

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: Lake Campus- Student Affairs LCSS

Division: Provost- Administrative Divisions and Regional Campus

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
Student Affairs- Academic/Career Advising					
LCSS24-01	E		Academic Advising Guidelines and Policies Guidelines and policies for academic advising services used by students.	ADM3000/ IUC-ADM-10-01	Retain until superseded + 10 additional years
LCSS24-02	P/E		Academic Advisors Records Includes notes about student, possible courses the student would take, advisor worksheets, and correspondence with the student.	EDU1010/ IUC-EDU-35-30	Retain while student is enrolled at university + 5 additional years
LCSS24-03	P/E		Academic Advising Reports Aggregate reports listing individual students, student performance, student progress towards degree, or other related information.	EDU3000/ IUC-EDU-30-01	Retain for duration of advising assignment or until superseded.
LCSS24-04	E		Employment Postings— On-Campus and Off-Campus On-campus and off-campus employment opportunities.	MAR1000/ IUC-PUB-00-02	Retain while current then destroy/delete.
LCSS24-05	P/E		Event Files Includes publicity and employer registration. <i>All events/marketing/publicity done for Academic/Career Advising.</i>	PUB3000/ IUC-PUB-00-04	Retain while active.
LCSS24-06	E	H	Program Data Reports	ADM9910/ IUC-ADM-00-05	Publish annually online. Retain two years then review for ongoing administrative or reference value.

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Academic/Career Advising, cont'd					
LCSS24-07	P/E		Release Forms Release forms signed by students/staff/alumni granting permission to use their likeness (i.e. photographs), testimonials or similar items in official publications, websites or other marketing pieces produced for Academic/Career Advising.	PUB3000/ IUC-PUB-00-04	Retain for 5 years and/or until publicity piece is superseded or discontinued.
LCSS24-08	E	C	Student Files-Co-operative Education Program Individual files on undergraduate and graduate students (active, inactive, and graduated); includes resume and summary of assignments.	ADM9910/ IUC-ADM-00-05	Retain for one year after graduation or withdrawal then destroy. Note: Destruction of records should be performed in a manner that maintains confidentiality as per FERPA.
LCSS24-09	P/E		Student Records Record of academic work pursued, entrance exams, petitions, transcripts from transfer institutions, and related records regarding a student's academic history and success.	EDU1010/ IUC-EDU-35-30	Retain while student is enrolled at university + 5 additional years
Student Affairs/ Enrollment Services					
LCSS24-10	P/E	C	Application Files for Applicants Who Do Not matriculate Records related to applicants who do not matriculate, whether denied admission or accepted and do not enter. Includes applications for admissions/readmissions, correspondence, letters of recommendation, entrance examinations and placement test reports, advanced placement records, and transcripts. This series also includes transcripts not accompanied by application forms.	University General Schedule (GS03)	Retain for one year after application and then destroy. Note: <i>This records series is covered by the General Schedule therefore a Certificate of Destruction is not required when records are destroyed. Destruction of records should be performed in a manner that maintains confidentiality according to FERPA.</i>

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Enrollment Services					
LCSS24-11	E	C	<u>Application Files for Applicants Who Matriculate</u> Records related to applicants who matriculated. Includes applications for admissions/ readmissions, "non-routine" letters, correspondence, letters of recommendation, entrance examinations and placement test reports, advanced placement records, and academic transcripts as well as residence information.	EDU1010/ IUC-EDU-35-30	Retain while active plus 1 year. <i>Note: Destruction of records should be performed in a manner that maintains confidentiality according to FERPA.</i>
LCSS24-12	E	C	<u>Application Information for Applicants Who Matriculate (SalesForce)</u> Records related to applicants who matriculated. Includes information transferred from the application for admission/readmission, information on entrance examinations and placement test reports, advanced placement records, and record of transcripts received. <i>NOTE: WSU Admissions utilizes Salesforce (SM) to process applications, which pushes the data to Banner as system of record</i>	EDU1010/ IUC-EDU-35-30	Retain while active + 5 years then delete from system
LCSS24-13	E	H	<u>Policies and Procedures-Department</u> Includes standard operating procedures.	ADM9910 IUC-ADM-00-05	Retain while active plus ten years. Transfer one paper copy of each version to the University Archives.
LCSS24-14	P/E	H	<u>Recruitment Materials</u> Brochures, publications and other recruitment materials produced by the department to provide to prospective students.	PUB6000 IUC-PUB-00-05	Retain in the office for three years and then transfer one copy of each publicity item to the University Archives.

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Student Affairs/ Student Services					
LCSS24-15	E		<u>Change of Course Schedule (Add/Drop/Withdrawal)</u>	EDU1010/ IUC-EDU-35-30	Retain for three years after the term that it was changed.
LCSS24-16	E		<u>Class Registration Schedule</u> List of classes taken by a student in a given term.	EDU1010/ IUC-EDU-35-30	Retain paper form for three years. Retain information in Banner permanently.
LCSS24-17	P		<u>FERPA/Requests and Disclosures of Personally Identifiable Information--Other than student requested</u> a) Forms filed alphabetically and by year. b) Forms are valid for one year. c) Have to have written permission by the student per FERPA requirements.	EDU1030/ IUC-EDU-10-13	Retain while active (current academic year) plus three years and then destroy.
LCSS24-18	P		<u>FERPA/Student's Written Consent for Records Disclosure</u>	EDU1030/ IUC-EDU-10-13	Retain while active (current academic year) plus three years and then destroy.
LCSS24-19	P		<u>FERPA/Student Request for Nondisclosure of directory information</u> <i>Note: Have to have written permission by the student per FERPA requirements.</i>	EDU1030/ IUC-EDU-10-13	Retain while active (current academic year) plus three years and then destroy.
LCSS24-20	P		<u>FERPA/Transcript Requests--Other than student requested</u> <i>Note: Have to have written permission by the student per FERPA requirements.</i>	EDU1000/ IUC-EDU-35-02	Retain permanently.
LCSS24-21	E		<u>Hold or Encumbrance authorizations</u> <i>Note: Received from bookstore or parking offices</i>	EDU1010/ IUC-EDU-35-30	Retain until released.
LCSS24-22	P		<u>Veterans-Student Records</u> <i>Note: Originals held by federal Department of Veterans Affairs. Lake Campus Student Services office retains copies of all records pertaining to the courses taken (entered into Banner) and related benefits (not in Banner).</i>	EDU1010/ IUC-EDU-35-30	Retain seven years after last active term. Destroy after completion of state and federal audits. Note: a) State audit: annual b) Federal: every three years.

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Student Affairs/ Library & Learning Center					
LCSS24-23	E		Inter-Library Loan Borrowing Requests Patron Request Form to borrow items from an outside library. This series includes both filled and unfulfilled requests. <i>Note: The 3-year retention satisfies copyright law requirements.</i>	ADM9900/ IUC-ADM-00-01	Retain for three years, then destroy electronic records.
LCSS24-24	E		Inter-Library Loan Lending Requests Electronic requests from outside libraries to borrow materials. This series includes both filled and unfulfilled requests. <i>Note: If invoice is generated, a copy is retained in Administrative Office of the University Libraries.</i>	ADM9900/ IUC-ADM-00-01	Retain for three months, then destroy electronic records.
LCSS24-25	P	H	Publications-Library Publications such as brochures, newsletters and other material produced by the Lake Campus describing its programs and special events.	PUB3000/ IUC-PUB-00-04	Retain permanently.
LCSS24-26	P/E	H	Reports-Annual Report submitted annually to the University Librarian and included in the overall report of the University Libraries.	ADM9910/ IUC-ADM-00-05	Retain in the office for ten years and then review for continuing administrative value.
LCSS24-27	P/E		Reports-Statistical-Instructional Activity Statistical information on instructional services provided at the Lake Campus.	ADM9900/ IUC-ADM-00-01	Retain for one year, then review for continuing administrative value.
LCSS24-28	P/E		Reports-Statistical-Reference Activity Statistical information on reference services provided at the Lake Campus.	ADM9900/ IUC-ADM-00-01	Retain for three years, then review for continuing administrative value.
LCSS24-29	P/E	H	Subject Files-Lake Campus Librarian Correspondence, reports, minutes, memoranda, and information files documenting the activities of this office.	ADM9910/ IUC-ADM-00-05	Retain for three years, then review for continuing administrative or historical value.

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