

# 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.wydmann@wright.edu](mailto:chris.wydmann@wright.edu).

**Originating Office/Department Code:** Student Affairs/Admissions/Financial Aid SMSA

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

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

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

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

**Head, Special Collections & Archives:** \_\_\_\_\_

<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
<b>ADMISSIONS OFFICE</b>					
SMSA10-01	P/E	C	<p><b>Application Files</b> Includes application, transcripts, recommendation letters, autobiographical statements, GRE scores (can be used up to three years) as well as additional documentation of a) non-admitted and b) enrolled students.</p> <p><i>Note: grade card, student profile and AMCAS application documents are transferred to the permanent academic student file. See "Student Files-Permanent" records series.</i></p>	EDU1010	<p>Retain permanently, except for letters of recommendation, which are to be destroyed after admission decision by department.</p> <p><i>Note: Destruction of records should be performed in a manner that maintains confidentiality as per FERPA.</i></p>
SMSA10-02	P	C	<p><b>Committee-Selection</b> Bi-weekly meeting minutes of Selection Committee. Committee consists of all SOM faculty, community members and area practitioners.</p> <p><i>Note: Files are arranged in a) incomplete (missing documentation) and b) complete (include assessment form for submittal to the Selection Committee).</i></p>	EDU1010	<p>Retain for two years after completion of processing and then destroy.</p> <p><i>Note: Destruction of records should be performed in a manner that maintains confidentiality as per FERPA.</i></p>

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SMSA10-03	E	C	<b><u>Database-AMCAS</u></b> Online database containing application information.	ADM9900	Retain information until superseded or obsolete.
SMSA10-04	E	C	<b><u>Database- ERAS</u></b> Online database containing residency application information	ADM9900	Retain information until superseded or obsolete.
<b>GRADES AND STUDENT RECORDS/SPECIAL EVENTS</b>					
SMSA10-05	P	C	<b><u>Committee-Student Promotion</u></b> Reports and minutes regarding promotion of BSOM students.  <i>Note: The letters of opinion are filed in the individual student files.</i>	EDU1000	Retain permanently in the School of Medicine.*
SMSA10-06	E	C	<b><u>Database- RMS</u></b> Online database containing evaluation and grade information.	EDU1000	Retain information until superseded or obsolete.
SMSA00-07	P/E	H	<b><u>Events-BSOM- Internal</u></b> Includes correspondence, working papers, and general information on organization of SOM events such as awards programs, convocation and graduation ceremonies, the Medicine Ball, etc.  <i>Note: For accounting records included in this series refer to the General Schedule series GS09 and GS10.</i>	ADM9900	Retain printed publicity material in the office for five years, then transfer to the University Archives.

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SMSA10-08	P/M/E	C	<p><b>Student Files-Permanent</b> Files on student enrolled in School of Medicine. Each individual file includes:</p> <ul style="list-style-type: none"> <li>➤ MCATS scores</li> <li>➤ National Board scores</li> <li>➤ Transcripts</li> <li>➤ Evaluations</li> <li>➤ Copy of diploma</li> <li>➤ Correspondence</li> <li>➤ Copy of admissions application</li> </ul> <p><b>Note1:</b> Student files 2006-present are retained in electronic format only. All hard copies are converted to electronic images. Electronic copies are stored on university servers located in the secure CaTS server room. Servers are backed up daily with backup copies stored both on campus and offsite.</p> <p><b>Note2:</b> In addition to electronic format, student files 1980-2005 are also available on microfilm. The masters are stored in the University Archives. Duplicates are available in the Student Affairs office.</p>	EDU1000	<p>Retain permanently. Destroy originals after conversion to electronic format once QC of all scanned documents has been completed and verified. Test for degradation periodically. Refresh media and migrate data as needed, (recommended every 5 years.)</p> <p><b>Note:</b> Destruction of records should be performed in a manner that maintains confidentiality as per FERPA.</p>
<b>ADMINISTRATIVE RECORDS</b>					
SMSA10-09	P/E		<p><b>Subject Files-Associate Dean for Student Affairs /Admissions</b> Includes correspondence, reports, minutes, memoranda, policy and informational files.</p>	ADM9910	Retain in the office for three years. Then, review for continuing administrative or historical value.*
SMSA10-10	P/E		<p><b>Subject Files-Assistant Dean for Admissions</b> Includes correspondence, reports, minutes, memoranda, policy and informational files.</p>	ADM9910	Retain in the office for three years. Then, review for continuing administrative or historical value.*
SMSA10-11	P/E		<p><b>Subject Files-Assistant Dean for Diversity and Inclusion</b> Includes correspondence, reports, minutes, memoranda, policy and informational files.</p>	ADM9910	Retain in the office for three years. Then, review for continuing administrative or historical value.*

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SMSA10-12	P/E		<b><u>Subject Files- Associate Director for Academic Support and Recruitment</u></b> Includes correspondence, reports, minutes, memoranda, policy and informational files.	ADM9910	Retain in the office for three years. Then, review for continuing administrative or historical value.*
<b>CREDIT COURSE SCHEDULING AND STUDENT MEDICAL RECORDS</b>					
			<b>Note:</b> For Immunization Database refer to the retention schedule of the Student Health Department.		
SMSA10-13	E/P		<b><u>Database-GradeStar (OMNIS)</u></b> Inactive database of transcript and grade data for years 1980-2008. Data migrated to MedSIS, QC pending. GradeStar to be eliminated once student data in MedSIS is verified.	ADM9900	Retain information until superseded or obsolete.

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<b>FINANCIAL AID</b>					
SMSA10-14	E	V/C	<p><b><u>Banner-Financial Aid</u></b> Application suite for tracking current, past due, and paid-in-full accounts (financial history, including loans and scholarships).</p> <p><i>Note: System maintained by CaTS, student data managed by BSOM. System is backed up daily.</i></p>	EDU2000	Maintain continuously updated.
SMSA10-15	P	V/C	<p><b><u>Student Loans-External/Internal</u></b> This series includes</p> <ul style="list-style-type: none"> <li>a) <b>Internal:</b> short-term loan promissory notes (all delinquent notes/accounts are sent to Student Loan Collections, Bursar's Office). Originals in Student Loan Collections, duplicates in SOM Financial Aid office.</li> <li>b) <b>Internal</b> campus-based loan programs. Originals in Student Loan Collections. No documentation held in SOM Financial Aid office.</li> <li>c) <b>External:</b> loan contracts between the students and the School of Medicine. Originals with the lender. Duplicates in SOM Financial Aid office. Student also maintains a copy.</li> </ul> <p><i>Note: Loan files are arranged by academic year (graduating class) and last/first name</i></p>	EDU2000	<ul style="list-style-type: none"> <li>a) Retain duplicates until paid in full plus four years.</li> <li>b) Refer to Bursar's office records retention schedule, records series BURS99-22.</li> <li>c) Destroy duplicates after graduation.</li> </ul> <p><i>Note: Destruction of records should be performed in a manner that maintains confidentiality as per FERPA.</i></p>
SMSA10-16	P/E	V/H	<p><b><u>Scholarships</u></b> Includes applications, correspondence, and general information on scholarships (federal, Boonshoft School of Medicine, and external sources) awarded to Boonshoft School of Medicine students.</p>	EDU2000	<p>Retain while active plus six years, then destroy. Retain list of recipients and scholarship awarded permanently.*</p> <p><i>Note: Destruction of records should be performed in a manner that maintains confidentiality as per FERPA.</i></p>

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