

Wright State University RECORDS RETENTION SCHEDULE (RRS)

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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 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.

Originating Office/Department Code: Associate Dean for Fiscal Affairs FAMD

Division: Boonshoft School of Medicine Date:

Approvals

Dean/Director/Head: _____

Department Chairperson/Manager: _____

University Records Manager: _____

Head, Special Collections & Archives: _____

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
FAMD02-01	P/E	V/H/C	<u>Agreements/Contracts</u> Original records related to obligations under contracts, leases, and other agreements between the School of Medicine and hospitals and outside clinical agencies (i.e., U.M.S.A). Includes government contracts and grants and records required to be kept until government audit. (one original in General Counsel's office, one original in Fiscal Affairs, multiple copies at affiliated hospitals).	LEG2000	Retain while active plus five years. Then, review for continuing administrative value and historical value. Note: Some of the information may be covered under the Health Insurance Portability and Accountability Act (HIPAA).

***Note:** Longer term storage may include, but not 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
RECORDS RETENTION SCHEDULE (RRS)
 (continuation sheet)

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WSU Records Series Number	Medium Code ¹	Value Code ²	Records Series Title and Description ³	IUC Number	Retention Period
	P/E		Accounting Records Includes payroll reconciliation documentation and internal purchasing transactions (i.e., operational and grant-related).	General Schedule 01	Retain for one year in the office, transfer for two years to inactive records and then destroy.
	P/E		Budget Records Includes duplicate files of: a) Overall budget-School of Medicine (originals in the University Controller's office b) Budget-Departments (originals in the University Controller's office) c) Budget-Grant-related projects (originals in the of office of Research and Sponsored Programs)	General Schedule 05	Retain for one year in the office, transfer for two years to inactive records and then destroy.

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