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.

<table>
<thead>
<tr>
<th>Originating Office/Department Code:</th>
<th>ENROLLMENT PROCESSING- Office of Enrollment Processing and Financial Aid</th>
<th>ENPR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Division:</td>
<td>Enrollment Management</td>
<td>Date:</td>
</tr>
<tr>
<td>Approvals</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dean/Director/Head:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department/Unit Manager/Chair:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>University Records Manager:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Head, Special Collections and Archives:</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

<table>
<thead>
<tr>
<th>WSU Records Series Number</th>
<th>Mediu m Code¹</th>
<th>Value Code²</th>
<th>Records Series Title and Description³</th>
<th>IUC Number</th>
<th>Retention Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENPR16-01</td>
<td>P</td>
<td>C</td>
<td>Accounting Records</td>
<td>ACC1000</td>
<td>Retain while active + 1 additional year.</td>
</tr>
</tbody>
</table>

**NOTE:** All credit card billing records are to be destroyed within 18 months, as per PCI/DSS

**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)**

(continuation sheet)

<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>ENPR16-02</td>
<td>P/E</td>
<td>C</td>
<td>Application Files for Applicants Who Do Not Matriculate</td>
<td>General Schedule GS10</td>
<td>Retain for one year after application and then destroy.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Records related to applicants who do not matriculate, whether denied admission or accepted and do not enter. Includes applications for admissions/readmissions, correspondence, letters of recommendation, entrance examinations and placement test reports, advanced placement records, and transcripts. This series also includes transcripts not accompanied by application forms.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td><strong>NOTE:</strong> Files for students who apply are retained electronically. Files for students who do not apply are maintained in hard copy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENPR16-03</td>
<td>E</td>
<td>C</td>
<td>Application Files for Applicants Who Matriculate</td>
<td>EDU1010</td>
<td>Retain while active plus 1 year.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Records related to applicants who matriculated. Includes applications for admissions/readmissions, “non-routine” letters, correspondence, letters of recommendation, entrance examinations and placement test reports, advanced placement records, and academic transcripts as well as residence information.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**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)
(continuation sheet)

**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).

<table>
<thead>
<tr>
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<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>ENPR16-04</td>
<td>E</td>
<td>C</td>
<td>Application Information for Applicants Who Matriculate (SalesForce)</td>
<td>EDU1010</td>
<td>Retain while active + 5 years then delete from system [as per policy for non-permanent student records]</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Records related to applicants who matriculated. Includes information transferred from the application for admission/readmission, information on entrance examinations and placement test reports, advanced placement records, and record of transcripts received.</td>
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</tr>
<tr>
<td></td>
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<td></td>
<td><strong>NOTE:</strong> The Office of Enrollment Processing utilizes Salesforce platform (SM) to process applications, which then pushes the data to Banner as system of record</td>
<td></td>
<td></td>
</tr>
<tr>
<td>ENPR16-05</td>
<td>P/E</td>
<td>H</td>
<td>Policies and Procedures-Department</td>
<td>ADM3000</td>
<td>Retain while active + ten years. Transfer one paper copy of each version to the University Archives.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Includes standard operating procedures.</td>
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<td></td>
</tr>
<tr>
<td>ENPR16-06</td>
<td>P</td>
<td>H</td>
<td>Publications-Department</td>
<td>PUB3000</td>
<td>Retain in the office for three years and then transfer one copy of each item to the University Archives.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Brochures and other outreach materials describing enrollment procedures and processing.</td>
<td></td>
<td></td>
</tr>
</tbody>
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