

ECM OnBase Document Retention Form

Date: 8/6/2018

Department: AD- Admissions

Data Custodian: Nate Crozier

Life Cycle Management of documents is being implemented in OnBase. A document destruction policy will be configured for each document type and documents will be automatically purged from the system when the retention period expires. The table below includes a list of document types in the AD-Admissions Document Type Group, in OnBase. Please indicate the retention period that each document type should be retained in OnBase.

The documents will be retained in OnBase until the Retention Period expires, at which time the documents will be purged from the system. The Retention Period start date is based on the date that the document was created. Please specify the Retention Period below for each of the Document Types, sign and return this form.

Document Type Group	Document Type	Retention Period
AD- Admissions	AD- Appeal	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
	AD- Application	5 years
	AD- Application Supplement	5 years
	AD- Application Update Request	5 years
	AD- Athletic Correspondence	5 years
	AD- Bank Letter	5 years
	AD- CA Error	5 years
	AD- Change of Educational Level	5 years
	AD- Change Request (Eform)	5 years
	AD- College Report	5 years
	AD- College Transfer Evaluation	5 years
	AD- Counselor Recommendation	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
	AD- DD214 (Military Form)	5 years

AD- Decision Sheet (Eform)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD- Decision Sheet Rendered (Eform)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD- Disciplinary Information	5 years
AD- DMS Decision Sheet (ADINDEX)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD- DMS International Documents (ADINTER)	5 years
AD- Early Decision Agreement	5 years
AD- Educational Activities	5 years
AD- English Translation	5 years
AD- Equivalency Evaluation Form	5 years
AD- Essay	5 years
AD- Essay/Personal Statement	5 years
AD- Fee Waiver	5 years
AD- Final Report	5 years
AD- Financial Document	5 years
AD- General- Action Required	1 year
AD- General- No Action	1 year
AD- Honors Program Application (HPME)	5 years
AD- I-20	5 years
AD- I20 (Eform)	5 years
AD- Immigration Documentation	5 years
AD- International Sponsor Letter	5 years
AD- Interview Sheet	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation

AD- Midterm Report	5 years
AD- Midyear Report	5 years
AD- Optional Grade Report	5 years
AD- Passport	5 years
AD- Personal Statement	5 years
AD- PS Checklist Update (Eform)	5 years
AD- PS Decision Update (Eform)	5 years
AD- PS Transcript Update (Eform)	5 years
AD- Recommendation (Misc)	Fall term entry: Aug 15 prior to matriculation
	Spr term entry: Jan 5 prior to matriculation
AD- Recommendation (XFR)	Fall term entry: Aug 15 prior to matriculation
	Spr term entry: Jan 5 prior to matriculation
AD- Reply Form Admitted Student	5 years
AD- Reply Form Deferral Request	5 years
AD- Reply to Waitlist Offer	5 years
AD-Resident Alien	5 years
AD-School Profile	5 years
AD-School Report	5 years
AD-Sevis Change of Level	5 years
AD-Sevis Transfer	5 years
AD-SOB Math Description	5 years
AD-Study Abroad	5 years
AD-SYS Unidentified Items	5 years
AD-Teacher Evaluation (HS)	Fall term entry: Aug 15 prior to matriculation
	Spr term entry: Jan 5 prior to matriculation
AD-Test Score ACT/SAT (Official)	5 years

AD- Test Score ACT/SAT (Unofficial)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD- Test Score AP (Official)	5 years
AD- Test Score AP (Unofficial)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD- Test Score AP/IB/CLEP (Official)	5 years
AD- Test Score AP/IB/CLEP (Unofficial)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD- Test Score CLEP (Official)	5 years
AD- Test Score CLEP (Unofficial)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD- Test Score IB (Predicted)	5 years
AD- Test Score IB Final(Official)	5 years
AD- Test Score IB Final (Unofficial)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD-Test Score TOEFL/IELTS (Official)	5 years
AD-Test Score TOEFL/IELTS (Unofficial)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD-Transcript College (Official)	5 years
AD-Transcript College (Unofficial)	Fall term entry: Aug 15 prior to matriculation Spr term entry: Jan 5 prior to matriculation
AD-Transcript EDI	5 years

AD-Transcript EDI-Master E-Form	5 years
AD-Transcript HS (Official)	5 years
AD-Transcript HS (Unofficial)	Fall term entry: Aug 15 prior to matriculation
	Spr term entry: Jan 5 prior to matriculation
AD-Transcript HS Final (Official)	5 years
AD-Transcript HS Final (Unofficial)	Fall term entry: Aug 15 prior to matriculation
	Spr term entry: Jan 5 prior to matriculation
AD-Transfer Tracking Letter	5 years
AD-Withdrawal (Virtual Form)	5 years
AD-Withdrawal Form	5 years

Retention Business Justification: (Federal, State, Local Regulation, UM Policy #, URL, Business Needs):

Enter Retention Business Policy below. (Retention beyond 7 years requires business justification)

☒ I understand that once a document(s) is purged from OnBase it cannot be recovered and will no longer be accessible.

Data Custodian Signature: _____ **(Required)** Date: _____