

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, 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: Department of Health, Physical Education, and Recreation **EDPE**

Division: College of Education and Human Services

Approvals **Dean/Director/Head:** _____ **Date:** _____

Department Chairperson/Manager: _____

University Records Manager: _____

Head, Special Collections and 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
EDPE04-01	P	C	<u>Personnel Files-Faculty Activity Reports</u> Activity reports for the calendar year listing activities and accomplishments in teaching, research, and service. <i>Note: Activity reports are not included in AAUP's article 13.</i>	PER3000	Retain in department for two years after the end of the last WSU assignment and then review for continuing administrative value.
EDPE04-02a	P	C	<u>Personnel Files-Adjunct Professors</u> <i>Note: Long-term information is held by Human Resources Office.</i>	PER3000	Retain summarized records in the department for two years and then review for continuing administrative value.

***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)

New	
Revision	x
Addition	
Page	2 of 4

¹Medium code: P=Paper, M=Microfilm/Fiche, E=Machine Readable

²Value code: C=Confidential, H=Historical, R=Restricted, V=Vital

³Description: 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
EDPE04-02b	P	C	<p><u>Personnel Files-Faculty</u> a) Full-time Faculty (including Lecturers, Clinical, Instructors, Visiting Appointments) This series include the following documents (article 13 of the Collective Bargaining Unit Agreement between WSU and WSU-AAUP):</p> <ol style="list-style-type: none"> The offer letter (applies to bargaining unit and non-bargaining unit faculty) A copy of the criteria signed by the Bargaining Unit Faculty Member and the Department Chair (attached to the letter) A signed copy of any changed criteria and/or procedures A signed copy of any written agreements about changes to the probationary period (untenured faculty) Annual evaluations by supervisor and any written rebuttals to the annual evaluation (applies to bargaining unit and non-bargaining unit faculty) Peer evaluations (from the Promotion and Tenure Committee), when available Annual statements summarizing cumulative progress toward tenure from the Department Chair and from the Department Promotion and Tenure Committee Annual and triennial statements summarizing cumulative progress toward promotion from the Department Promotion and Tenure Committee (tenured associate professors) Student evaluations of professors and their courses. (maintained by departments-see departmental records retention schedules) <p>Notes: i) Bargaining Unit faculty member files may contain all 9 items; Other files (i.e., administrators and non-Bargaining-Unit faculty members) will typically contain items 1, 5, and 9. ii) Long-term personnel information is maintained by the office of Human Resources.</p>	PER3000	<p>Retain 1-8 in the Dean's office for two years after the end of the last WSU assignment and then review for continuing administrative value.</p> <p>9. Retain forms or the transcribed comments and all quantitative reports in the Dean's office for at least 7 years. When removing student evaluation forms, transcribed comments, or quantitative reports, the college will send them to the full-time faculty member to whom they pertain.</p>

*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)

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
EDPE04-02c	P	C	<u>Personnel Files-Staff-Department*</u> Staff personnel files. These include performance evaluations, letters of recommendations, correspondence, resumes, copies of contracts, vacation and sick leave information. <i>*Note: Long-term information is held by Human Resources Office.</i>	PER3000	Destroy within two years of termination. If subject to legal action, retain until final disposition.
EDPE00-03	P	C	<u>Personnel Files-Employee Search</u> Vitae, letters, records of individuals who have applied for faculty and staff positions in the department of Health, Physical Education and Recreation.	PER2000	Retain for three years, then destroy.
EDPE00-04	P/E	H	<u>Programs-Department</u> Includes administrative files on academic programs developed by the department.	ADM9910	Review periodically for continuing administrative value. Transfer historical records on development and administration of the programs to the Archives every three years.

***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)

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 Code ¹	Value Code ²	Records Series Title and Description ³	IUC Number	Retention Period
EDPE00-05	P	H	Publications Publications such as brochures and other material produced by the department describing its programs and events.	PUB3000	Retain indefinitely. Transfer one copy of each brochure to the Archives every three years.
EDPE00-06	P/E		Reports-Annual Annual report compiled by the chair's office. Includes minutes of departmental minutes and activities and events organized by the department of Health, Physical Education, and Recreation.	ADM9910	Retain in the office for three to five years and transfer hard copy to the University Archives.
EDPE00-07	P	C	Student Records-Non-Permanent-Department Includes letters of recommendation, documents regarding progress toward degree, and transfer credit evaluations. <i>Note: Destruction of records should be performed in a manner that maintains confidentiality as per FERPA.</i>	EDU1010	Retain while active, plus five years and then destroy.
EDPE00-08	P/E	H	Subject Files- Chairperson's Includes correspondence, reports, minutes, memoranda, policy and informational files on the development of the department.	ADM9910	Retain in the office for three years. Then, review for continuing administrative or historical value.*

***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).