### Wright State University
#### RECORDS RETENTION SCHEDULE (RRS)

**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 State Policy 12220. 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

**Division:** Boonshoft School of Medicine

**Approvals**

| Dean/Director/Head |  |  |
|--------------------|  |  |
| 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.

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Medium Code</th>
<th>Value Code</th>
<th>Records Series Title and Description</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>SMFA02-01</td>
<td>P/E</td>
<td>V/H/C</td>
<td>Agreements/Contracts</td>
<td>LEG2000</td>
<td>Retain while active plus five (5) years, then review for continuing administrative or historical value.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Original records related to obligations under contracts, leases, and other agreements between the Boonshoft School of Medicine and hospitals and outside clinical agencies. Includes government contracts, grants, and other records required to be kept until government audit (One original filed in General Counsel’s Office, and one original copy filed in in BSOM Fiscal Affairs, copies at affiliated hospitals and agencies).</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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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| SMFA02-02                 | P/E         |            | Accounting Records
Includes payroll reconciliation documentation and internal purchasing transactions (i.e., operational and grant-related). | GS-01      | Retain for the current fiscal year + 1 additional year, then destroy. |
| SMFA02-03                 | P/E         |            | Budget Records
Includes duplicate files of:
   a) Overall budget- BSOM (originals filed in Controller’s Office)
   b) Budget- BSOM Departments (originals filed in Controller’s Office)
   c) Budget_ Grant Funded Projects (originals filed with Research & Sponsored Programs). | ADM9900    | Retain for the current fiscal year + 1 additional year then destroy, except for grant related budget files, which are to be retained for duration of grant + 3 additional years, then destroy. |

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04/09/18