

July 2018 Record Retention Schedule Edits

In addition to the edits below, the category of “Environmental Records”, which previously contained only three record series, will be combined with the category “Plant Operations and Maintenance Records”, to be titled “Plant Operations, Maintenance, and Environmental Records”. Additionally, a new record category has been created for University Health Services Records.

Record Category	Title of Series	Description	Retention Period	Rationale
Educational & Student Records	Admissions - Applicants who do not matriculate - Foreign <u>International Student Forms</u>	I-20s and <u>supporting documentation</u> . other forms. Note: Since many items included in foreign students' records are to be retained for at least five years. It is recommended that Immigration and Naturalization Service documentation also be retained five years	Active + 3	Edited Series. INS no longer exists. Edited in consultation with Office of Global Education.
Educational & Student Records	Admissions - Applicants who do matriculate - International Student Forms	1-20's and supporting documentation.	Active + 3	New Series. Added to correspond with previous category regarding student who do NOT matriculate. Added in consultation with Office of Global Education.
Education & Student Records	Student Accessibility Services Records – Documentation for students who have not completed the SAS registration process	Examples of this documentation include, but are not limited to, high school Individualized Education Plans (IEPs), letters from providers, or disability verification forms for students who have not completed the registration process.	One year from date of receipt	New Series. Added in consultation with SAS staff.

Plant Operations, Maintenance, & Environmental Records	Incident/Accident/Injury Reports	Reports made to the Office of Environmental Health and Safety regarding incidents, accidents, or injuries	5 years	New Series. Per OSHA standards as adopted by PERRP
Plant Operations, Maintenance, & Environmental Records	Employee Exposure Monitoring Records	Environmental monitoring or measuring of a toxic substance or harmful physical agent	30 years	New Series. Per OSHA standard 29 CFR 1910.1020 as adopted by PERRP
University Health Services Records	University Medical Records	Files of medical charts for students, university employees and their spouses. Includes medical histories, medical exams, progress sheets, x-rays, lab work, and related correspondence.	6 Years	Edited Series. This record series is being moved from “Human Resources Records” to the new category of “University Health Services Records”
University Health Services Records	Psychological service records	Records of psychological services received at a University facility	12 years after last date of service rendered	New Series. Retention period mandated by the Ohio Board of Psychology
University Health Services Records	Original Prescription Records	Original prescriptions maintained by the Pharmacy in University Health Services	3 years	New Series. Retention period mandated by ORC 4729.37
University Health Services Records	Super Bill Files (University specific)	Record given to each person who visits university health services. Records diagnosis, treatment, and charges or lack of charges. Used for insurance claims.	4 years	Edited Series. This record series is being moved from “Accounting and Financial Records” and “Human Resource Records” (it appeared twice in the schedule) to the new category of “University Health Services Records”