

Record Retention Schedule

Student Health and Counseling Center

*** FOOTNOTES INDICATE CURRENT DEPARTMENTAL PRACTICE ***

Category/Type of Record	MINIMUM Retention Period (in calendar years, unless otherwise indicated)
Admissions Applicants Who Do Not Enroll (Whether Accepted or Rejected)	
Medical Records	1 after application term
Building Maintenance/Management	
Key Records (records of issuance, re-issuance, return)	Permanently
Committee/Department Records	
Committee Records, Official [committees and advisory groups listed on Registrar's website at http://registrar2.wlu.edu/faculty/faccomm.htm (e.g. minutes and official correspondence -- responsibility of committee chair and/or designee)]	Until the end of the current SACS accreditation cycle (which currently runs through 2019), but not less than 5 years
Individual Committee Member Service Records (i.e. service on W&L committees)	No required minimum
General Departmental Administrative Records (e.g. budget files, capital requests, staff meeting minutes, recommendations / reports on departmental matters, general correspondence, disbursements, leave schedules, CHRON files, departmental programming, etc.)	Retain for as long as administratively useful
Record Disposition Logs	Permanently
Statistics / Records / Reports that Document Compliance with SACS Standards	Until the end of the current applicable accreditation cycle(s) SACS currently runs through 2019), but not less than 5 years
Contracts and Agreements	
Purchase Orders, Contracts, Leases, Agreements (including documents relating to a verbal agreement/contract)	5 from fulfillment of obligations or termination of contract
Repair and Service Records (departmental purchases)	Until equipment disposed of
Warranty Files (departmental purchases)	1 after warranty expiration
Written Delegation of Authority to Sign Contracts	Indefinitely

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Export Controls	
Export Control Licenses and Associated Documentation [including records related to transactions involving travel to foreign countries or other "exports" (including disclosure of certain technology/information to foreign nationals), for which a license is required.]	Consult the terms of the specific license, but not less than 3 years
Family Educational Rights and Privacy Act Data/Documents	
Student Consent to Disclosures of Personally Identifiable Information	As long as education records of the student are maintained
Student Recommendation/Reference Letter (NON-work-study)	2 from date provided
Health Center and Counseling Services Center	
Appointment Books/Logs	1 after last entry
Brochures	2 after last use or public display
Census	No required minimum; retain as long as administratively useful
¹ Counseling Services Patient Records	5 after termination of services; 6 if services provided by an M.D.
Drug Accounting Cards	2 after last entry or creation of new card
Drug Destruction Records	2 after destruction date
Drug Inventory Records	2 after inventory date
Drug Requesting, Receiving, and Dispensing Records	2 after action date
Employee First Aid, Flu Shot, and Hep. B Records	30 after separation
Medical Waste Records	3 after last regulated disposal
Monthly Logs (including logs of Alcohol/Drug Related Visits) for Internal Use	3 if alcohol/drug related; otherwise, as long as administratively useful
Nursing Logs	3 after last entry
Other Pharmaceutical Records	2 years after creation
¹ Patient Records (including medical records, health histories/immunization records, etc.)	6 from last patient encounter

¹ Currently retained for 7 years after class graduation.

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Health Center and Counseling Services Center (continued)	
Prescriptions (originals)	2 after issue/denial
Prescriptions (originals) for Schedules II through VI Drugs	2 from date of last refill
Visitor Files (non-employee and non-student)	6 from last patient encounter
Human Resources	
Conflict of Interest Disclosure Statements (staff & faculty, where applicable)	2
Job Applications, Employment Inquiries and All Other Records for NON-HIRED	
Faculty/Staff Applicants (NOT otherwise included in any search committee file)	3 from date of hiring decision
Leave Reporting Documents	5 after separation
Personnel Files for Faculty/Staff	
(e.g. supervisor records re: performance/attendance/discipline/etc. that are not otherwise kept in HR or Dean's Office)	5 from separation
References (employees, work-study students, etc.)	Later of 2 after separation or 2 from date provided
² Student Worker Personnel Files (including Federal Work-Study students)	5 after graduation or date of last attendance
Insurance and Risk Management	
³ Insurance Claims	2 after claim resolved
Waivers/Releases (e.g. Agreements of Responsible Travel, Fitness Center, etc.)	Later of 5 from date signed or 5 from completion of activity

² Currently retained for 5 years after class graduation.

³ Student Health Insurance Claim Records: The university has no obligation to retain claim records related to student health insurance, so these records need only be retained for as long as they are administratively useful. Student-Athlete Health Insurance Claim Records: The Athletics department maintains primary copies of student-athlete health insurance claim records, therefore the Student Health Center need only retain copies for as long as they are administratively useful.

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Category/Type of Record	MINIMUM Retention Period (in calendar years, unless otherwise indicated)
Intellectual Property Copyright Release and Permission Forms	3 from date of last use/publication
Litigation / Government Investigations / Agency Complaints Subpoenas and Related Authorizations for Release of Records	As long as the records they pertain to are maintained