Bowling Green State University

General Records Retention Schedule

Issued by BGSU Records Management, Center for Archival Collections, University Libraries

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Introduction and Overview

In compliance with [Section 149.33(B) of the Ohio Revised Code](#), Bowling Green State University, by the authority of its Board of Trustees, has established a Records Management Program under the jurisdiction of the Center for Archival Collections for assuring proper scheduling, storage and disposal of university records regardless of their format.

The Records Management Program is designed to:

- reduce costs and increase efficiency at BGSU through the systematic control of the creation, maintenance, and disposal of records (both paper and electronic);
- provide BGSU offices with a centralized records storage facility for their inactive records and to decrease the amount of office space being used to store non-current records;
- assist university offices in the proper identification, management and disposition of their active and inactive records;
- retain information for an appropriate period to meet its legal, financial, administrative, research, and historical needs;
- increase employee awareness on liability, privacy issues, regulatory compliance, cost effective information management, efficiency issues, and university history;
- effectively deliver information to internal (faculty, staff, and students) and external (general public, partner institutions, etc.) users in a timely fashion; and
- ensure the permanent preservation of historically significant materials.

Records Retention for Public Colleges and Universities in Ohio: A Manual (Inter-University Council of Ohio, May 2009 (IUC)) and its underlying matrix will be used as the basis for Bowling Green State University's Records Management Program. [Visit the Records Management website](#) for more information on the BGSU Records Management Program.

Introduction and Overview (cont.)

This General Records Retention Schedule (General Schedule) is organized by record series. A record series is a group of related records filed and/or used together as a unit and therefore evaluated as a unit for retention and disposition purposes. A records retention schedule is a comprehensive list of record series, indicating the length of time each series is to be maintained and its ultimate disposition.

Bowling Green State University's General Schedule accounts for the management and disposition of university record series that are common to many units across campus. For those units on campus that have record series that are unique to their operations, they will have a unique records retention schedule in addition to the General Schedule. All schedules, general or unique, are developed by the University Records Management Program in consultation with campus and unit representatives.

All Bowling Green State University units must familiarize themselves with this General Schedule, and have an understanding of what records—paper-based and electronic—they create and/or receive and are required to manage. Units must conduct an inventory of their records and map them to the General Schedule. If a unit identifies record types that do not map to the General Schedule, the unit should contact the University Records Manager to discuss the creation of a unique schedule. All unit unique schedules must be signed by the University Records Manager and an appropriate unit representative.

Please note, this General Schedule does not modify or supersede any retention requirements listed in individual office retention schedules, where they exist. All employees are advised to consult their office's unique retention schedule (if any) prior to making disposal decisions. University records include all information, regardless of format (paper, electronic, microform, etc.), created or received by a university office that documents the functions, policies, procedures, decisions, operations or other activities of the office. Retention periods apply to records regardless of format.

Any questions regarding this General Records Retention Schedule, or creating or revising a unit-unique schedule can be sent to the University Records Manager. Contact information is available on the Records Management website.

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How to Read the Retention Schedule

- **Record Series**: group of related records evaluated as a group for retention purposes
- **Schedule Number**: unique to this schedule; used for identifying retention listings on Certificates of Records Disposal
- **Series Description**: brief description of what is included in each record series (if no description provided it's because the record series title is sufficient explanation)
- **Minimum Retention**: shortest period of time acceptable for retention of record series. See "Retention Definitions" for additional details
- **Disposition**: what is done with the records once the minimum retention period has passed. See "Disposition of Records" for more details
- **IUC Reference**: InterUniversity Council of Ohio records retention schedule section that is the source for the BGSU record series retention period

III. Education Records¶

RECORD SERIES¤	SCHEDULE NUMBER¤	SERIES DESCRIPTION¤	MINIMUM RETENTION¤	DISPOSITION¤	IUC REFERENCE¤
Degree Information¤	GS-EDU-22-2018¤	Information and records related to the requirements for a degree program¤	ACT+10 years¤	University Archives¤	ADM3000¤
E-Learning Course Records —not used for grading¤	GS-EDU-23-2018¤	¤	Transient¤	Destroy¤	ADM9906¤
E-Learning Course Records —used for grading¤	GS-EDU-24-2018¤	Exams, assessments, chats, discussions, blog postings, etc.¤	ACT + 2 terms¤	Destroy¤	EDU1011¤
Faculty Workload Reports¤	GS-EDU-25-2018¤	Faculty Workload Reports, recording course load, teaching/admin hours/week, research activities, etc.¤	5 years¤	Destroy¤	PER6000¤
Financial Aid ¤	GS-EDU-26-2018¤	General records related to the administration of financial aid and financial aid policies. For individual students' financial aid files, See "Financial Aid Files" record groups¤	ACT+10 years¤	Destroy¤	ADM3000¤

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Retention Definitions

Record retention periods can either be a set period of time or be calculated based on an event. Below is an explanation of retention period terminology used in this General Schedule:

- **X years**: X being the number of years the record must be retained following its creation.

- **ACT +**: This retention period indicates that the final disposition clock does not start until the active period is over. *Example: Budget Files must be retained Active + 1 year. If a budget is adopted in July 2017, and superseded with a new budget in July 2018, it is not until July 2018 that the +1 year of retention begins. Thus the 2017 budget files can be destroyed in July 2019.*

- **Until Superseded**: This retention period pertains to documents that are routinely updated and therefore superseded by a new version.

- **IND** [indefinitely]: This retention period pertains to records that are required to be maintained for a significant period and possibly permanently. However, it is not yet known whether they truly need to be maintained forever, and at some point in the future their status must be reappraised.

- **Transient**: Documents including telephone messages, some e-mails, drafts and other documents, which serve to convey information of a temporary value, have a very short-lived administrative, legal and/or fiscal value and should be disposed of in an appropriate manner once that administrative, legal or fiscal use has expired. Typically, the retention is not a fixed period of time and is event driven; it may be as short as a few hours and could be as long as several days or weeks.

Disposition of Records

Part of any effective records management program is the timely disposition of obsolete records and the documentation thereof. This General Schedule currently identifies four disposition options, as follows:

Destroy: Records can be destroyed when that disposition is indicated (a) once the retention period has passed and (b) if there is not an ongoing legal hold or discovery request from General Counsel affecting the records. According to BGSU's Data Use and Protection Policy (Policy 3341-6-18) and the accompanying Data Access Summary any record not designated as "public" must be confidentially destroyed. In the case of paper records, this is most commonly done by shredding and BGSU has contracted with a shredding vendor for this purpose. Contact the University Records Manager for more information about these shredding services. Records that are designated as "public" may be destroyed simply by being put into recycling or trash bins. When in doubt as to whether a record is "public" or not, place it in a shred bin.

Whenever records are shredded/purged/destroyed, a Certificate of Records Disposal (CRD) should be filled out by the individual overseeing the records disposal. Completed CRDs should be kept in the office of origin for 10 years. A copy of the CRD should also be sent (in paper or by e-mail) to the University Records Manager. Due to the low informational value, high volume, and frequency of disposal, a CRD does not need to be completed for the routine disposal of records identified as transient or superseded in the retention schedules.

Permanent [Indefinite]: Records series that have a demonstrated legal or administrative need to a particular unit on campus to be maintained permanently within that unit or department.

Archival Review: This disposition option is for record series that have selective content that may be of value to the University Archives in documenting Bowling Green State University's history. Record series with this designation should be submitted to, or discussed with, the University Archives prior to destruction. Note that not all materials marked for Archival Review will be kept permanently. Based on the professional assessment of the reviewing archivist, materials with limited or no long-term administrative or historical value will be destroyed.

University Archives / "archive": Records series that are known to have significant value in documenting BGSU's history must be transferred to the University Archives. If the unit has determined that records should be transferred to the Archives, please follow the transfer instructions on the University Archives website.   Please contact the University Archives before the actual physical move of any records to the University Archives.

E-mail and Other Electronic Records

Advice on E-mail

In the state of Ohio, "e-mail" is not a distinct type of record with a one-size-fits-all retention period. The Ohio Electronic Records Committee notes, "Not all e-mails will necessarily be filed under the record series 'correspondence.' E-mail is not a record series and end users should review their e-mails based on the e-mail's content and use the same records series that they would use if the same information were distributed on paper."

For example, this means that e-mail records related to payroll issues should be retained for the same retention period as other payroll records, e-mails related to student grade appeals should be retained for the same retention period as student grade appeal records, etc. Organizing e-mail in folders by subject and then chronologically is an easy way to ensure that e-mail is retained for the appropriate period.

Most e-mails sent and received by users are not records that need to be retained for a long period, because they are often "transient" records or not records at all. Examples of transient records include routine meeting reminders, courtesy copies, received university listserv notices, and drafts. These can be deleted once they are no longer needed. E-mails that are not records include personal correspondence, professional organization listserv e-mails, and spam.

According to BGSU Policy 3341-6-6 on e-mail accounts, BGSU's Information Technology Services (ITS) is responsible for maintaining the technology that supports University e-mail (such as e-mail servers), however, ITS does not assume responsibility to maintain archives of public record documents for its e-mail clients. That responsibility lies with the e-mail users themselves. Section (B)(11)(b) reads "BGSU employees are responsible for maintaining records of correspondence that relates to university business. This includes electronic mail that may be subject to disclosure under Ohio's Sunshine Laws. ITS recommends that employees familiarize themselves with these laws and with BGSU's document retention policies and maintain their records accordingly." In addition, although BGSU policy allows for forwarding e-mail from a BGSU account to an outside account (i.e. Gmail or Yahoo) this is not recommended for records retention purposes. In fact, all official university business conducted by e-mail should be done through the user's BGSU account (See BGSU Policy 3341-6-21 Faculty and Staff E-mail, section (B)(3)).

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Effective E-mail Management

The key to effectively dealing with e-mail is to get rid of the non-records and any transient/transitory records that have outlived their administrative/ legal/fiscal value as quickly as possible so that only a small percentage of what is sent and/or received remains that truly needs to be managed on an on-going basis. The management of e-mail can be approached in a manner similar to how "snail mail" at work and home is processed:

- Open the e-mail and review the document's content; this may mean thoroughly reading the document, but more often than not, it is possible to judge just by a cursory look at the document, the subject line, and/or the sender.

- If it is a non-record, the message should be deleted outright, just as someone would dump "snail mail" non-records into the trash can or recycle bin.

- If the message is a transient/transitory record, then place it in a folder or sub-folder (analog or digital) that is designated for periodic review and dispose of as soon as allowable. Consider creating a "Transient/Transitory" folder or create sub-folders of record type/series or projects for the transient/transitory messages.

- If it is a record, place it in an appropriate folder by record type/series, project, retention time, or other filing schema that works for the office/organization and allows that unit to effectively manage the life cycle of the record.

Handling Other Electronic Records

Just as with e-mail, the retention of other electronic records (such as spreadsheets and databases) should be based on the type of record that the electronic item is. For example, electronic data related to student records should be retained for the same retention period as other student records; electronic records dealing with financial matters should be retained for as long as similar paper records would be kept. There are legal, fiscal and administrative implications for retaining electronic records longer than their required retention period, and they too should be managed just as diligently as paper-based records and e-mail.
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I. Accounting and Financial Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Accounting/Financial Records – General	GS-ACC-01-2018	Including accounts payable, invoices, vouchers, accounts receivable, annuity records, bad debt actions, balance sheets, budget transfers, cash books, cash disbursement journals, cash journals, receipts, register tapes, chart of accounts, cost accounting, expenditure reports, journal entries, journals, payment records and receipts, payroll change reports, checks, petty cash records, registers, requisitions, royalty payments, student accounting records, telephone billing statements, travel expenses, and workers compensation	4 years	Destroy	ACC1000
Accounts Payable	GS-ACC-02-2018	Records related to the payment of financial obligations. Includes vouchers, vendor invoices and statements; payroll and payroll deductions, contributions, and other income	4 years	Destroy	ACC1000
Accounts Receivable	GS-ACC-03-2018	Records related to the receipt of revenues. Includes vouchers, vendor invoices and statements; payroll and payroll deductions, contributions, and other income	4 years	Destroy	ACC1000
Assets and Capital Property	GS-ACC-04-2018	Purchase, sale of equipment, vehicles and assets, depreciation, maintenance, correspondence, audits of assets/property	ACT + 6 years	Destroy	ACC2000

I. Accounting and Financial Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Audits, External	GS-ACC-05-2018	Report of state or independent auditor (external) and related records	4 years	Archival Review	FIN7010
BGSU Foundation Files	GS-ACC-06-2018	Reports and records sent to and from BGSU Foundation	ACT + 7 years	Destroy	FIN3000/ Local Rule
Bids, Accepted	GS-ACC-07-2018	For purchases	ACT + 8 years	Destroy	FIN8010
Bids, Rejected	GS-ACC-08-2018	For purchases	3 years	Destroy	FIN8000
Budget Files	GS-ACC-09-2018	Budget reports and planning files. Includes supporting documentation and working papers	ACT + 1 year	Destroy	FIN2000
Deposits and Banking	GS-ACC-10-2018	Deposits and banking records	4 years	Destroy	FIN1000
Endowment Funds, Annual Reports	GS-ACC-11-2018	Annual report of funds received and expended by endowment accounts. May be in form of report to donors	ACT + 7 years	Archival Review	FIN3000/ local rules
Endowment Funds, Periodic Reports	GS-ACC-12-2018	Periodic reports of funds collected or expended by endowment accounts	ACT + 7 years	Destroy	FIN3000/ local rules
Events Files	GS-ACC-13-2018	Chronological files of negotiating fees, travel arrangements, and correspondence for visiting speakers and events	4 years	Destroy	ACC1000
Financial Reports, Annual	GS-ACC-14-2018	Annual financial/budget reports at the university, college, department/unit/area level	4 years	University Archives	FIN7000

I. Accounting and Financial Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Financial Reports, Interim	GS-ACC-15-2018	Report of financial assets, liabilities, expenditures, income and equities. A periodic report, not the year-end report	4 years	Destroy	ACC3000
Invoices	GS-ACC-16-2018	Bills for services rendered	4 years	Destroy	ACC1000
Ledgers	GS-ACC-17-2018	Departmental budget ledgers and/or journals detailing departmental account activities. Annual/final records only	6 years	Destroy	ACC1010
Packing and Shipping Records	GS-ACC-18-2018	Files of packing slips and invoices for shipments and equipment and materials received	3 years	Destroy	FIN8020
P-Card Records	GS-ACC-19-2018	Procurement card records including statements, transaction forms, and other supporting documentation	4 years	Destroy	AC1000
Purchase Orders Records	GS-ACC-20-2018	Records related to purchases or purchasing power by the department	ACT + 8 years	Destroy	FIN8010
Refunds Files	GS-ACC-21-2018	Forms indicating necessity of refund	4 years	Destroy	ACC1000
Reimbursement Requests	GS-ACC-22-2018	Requests and supporting documentation for reimbursement requests	4 years	Destroy	ACC1000
Reports Files	GS-ACC-23-2018	Periodic reports of summary budget and financial data compiled for ongoing administrative and historical purposes	4 years	Destroy	FIN7000

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I. Accounting and Financial Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Sales and Receipts Reports	GS-ACC-24-2018	Reports and receipts for sales, services, fees and fines (including cash). May include daily totals	4 years	Destroy	FIN1000
Special and Restricted Accounts Files	GS-ACC-25-2018	Chronological file of detail for special and restricted university established accounts	4 years	Destroy	ACC1000
Student Billing Records	GS-ACC-26-2018	Billing to students for tuition, services, room and board, and other expenses	4 years	Destroy	ACC1000
Student Insurance Records	GS-ACC-27-2018	Files of Student Health Insurance Registration receipts, records of declined insurance coverage, claims and investigations, and when coverage was purchased	4 years	Destroy	ACC3000
Ticket Sale Information	GS-ACC-28-2018	Reports, orders	4 years	Destroy	ACC1000
Time Keeping Records	GS-ACC-29-2018	Includes documentation of staff and student work	5 years	Destroy	PER6000
Travel Records	GS-ACC-30-2018	May include travel authorizations, travel expense reports, and payment requests	4 years	Destroy	ACC1000

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Accreditation	GS-ADM-01-2018	Accreditation reports, working papers, and site visit records for accrediting bodies. May include documents and correspondence submitted to and received from accrediting agency	10 years	Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes	ADM3020
Alumni Records	GS-ADM-02-2018	Directory and other information related to alumni (individuals and groups)	3 years	Destroy, unless necessary for continued administrative or historical purposes	ADM9910
Attendance/Participation Rosters	GS-ADM-03-2018	Attendance and participation records kept as needed for administrative purposes	1 year	Destroy	ADM9900
Audits, Internal	GS-ADM-04-2018	Report of internal audit and related records	4 years	Destroy	ADM3010

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Awards	GS-ADM-05-2018	Includes awards given to faculty, staff, students, and external community members for service, performance, fellowships, and endowed positions. Records include lists of nominations, publications, correspondence, and announcements of awards. For financial awards/scholarships given to students, see "Education Records - Awards and Scholarships"	3 years	For University- and college-level awards, transfer lists of awardees and general information about award and selection criteria to University Archives For remaining documentation and awards, destroy unless necessary for continued administrative or historical purposes	ADM9910
Ballots/Election Results	GS-ADM-05A-2018	Ballots and election results for department/college committees, department chairs, and other matters subject to elections	Ballots: 90 days unless under dispute; Results: 6 years	Destroy	Ohio SOS CBE-06 Ohio SOS CBE-63

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Blank Forms	GS-ADM-06-2018	Outdated or superseded blank forms, stationary, letterhead, etc.	Until superseded	Destroy	ADM9905
Building and Grounds Routine Maintenance and Inspections	GS-ADM-07-2018	Vehicles, Building Hours, Maps, Alarm Codes and Keys, Door Locks, Chimes, Building Counters, Assets, Housekeeping, Maintenance, Space Usage, Pest Control Invoices, Catering, Construction, Building Values, Utilities, Landscaping, Food Court Vendors, work orders, maintenance and inspections	ACT + 6 years	Destroy	ADM2020
By-laws	GS-ADM-08-2018	By-laws for any decision-making or representative body, including faculty committees, staff organizations, etc.	ACT + 10 years	University Archives	ADM3000
Certificates of Records Disposal	GS-ADM-09-2018	Records documenting the destruction of university records as per the General Records Retention Schedule or unit specific schedule	10 years	Destroy; Records Manager to receive and keep copies permanently	ADM3020

II. Administrative Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Committee, Cabinet, Working Group, and Task Force Files	GS-ADM-10-2018	May include minutes, agenda, supporting documents for review, and notes. The Chair of the Committee, unless otherwise designated, is responsible for the Record Copy and Disposition / Archiving	3 years	For university-level, and college-wide decision-making and governance/ representative-bodies, transfer final copies of agendas, minutes, and supporting materials to University Archives. Destroy all others	ADM9910
Committee, Cabinet, Working Group and Task Force meetings – audio or video recordings	GS-ADM-11-2018	Audio or video recording of proceedings of committees, cabinet, task forces and working groups, used to assist in preparation of written minutes	1 year provided information concerning the meeting is substantially transcribed to hard copy	Destroy	ADM9900

II. Administrative Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Compliance Files	GS-ADM-12-2018	General compliance files. May include workshop materials, required employee training attendance records, training certificates, compliance reports, data, etc.	10 years	Send University Archives final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes	ADM3020
Compliance Findings	GS-ADM-13-2018	Records by investigator of problems found, solutions, and disciplinary actions	10 years	Destroy	ADM3020
Correspondence - Routine and Transient	GS-ADM-14-2018	Correspondence, paper or electronic (including e-mail), routine or transient in nature, that is of limited, short-term value, e.g. appointment setting, inquiries about holdings or programs, etc.	Until Superseded	Destroy	ADM9905

II. Administrative Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Correspondence and Memoranda / General Subject Files	GS-ADM-15-2018	Correspondence and memos, paper and electronic, related to the operation, policies, procedures, major activities and development of the university/college/department	3 years	Contact University Archives concerning documentation of historically significant decisions/events. Destroy remainder unless necessary for continued administrative or historical purposes	ADM9910
Correspondence and Memoranda / General Subject Files, Upper Administration	GS-ADM-16-2018	Files of the President's Office, deans, directors, chairs and upper-level administrators including e-mail	3 years	Archival Review	ADM9910

II. Administrative Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Donor and Gift Files	GS-ADM-17-2018	Correspondence, donations, contact reports, and confidential research information. Also includes endowment / gift agreements/ academic / scholarship funds. Information about major gifts or endowments by donor, including information on the gift, any assessment or IRS forms, and information about money procured for processing	ACT + 7 years	Destroy, unless necessary for continued administrative or historical purposes	FIN3000/local rule
Duplicate Copies of Records	GS-ADM-18-2018	Copies of documents created for administrative convenience/reference only. For example, records received from the office of origin or extra copies of correspondence, reports, produced for office reference or distribution	Until no longer have administrative value	Destroy	ADM9905
Electronic Media and Forms	GS-ADM-19-2018	Office copies of computer forms, CDs, disks, tapes, cards, etc. used as preliminary input, temporary storage or output control, the results of which are produced or otherwise available in paper, online or other electronic reports or microform	Until no longer have administrative value	Destroy or erase	ADM9905
E-mail	GS-ADM-20-2018	E-mail messages and their attachments sent or received via the University's networks	Varies	Retention based on type of record the e-mail contains	

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Emeriti Files	GS-ADM-21-2018	Correspondence with emeriti faculty, recommendations and policy re: emeriti faculty by the University	ACT + 3 years	Destroy	ADM9920
Environmental Monitoring Records	GS-ADM-22-2018		5 years	Destroy	ENV1000
Equipment Maintenance, Service And Inventory Records, including motor vehicles	GS-ADM-23-2018	Equipment service and inventory records showing maintenance and repair histories and final disposition. Equipment general operating information, specifications, correspondence, worksheets, warranty information, manuals	ACT + 6 years	Destroy	ACC2000/ADM2020
Events/Special Project Files	GS-ADM-24-2018	Community and campus events, special projects, lectures, and exhibits. Includes meeting minutes, finance and planning records, agenda, and miscellaneous information	3 years	Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes	ADM9910

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
External Organizations	GS-ADM-25-2018	Correspondence or reports from civic, academic, or professional organizations that are external to BGSU. Can include information of a general nature, reports, minutes/agenda, newsletters or professional development materials	1 year	Archive final or major reports for which BGSU has contributed significant information, destroy supporting documentation unless necessary for continued administrative or historical purposes	ADM9900
Grants and Sponsored Research Files – Funded	GS-ADM-26-2018	Files related to the administration of successfully funded proposals/contracts. Generated for each new or continuing award (contracts and/or grants) from various outside sponsors/agencies (i.e. Federal, State, and Local Governments, Private Industry, etc.) Includes forms, Cost Sharing documentation, Notice of Award, and related document	Minimum of ACT + 5 years unless specified longer by granting agency	Destroy	LEG2000

II. Administrative Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Grants and Sponsored Research Files – Unfunded	GS-ADM-27-2018	Files related to unfunded grant proposals.	3 years	Destroy	ADM9910
Handbooks	GS-ADM-28-2018	Includes Student, Academic Unit, Faculty, and Staff handbooks	ACT + 10 years	University Archives	ADM3000
Incident Reports	GS-ADM-29-2018	Incident reports of an injury, accident, theft, or other similar problem. Records related to injuries or accidents sustained by BGSU employees are found under "Health/Safety/Accidents/Injuries" in the Personnel record group	ACT + 6 years	Destroy, if no legal action pending. If it is, obtain advice from general counsel regarding retention	LEG4000
Lists/indexes/summaries	GS-ADM-30-2018	Used for internal administrative convenience or information	Until no longer of administrative value	Destroy	REF0000
Mailing lists / contact database	GS-ADM-31-2018		ACT + 3 years	Destroy	ADM9920
Organization Charts	GS-ADM-32-2018	Charts depicting reporting lines in colleges/departments/offices	ACT + 10 years	University Archives	ADM3000

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Planning/Forecasting	GS-ADM-33-2018	Records related to planning/ forecasting for internal purposes. Includes five- and ten-year strategic plans, enrollment reports, program reviews, long range planning, minutes/correspondence, surveys, assessment, data, etc.	ACT + 1 year	University Archives	ADM1020
Policies, Procedures, and Rules	GS-ADM-34-2018	Policy manuals, procedures, rules, faculty and student handbooks, documentation of rulings and decisions	ACT + 10 years	University Archives	ADM3000
Program participation files (non-academic, ongoing)	GS-ADM-35-2018	Files that include registration forms/waivers, discipline forms, photo release form, medication authorization forms, and incident/accident reports. See also program participation files (one-time)	ACT + 6 years	Destroy	LEG4000
Program participation files (non-academic, one-time)	GS-ADM-36-2018	Registration and waiver forms for participants in infrequent or one-time events, etc. See also program participation files (ongoing)	3 years	Destroy	LEG9900

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Programming and Planning records	GS-ADM-37-2018	Records related to program development, planning, promotion, assessment and evaluation, recommendations, review and administration. May include white papers, reports, meeting minutes/agendas, high-level correspondence, and other records	3 years	Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes	ADM9910
Reorganization Files	GS-ADM-38-2018	Records relating to significant college or division reorganization	ACT + 10 years	Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes	ADM3000
Reports -- Annual or Major	GS-ADM-39-2018	Annual and occasional reports produced by the college, department, or unit, that cover significant achievements, goals, etc.	3 years	University Archives	ADM9910

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Research Projects, Approved	GS-ADM-40-2018	Files containing proposals, budgets, accounting information , correspondence, and reports for grant funded and non-grant funded research	Minimum of ACT + 5 years unless specified longer by granting agency	Destroy	LEG2000
Research Projects, Rejected	GS-ADM-41-2018	Files containing proposal and correspondence for grant funded and non-grant funded research	3 year	Destroy	ADM9910
Safety Records	GS-ADM-42-2018	Includes safety action plans, employee health and safety documentation. See also 'Incident Reports' and 'Policies, Procedures, and Rules' categories in this section	ACT + 6 years	Destroy	LEG4000
Scheduling	GS-ADM-43-2018	Scheduling of personnel, classes, events, and activities. Includes appointment calendars	1 year	Destroy	ADM9900
Scholarships and Grants (for students)	GS-ADM-44-2018	Correspondence, committee memberships, and Advice of Gift Remittance Forms re: scholarships administered to students. This group covers the administration of such grants, for files related to individual students receiving scholarships / grants, see "Education - Financial Aid - Scholarships and Grants"	ACT + 6 years	Destroy	ADM2050

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RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Surplus property records	GS-ADM-45-2018		Act + 6 years	Destroy	ADM2050
Surveys	GS-ADM-46-2018	Responses to administered surveys and any final reports, created for distribution, generated from survey results	3 years	Archive any final reports of surveys conducted at the college or university level, destroy all responses unless necessary for continued administrative or historical purposes	ADM9910
Training Materials	GS-ADM-47-2018	Includes any material developed or used by the department to conduct training or distributed to trainees	3 years	Destroy	ADM9910
Transient Materials	GS-ADM-48-2018	All informal and/or temporary messages (including but not limited to voice mail and e-mail), and all notes and all drafts used in the production of public records by any BGSU employee	Transient	Destroy	ADM9906

II. Administrative Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Union Files - General	GS-ADM-49-2018	Subject files held by local units of general information, copies of signed agreements, policies and procedures, correspondence and supporting documentation relating to non-grievance, non-specific personnel matters, etc. Files related to negotiating new contracts/ agreements are part of the record group "Legal - Collective Bargaining/ Contract Administration"	3 years	Destroy	ADM9910

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Academic Advising Guidelines and Policies	GS-EDU-01-2018	Guidelines and policies for academic advising services used by students	ACT + 10 years	University Archives	ADM3000
Academic Advising Records	GS-EDU-02-2018	Records related to academic advising provided to individual students	ACT + 1 year	Destroy	EDU1010
Academic Grievances	GS-EDU-03-2018	Files documenting grievances of students against faculty members	ACT + 6 years	Destroy	LEG4000
Academic Petitions	GS-EDU-04-2018	Petitions for a variety of requests, such as course audits, reinstatement, extensions, course waivers, etc.	ACT + 1 year	Destroy	EDU1010
Add-Drops	GS-EDU-05-2018	Additions or deletions of courses by students	ACT + 1 year	Destroy	EDU1010
Admissions committee and decisions records	GS-EDU-06-2018	Admissions Committee voting decisions and notes. These documents hold information for both accepted and matriculated candidates and non-accepted candidates	ACT + 1 year	Destroy	EDU1010/ EDU1100
Annual or Occasional Reports – Academic	GS-EDU-07-2018	Annual and occasional reports concerning academic activities, including teaching and research, produced by the College or Department and/or constituent units. Reports may include narratives and statistics, such as enrollment numbers. For non-academic reports see Reports – Annual/Major	ACT + 6 years	University Archives	EDU2000

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Applicants - Matriculating	GS-EDU-08-2018	Files of application materials (incl. transcripts, scores, personal statements, and correspondence) from students applying to the University who are subsequently admitted and enroll at the University	ACT + 1 year	Destroy	EDU1010
Applicants – Non-Matriculating	GS-EDU-09-2018	Files of application materials (incl. transcripts, scores, personal statements, and correspondence) from students applying to the University but who never actually enter, whether due to denial of admission or those who were accepted but choose not to enter the program	1 year	Destroy	EDU1100
Applicants - Transfer Files - Accepted Applicants	GS-EDU-10-2018	Accepted individual applications to transfer to a college or program, with any relevant correspondence, admissions information, and decisions	ACT + 1 year	Destroy	EDU1010
Applicants - Transfer Files - Non-Accepted Applicants	GS-EDU-11-2018	Denied individual applications to transfer to a college or program, with any relevant correspondence, admissions information, and decisions	ACT + 1 year	Destroy	EDU1010
Attendance records	GS-EDU-12-2018	Student attendance records	ACT + 3 years	Destroy	EDU1015

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Awards and Scholarships	GS-EDU-13-2018	Financial awards given students for educational, research, or other accomplishments. Records include lists of nominations, publications, correspondence, and announcements of awards. For non-student awards, see "Administration - Awards" record group	ACT + 6 years	Archive lists of awardees and general information about award and selection criteria, destroy supporting documentation unless necessary for continued administrative or historical purposes	EDU2000
Class Rosters	GS-EDU-14-2018	Contains names of students for each course, issued by Registrar	ACT + 3 years	Destroy	EDU1015
Co-ops, Field Experience, and Internships	GS-EDU-15-2018	Records related to student participation in co-ops, field experience placements, and internships. May include reports, learning objectives, documentation of hours worked, evaluations, and forms	IND for records that verify student experience for certification/licensure, ACT + 3 years for all other records	Retain indefinitely the records needed to verify certification/ licensure in local office. Destroy all others	EDU1000/ EDU1015

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Counselors' Logs	GS-EDU-16-2018	Counselors' logs with individual students	ACT + 1 year	Destroy	EDU1010
Course Evaluations	GS-EDU-17-2018	Student course evaluations regarding courses and faculty	5 years	Destroy	PER3010
Course Listings and Schedules	GS-EDU-18-2018	Listings/schedules of academic credit courses	ACT + 6 years	University Archives	EDU3000
Course Preparation Materials	GS-EDU-19-2018	Includes special topics course proposals, documentation on courses, syllabi, course descriptions, etc.	ACT + 3 years	Instructional materials typically belong to the faculty member. If the department holds additional records, contact University Archives for further review	ADM9910

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Course Work, Student	GS-EDU-20-2018	Student tests, examinations, quizzes, papers, projects, etc. leading to a grade and to a posting on the official student record of the registrar. Student work is not considered an official university record, and the retention period advised is an unofficial recommendation	Active + 2 terms	Instructional materials typically belong to the faculty member. If the department holds additional records, contact University Archives for further review	EDU1011
Curriculum Development Documentation	GS-EDU-21-2018	Documentation and correspondence relating to programs offered by the college, including information on curricula and equipment, recommendations and external evaluations, and information on similar programs in other institutions	ACT + 6 years IND	Archive documentation related to final program or curriculum changes. Destroy supporting documentation unless necessary for continued administrative or historical purposes	EDU3000/ EDU2000

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Degree Information	GS-EDU-22-2018	Information and records related to the requirements for a degree program	ACT + 10 years	University Archives	ADM3000
E-Learning Course Records – not used for grading	GS-EDU-23-2018		Transient	Destroy	ADM9906
E-Learning Course Records – used for grading	GS-EDU-24-2018	Exams, assessments, chats, discussions, blog postings, etc.	ACT + 2 terms	Destroy	EDU1011
Faculty Workload Reports	GS-EDU-25-2018	Faculty Workload Reports, recording course load, teaching/admin hours/week, research activities, etc.	5 years	Destroy	PER6000
Financial Aid	GS-EDU-26-2018	General records related to the administration of financial aid and financial aid policies. For individual students' financial aid files, See "Financial Aid Files" record groups	ACT + 10 years	Destroy	ADM3000
Financial Aid Files - Government Loans	GS-EDU-27-2018	Individual student files related to application, verification, deferrals, and disbursement of loans, from the US Department of Education	ACT + 3 years	Destroy	EDU2100
Financial Aid Files - Private Loans	GS-EDU-28-2018	Individual student files related to application, verification, deferrals, and disbursement of loans	ACT + 6 years	Destroy	EDU2000

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III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Financial Aid Files - Scholarships and Grants	GS-EDU-29-2018	Individual student files related to application, verification, and disbursement of scholarships and grants	ACT + 6 years	Destroy	EDU2000
Grade Changes	GS-EDU-30-2018	Forms recording appeals and/or changes of grade. Record Copy held by University Registrar	IND	Destroy local copies after ensuring permanent records are captured by Registrar's Office	EDU1000
Grades	GS-EDU-31-2018	Copies of grades from courses offered by the department taken by students. Record Copy of grades/transcripts maintained permanently by University Registrar	IND	Destroy local copies after ensuring permanent records are captured by Registrar's Office	EDU1000
Graduation Lists	GS-EDU-32-2018	Lists of students approved for graduation, sent from colleges or departments to the Registrar's Office. Record Copy of final (official) transcripts held by Registrar's Office	IND	Destroy local copies after ensuring permanent records are captured by Registrar's Office	EDU1000

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III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Name, Gender, or Residency Change Requests	GS-EDU-33-2018		ACT + 1 year	Destroy	EDU1010
Ohio Board of Regents Files	GS-EDU-34-2018	Reports, agendas, minutes for IUC, student lists, subsidy reports, management reports, etc.	ACT + 6 years	Archival Review	EDU3000
Resident Advisor/ Counsellor Reports	GS-EDU-35-2018	General residence hall reports prepared by resident counselors and advisors regarding programs, major incidents, follow-ups, staff development efforts, and concerns	ACT + 3 years	Destroy	ADM9910
Scholarships Administered by Colleges/Departments	GS-EDU-36-2018	Administrative information regarding local scholarship programs including applications, awards, recipients, etc. but not fiscal data	ACT + 6 years	Archive lists of awardees and general information about award and selection criteria, destroy supporting documentation unless necessary for continued administrative or historical purposes	EDU2000

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Statistics and Research Data	GS-EDU-37-2018	Statistics and research data on enrollment, graduation, and other institutional/college/ department statistics. May include post-graduation employment statistics. Also includes raw research data materials, data analysis, and reports	ACT + 6 years	Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes	EDU3000

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Student Academic Record – College or Department Office Files	GS-EDU-38-2018	Files maintained by individual college and department offices on students enrolled in that college or department. May include applications, grades, academic progress, and correspondence with or about student, supplementary forms, changes of grades, academic actions, etc., for students	IND for records that document student experience potentially needed for future verification (e.g., licensing, credentials, etc.) that are not held by the Registrar's Office ACT + 1 year for all other records	Retain indefinitely in office for records needed for future verification Destroy all others	EDU1000/ EDU1010
Student Academic Records - Non-Credit / Continuing Education	GS-EDU-39-2018	Records related to non-credit status students, including registration forms and associated correspondence	ACT + 3 years	Destroy	EDU1015

III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Student Disciplinary Records	GS-EDU-40-2018	Student case files for academic and non-academic behavioral issues. Documentation may cover cases related to suspension, dismissal, or probation from an academic program	IND for those students permanently dismissed, ACT + 6 years for all others	Retain indefinitely in office for those permanently dismissed, Destroy for all other outcomes	LEG4000/ EDU1000
Student Files - Housing	GS-EDU-41-2018	Includes copies of parent/student correspondence, receipts, and payments	ACT + 1 year	Destroy	EDU1010
Student Recruitment	GS-EDU-42-2018	High school recruiting, freshman letters (confirmed and offered), department head freshmen letters, school visits, testing information. See also "Applicants" record groups	ACT + 1 year	Destroy	EDU1010
Student Services - Appointment records	GS-EDU-43-2018	Record of appointments for student services such as tutoring	ACT + 1 year	Destroy	EDU1010
Student Services – Case Files (e.g. student legal services, student support services, counseling center, etc.)	GS-EDU-44-2018	Case files for individual students receiving services from various campus offices	ACT + 6 years	Destroy	EDU1010/ Local Rule

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III. Education Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Student Services - Tutoring/Coaching/ Learning Specialist reports	GS-EDU-45-2018	Reports to or from tutors/coaches/specialists on student progress	ACT + 1 year	Destroy	EDU1010
Student Services - Tutoring/Coaching/ Learning Specialist Student Files	GS-EDU-46-2018	Includes class schedule, communications, academic goals, skill evaluations, learning style inventories, documented disability reports, testing reports, document release forms, tutor session feedback forms, meeting log	ACT + 1 year	Destroy	EDU1010
Transcript Request Forms	GS-EDU-47-2018	Transcript requests received from current and former students, and campus officers	ACT + 1 year	Destroy	EDU1010
Transcripts	GS-EDU-48-2018	Transcripts of student's attendance, graduation dates, degrees, and permanent grades	IND	Maintained by Registrar	EDU1000
Work Study Files	GS-EDU-49-2018	Files of students employed via work-study program	ACT + 6 years	Destroy	EDU2000/ PER3000

IV. Legal Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Claims/Litigation	GS-LGL-01-2018	Records related to threatened or actual litigation or government investigation	ACT + 10 years	Destroy	LEG4000/ local rule
Collective Bargaining/ Contract Administration	GS-LGL-02-2018	Collective bargaining negotiations and contract administration - correspondence, drafts, final texts, contingency plans, memoranda of understanding, salary adjustments	ACT + 5 years	Archive final agreements and MOUs. Destroy all else	LEG2000
Complaint Files	GS-LGL-03-2018	Records from/concerning complainant concerning potential or actual discrimination including correspondence, EEOC Reports, Intake forms, departmental complaint forms, and summaries of actions taken	ACT + 6 years	Destroy	LEG4000
Contracts and Agreements	GS-LGL-04-2018	Includes personal services contracts, contracts with vendors for special events, clinical affiliation sites and departments, obligations under contracts for services, purchases and sales	ACT + 8 years	Destroy	LEG2000
Employee Grievances	GS-LGL-05-2018	Files of correspondence, working papers, hearing records, final disposition papers for grievances and/or hearings both pending and completed, filed by employees	ACT + 6 years	Destroy	LEG4000

IV. Legal Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Patent and Trademark Files	GS-LGL-06-2018		ACT + 6 years	University Archives	LEG7000
Property and Real Estate Files	GS-LGL-07-2018	Records re: University property, including deeds, transactions, taxes, leases, and legal descriptions	ACT + 8 years	Archival Review	LEG2000/ACC2000
Public Records Requests	GS-LGL-08-2018	Public records requests and responses to requests	3 years	Destroy	LEG9900
Waiver Forms	GS-LGL-09-2018	Waivers signed by program or event participants, guests, or parents/ guardians for minor participants	ACT + 6 years	Destroy	LEG7000

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V. Personnel Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Certifications/Licensing	GS-PER-01-2018	Certifications and licensing of faculty/staff, as required by their position duties	ACT + 3 years	Destroy	PER5010
Evaluations, Personnel	GS-PER-02-2018	Evaluation of work performance of faculty and staff (see also Course Evaluations)	5 years	Destroy	PER3010
Faculty Criteria and Procedures - RPT and Merit	GS-PER-03-2018	Policies and documentation outlining RPT and merit criteria and procedures for each College/Department	ACT + 10 years	University Archives	ADM3000
Hazardous Exposure	GS-PER-04-2018	Records documenting exposure or testing related to hazardous substances	IND	Maintain indefinitely in office	PER4030
Health/Safety/ Accidents/Injuries	GS-PER-05-2018	Records related to on-the-job accidents used for worker's compensation claims	6 years	Destroy	PER4020
Immigration and Naturalization Documents	GS-PER-06-2018	Including Form I-9 (eligibility for employment) and I-20 (visa)	ACT + 6 years	Destroy unless needed for continued administrative purposes	LEG7000
Leaves, Academic	GS-PER-07-2018	Files of materials relating to the taking of academic leaves, including salary information, approvals, supporting documentation, and related correspondence	ACT + 6 years	Destroy	PER3000

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V. Personnel Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Leaves, Medical/Personal	GS-PER-08-2018	Files of materials relating to the taking of medical or personal leaves, including salary information, approvals, supporting documentation, and related correspondence	ACT + 6 years	Destroy	PER3000
Leaves, Sick/Vacation	GS-PER-09-2018	Requests for leave	1 year	Destroy	ADM9900
Merit Files	GS-PER-10-2018	Merit salary increases for faculty and staff, including submissions, recommendations, and allocations. Record copy of final decisions should be transmitted to HR	ACT + 6 years	Destroy	PER3000
Outside Activity Reports	GS-PER-11-2018	Documentation regarding collateral employment	5 years	Destroy	PER3010
Payroll Deduction Authorizations	GS-PER-12-2018	All forms used to authorize deductions from charitable organizations, banks/credit unions, unions dues, memberships, etc.	ACT + 6 years	Destroy	PER1030
Payroll files	GS-PER-13-2018	Includes timesheets, time off from work forms, overtime and flex reports, vacation and sick leave reports, attendance records, Payroll Verification Reports, Requests for Hand-drawn Payroll Check, Payroll Check pickup sheets	5 years	Destroy	PER6000

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V. Personnel Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Personnel disciplinary records	GS-PER-14-2018	Employee disciplinary documentation, including performance improvement plans. Record copy held by HR, but may also be held locally	ACT + 6 years	Destroy	PER3000
Personnel health assessment records	GS-PER-15-2018	Records documenting employee health assessments necessary for job duties, such as respirator tests	6 years	Destroy	PER4010
Personnel Records – Human Resources and Provost copies	GS-PER-16-2018	Official copies of faculty and staff personnel files	IND	University Archives	Local rule
Personnel Records – Local Copies	GS-PER-17-2018	Employee records for faculty and staff, including RPT and evaluations, personnel assignments, changes in employment classification level	ACT + 6 years	Destroy	PER3000
Position Descriptions	GS-PER-18-2018		3 years	Destroy	PER9900
Reappointment, Promotion and Tenure Files	GS-PER-19-2018	Includes recommendations and supporting documents for all faculty and adjuncts. May include Dean's letter, Department Head recommendations, Departmental Committee Report, vitae, and letter from Provost. Tenure and promotion recommendations (approval or denial) and pertinent correspondence maintained in permanent personnel file	5 years	Destroy	PER3010

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V. Personnel Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Search and Hiring Records	GS-PER-20-2018	Includes instructions to committee, advertising materials, applications, CVs/resumes, hiring paperwork, acceptance letters, performance letters, application evaluation sheets, interview schedules, interview evaluation sheets, and letters to applicants, etc. Records for candidate that was selected should go in the employee's personnel file	3 years for those not hired ACT + 6 years for those hired	At end of search, Search Committee chair or hiring coordinator should send all final records to HR, and should hold remaining records for 3 years	PER2000/ PER3000
Student Worker/Assistant Personnel Files	GS-PER-21-2018	Student Employment applications, evaluation forms, student assistant budgets, correspondence, payroll and termination. Record copy held by HR, but may also be held locally	ACT + 6 years	Destroy	PER3000
Student Worker Timekeeping Forms and Reports	GS-PER-22-2018	Reports that students file for detailing activities performed, as well as timesheets and schedules	5 years	Destroy	PER6000
Training and Development Records	GS-PER-23-2018	Records related to required staff training and development including conference and seminar attendance, requests, registrations	ACT + 3 years	Destroy	PER5000

VI. Publication Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Advertising and Marketing	GS-PUB-01A-2018	Advertising, marketing and other promotional materials – office of origin	5 years	University Archives	MAR1000
Advertising and Marketing	GS-PUB-01B-2018	Advertising, marketing and other promotional materials created by other departments, companies, agencies or other third parties	Until no longer of administrative use	Destroy	IUC pg x
Audio and Video recordings	GS-PUB-02-2018	Audio or video recordings of University-sponsored events and performances. Does not include instructional materials. See Administrative Records for audio/visual recordings of meetings of committees, working groups, task forces, etc.	5 years or indefinite as needed	Contact University Archives concerning documentation of significant decisions/events. Destroy remainder unless necessary for continued administrative or historical purposes	PUB6000
Newspaper Clippings	GS-PUB-03-2018	Concerning activities of BGSU in general, or individual department or unit	3 years or indefinite as needed	University Archives	PUB3000

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VI. Publication Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Photographs	GS-PUB-04-2018	Concerning activities of BGSU in general, or individual department or unit	3 years or Indefinite as needed	Contact University Archives concerning documentation of significant activities/events. Destroy remainder unless necessary for continued administrative or historical purposes	PUB3000
Press Releases	GS-PUB-05-2018	Concerning activities of BGSU in general, or individual department or unit	3 years or Indefinite as needed	University Archives	PUB3000
Publications	GS-PUB-06A-2018	May also include newsletters, programs, flyers, brochures, handbooks, catalogs, manuals, and campus calendars. Includes both electronic and paper publications from office of origin	5 years or indefinite as needed	University Archives	PUB6000

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VI. Publication Records

RECORD SERIES	SCHEDULE NUMBER	SERIES DESCRIPTION	MINIMUM RETENTION	DISPOSITION	IUC REFERENCE
Publications	GS-PUB-06B-2018	By other departments, companies, agencies or other third parties	Until no longer of administrative use	Destroy	IUC pg x
Social Media	GS-PUB-07-2018	Social media channels associated with the University, and its Colleges, Departments, Programs, Divisions, etc.	3 years or Indefinite as needed	University Archives	PUB3000
Website and webpages	GS-PUB-08-2018	Official university websites or webpages that contain university records	5 years or indefinite as needed	University Archives	PUB6000