	Personnel Files-Employee Selection Includes vitae, letters, records of individuals who have applied for staff positions in Pre-College Programs.	PER2000 IUC-HR-40-04	Retain for three years then destroy.

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).

Wright State University
RECORDS RETENTION SCHEDULE (RRS)
 (continuation sheet)

New	
Revision	X
Addition	
Page	3 of 4

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 ³	IUC Number	Retention Period
PCPR08-07	P/E	H	<p>Programs-Department Includes administrative files (class lists, class grid, mailing lists, and copies of all documentation for each year's program) of the following programs:</p> <ul style="list-style-type: none"> a) Saturday Enrichment (K-9) b) Summer Programs (Discovery, Residential camps, and Residential Institute) c) Ohio Summer Institute Honors Program (for gifted Ohio students only-grant-funded, 10th/11th grades) d) Upward Bound Program 	ADM9910 IUC-ADM-00-05	<p>a/ b/c) Review periodically for continuing administrative value. Transfer historical records on development and administration of the programs to the Archives every three years.</p> <p>d) Retain for 3 years and until all audit requirements are completed.</p>
PCPR07-08	P	H	<p>Publications-Departmental Publications such as brochures, newsletters and other material produced by the department describing its programs and special events.</p>	PUB3000	Retain in the office for three years and then transfer to the University Archives.
PCPR07-09	P/E		<p>Reports-Statistical/Customer Service This includes statistical reports compiled with data from the Student Enrollment Database as well as reports summarizing results of surveys. Examples of reports include: Program annual reports, ethnicity reports, community advisory board meeting minutes, program registration/housing/meals statistics, program assessment and evaluation statistics.</p>	ADM9910 IUC-ADM-00-05	Retain in the office for three years and then transfer final reports to the University Archives.
PCPR07-10	P	C	<p>Student Records-Non-Permanent-Student Enrollment Database Database (MS Access) contains student profile and enrollment information. <i>Note: The database was created in 1999.</i></p>	ADM9910 IUC-ADM-00-05	Maintain continually updated.

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).

Wright State University
RECORDS RETENTION SCHEDULE (RRS)
 (continuation sheet)

New	
Revision	X
Addition	
Page	4 of 4

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 Code¹	Value Code²	Records Series Title and Description³	IUC Number	Retention Period
PCPR07-11	P/E		<u>Survey/Evaluation Forms</u> This includes evaluative questionnaires on the organization and quality of the Pre-College Programs.	ADM9910 IUC-ADM-00-05	Retain for one year after the completion of the pertinent reports and then destroy.
PCPR07-12	P/E		<u>Subject Files- Director's</u> Includes correspondence, reports, minutes, memoranda, policy and informational files as well as historical information on the development of the Pre-College Programs.	ADM9910 IUC-ADM-00-05	Retain in the office for three years. Then, review for continuing administrative or historical value.

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).