

# 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 Way Policy 2501](#). 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:** School of Medicine Advancement, SMAD  
Director's Office

**Division:** Boonshoft School of Medicine  
Approvals Date:

**Dean/Director/Head:** \_\_\_\_\_

**Department Chairperson/Manager:** \_\_\_\_\_

**University Records Manager:** \_\_\_\_\_

**University Archivist:** \_\_\_\_\_

<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>5</sup>	IUC Number	Retention Period
SMAD01-01	E	C	<b>Database-WSU Academy of Medicine</b> Database (FileMaker Pro) for maintenance of membership and solicitation lists. Occasionally used to generate statistical and comparison reports.	ADM9910	Maintain continually updated.
SMAD01-02	E	C	<b>Database-WSU Class Notes</b> Contains personal/professional updates submitted by alumni either online or via mail. The information appears in the School of Medicine <i>Vital Signs</i> .	ADM9910	Maintain continually updated.
SMAD01-03	P/E	C/H	<b>Donor Files</b> Files pertaining to SOM donor relations. Includes correspondence, newspaper clippings, and a) proposals on corporate donors, foundations, and individuals and b) fund-raising proposals compiled by the SOM University Development officer for the University Development office.  <i>Note: No accounting information in hard copy is held in donor files.</i>	ADM9910	Retain in the office indefinitely. Periodically review for continuing administrative or historical value. * Periodically transfer <b>select records</b> to the University Archives.

**\*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).

# Wright State University

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SMAD01-04	P/E	H	<p><b>Events Files</b> Files pertaining to fund-raising events such as:</p> <ul style="list-style-type: none"> <li>➤ Academy of Medicine Annual Dinner (maintained with Academy of Medicine administrative files)</li> <li>➤ Graduation</li> <li>➤ Match Day (Residency announcement)</li> <li>➤ One-time events (SOM departments)</li> <li>➤ Pruett Recognition Ceremony (donor scholarships)</li> <li>➤ Reunion</li> </ul> <p><i>Note: This series is arranged alphabetically by name of event and chronologically. It includes photographs. These are filed with the corresponding event.</i></p>	ADM9900	Retain in the office for three years, and then review for continuing administrative and historical value. Transfer <b>select records</b> to the University Archives.
SMAD01-05	P	C	<p><b>Personnel Files-Department</b> Active and inactive personnel files of staff members. These include performance evaluations, letters of recommendations, correspondence, resumes, copies of contracts, vacation and sick leave information.</p> <p><i>Note: Long-term information is held by Human Resources Office.</i></p>	PER3000	Destroy within two years of termination. If subject to legal action, retain until final disposition.
SMAD01-06	P/E	C	<p><b>Personnel Files-Search</b> Vitae, letters, and records of individuals who have applied for staff positions.</p>	PER2000	Retain for three years, then destroy.

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SMAD01-07	P	H	<b><u>Publicity-Departmental</u></b> This series includes records related to the public relations activities of the Alumni Relations office such as: a) Reunion newsletter (annual) b) Brochures (Only the ones originated by this office). c) Event listings d) Photos	PUB3000	Retain three years in the office. Transfer one copy of each to the Archives once a year. Destroy extra copies when of no further administrative value.
SMAD01-08	P/E		<b><u>Reports-Statistical-Internal</u></b> Includes year-end reports and SOM donor profiles.	ADM9910	Retain in the office for three years. Then, review for continuing administrative value. Transfer one copy annually to the University Archives.
SMAD01-09	P/E	H	<b><u>Subject Files-Departmental</u></b> Files on activities, programs, etc. (example: Academy of Medicine files)	ADM9910	Retain for three years, then review for continuing administrative or historical value. *
SMAD01-10	P/E	H	<b><u>Subject Files-Director's</u></b> Correspondence, reports, minutes, memoranda, and information files documenting the activities of the SOM Advancement office.	ADM9910	Retain for three years, then review for continuing administrative or historical value. *

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