

# 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:** Student Health Services HLSV

**Division:** College of Nursing and Health Date:

Approvals

**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
HLSV09-01	P		<b><u>Agreements/Contracts</u></b> Includes agreements with non-WSU laboratories.  <i>Note: The Student Health Services Department is licensed to store medication by the Ohio Board of Pharmacy and to perform laboratory tests by CLIA (Clinical Laboratory Improvement Amendments)</i>	LEG2000	Retain while active plus five years, then destroy, provided audited.
HLSV09-02	P		<b><u>Equipment Inventory</u></b>	ADM9900	Retain in office for three years and then review for continuing administrative value.
HLSV09-03	P		<b><u>Event Files</u></b> Files pertaining to the organization of monthly and annual events by the Students Health Services.	ADM9910	Retain in office for three years and then review for continuing administrative value.

**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**  
**RECORDS RETENTION SCHEDULE (RRS)**  
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HLSV09-04	E	V/C	<b><u>Patient Database</u></b> Proprietary database (Point and Click) for tracking visit fees, immunization information, record of each patient visit (accounting and medical history)	ADM9910	Retain updated on a quarterly basis. Retain patient visit information indefinitely. Retain accounting information for 4 years then erase.
HLSV09-05	P	C	<b><u>Personnel Files</u></b> Faculty (full-time and adjunct) and staff personnel files created by the department. 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>	PER3010	Destroy six years after termination. If subject to legal action, retain until final disposition.
HLSV09-06	P	C	<b><u>Personnel Files-Search</u></b> Includes vitae, letters, records of individuals who have applied for faculty and staff positions in the Student Health Services.	PER2010	Retain for three years, then destroy.
HLSV09-07	P		<b><u>Policies and Procedures-Department</u></b> Includes treatment guidelines developed by the Student Health Services department (for uniform treatment of medical conditions).	ADM9910	Retain in the office for five years and then review for continuing administrative value.
HLSV09-08	P	H	<b><u>Publications</u></b> Publications such as brochures, newsletters and other material produced by the Student Health Services describing its services and special events.	PUB3010	Retain in the office for three years and then transfer one copy of each issue to the University Archives.
HLSV09-09	P	H	<b><u>Reports-Annual</u></b>	PUB3010	Retain in the office for three years and then transfer one copy of each issue to the University Archives.

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HLSV09-10	P/E	C	<b><u>Student Health Insurance Records</u></b> Record of students enrolled in university or college health program. Included are: copies of insurance claims, correspondence with insurance companies, insurance providers brochures, insurance policy (of WSU insurance provider) documents.	ACC1000	Retain in the office for four years and then destroy.
HLSV09-11	P	C	<b><u>Student Health Walkout Statements</u></b> Statement of services rendered for each office visit, generated for insurance/billing purposes.	ACC1000	Retain in the office for four years and then destroy.
HLSV09-11	P/E	C	<b><u>Student Medical Records</u></b> Information includes: progress notes, health histories, lab results, x-rays, immunization records, addresses, referrals, copies of insurance records, and other medical records.  <i>Note: Medical Services are provided to students regardless of insurance status. The office was established in 1964.90.</i>	ADM9910	After inactive for two calendar years, microfilm and then destroy paper records in a confidential manner.
HLSV09-12	P/E		<b><u>Subject Files-Director's</u></b> Includes correspondence, reports, minutes, memoranda, policy and informational files as well as historical information on the development of the Student Health Services department.	ADM9910	Retain in the office for three years. Then, review for continuing administrative or historical value.*
HLSV09-13	E	H	<b><u>Web home page</u></b> Includes description of programs, activities and events of the Student Health Services Department.	ADM9901	Retain electronic format on the web until obsolete or superseded. <b>Retain a paper copy</b> of a) each version and b) each version's source code permanently in the University Archives, <b>if information exists in electronic format only.</b>

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