

BGSU Schedule of Records Retention

Office: Instructional Media Services

In accordance with ORC Section 149.33 and Bowling Green State University Board of Trustees schedule of Retention and Destruction for the following records is hereby established. The records covered by this schedule, upon expiration of the retention period, shall be destroyed unless otherwise specified. No record shall be destroyed that pertains to any pending claim action, litigation, or request.

Approvals:

Departmental Official: Signed Date: 08/02/2007
 Records Manager: Signed Date: 08/01/2007

Schedule Number	Record Series Title	Retention Period
119-1	Accounting Records: Includes requisitions, purchase orders	4 years
119-2	Annual Report of the originating department	3 years, transfer to Archives
119-3	Appointment Books	1 year
119-4	Budget Planning File (original maintained by BGSU Budget Office)	active + 1 year
119-5	Cash Receipt Journal	6 years
119-6	Cash Register tapes	4 years
119-7	Director's Chronological Correspondence File	5 years
119-8	Director's General Subject File: Correspondence and reports with other BGSU units and external agencies	3 years; review reports/circulars from other units/external agencies for destruction, transfer rest to Archives
119-9	Departmental Administration File: correspondence, reports, and materials documenting the activities and concerns of the Department	3 years; destroy all materials not documenting a significant action or interaction; transfer remainder to Archives

Schedule Number	Record Series Title	Retention Period
119-10	Departmental Committee Files: agendas, minutes, correspondence, reports	3 years; transfer to Archives
119-11	Financial Accounting Statement: issued monthly by the Business Office who has original record; provides record of expenses, income, and balances for each account	3 years
119-12	General Files: correspondence, reports, and publications of other departments of BGSU and external agencies	1 year
119-13	General Files, Upper Administrative: files of upper-level administrators	Destroy all materials not documenting a dean's, director's, or chair's significant action or interaction; transfer remainder to Archives
119-14	Inter-Departmental Billing	4 years
119-15	Invoices	4 years
119-16	Journals: includes Accounts Payable and Receivable and Aging of Accounts	6 years
119-17	Minutes: of committees, task forces, etc.	3 years; transfer to Archives
119-18	News Clippings: concerning the activities of a BGSU Department	3 years; transfer to Archives
119-19	Personnel Records (non-faculty)	Active + 6 years; Human Resources maintains original record
119-20	Purchase Orders	3 years
119-21	Requisitions	4 years
119-22	Search Committee Records: job posting, list of candidates, final report	3 years
119-23	Time Cards and Sheets	5 years
119-24	Travel Reimbursement for University-related travel	4 years
119-25	Correspondence, Executive: Description: Deals with significant aspects of the administration of	2 years, then appraise for historical value

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	the offices. Includes information on policy, program, fiscal or personnel matters.	
119-26	Correspondence, General: Description: Includes internal letters and memos; also correspondence from various individuals, companies, and organizations requesting information pertaining to agency and legal interpretations and other miscellaneous inquiries. This correspondence is informative, (it does not attempt to influence policy).	1 year
119-27	Correspondence, Routine: Description: Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters.	Until no longer of administrative value
119-28	Drafts: Description: Preliminary copies [text unclear] of a plan or document.	Retain until superseded, or issuance of final report or policy.

Note: This retention schedule refers to records in all formats whether in hard copy or electronic format.