

# BGSU Schedule of Records Retention

## Office: Firelands College - Office of the Dean

In accordance with ORC Section 149.33 and Bowling Green State University Board of Trustees, a 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:** Department Official: Signed Date: 09/15/2016

Records Manager: Not Signed Date: 09/15/2016

Schedule Number	Record Series Title	Retention Period
062-01	<b>Budget Files:</b> includes requisitions, purchase orders, financial accounting statements, invoices, receipts, banking records, travel expense authorizations, account transfers, budget preparation documents	4 years
062-02	<b>Dean's Chronological Correspondence File</b>	5 years
062-03	<b>Dean's General Subject File:</b> 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

Schedule Number	Record Series Title	Retention Period
062-04	<b>Committee Records:</b> Includes agendas, minutes, correspondence, reports for committees that are within the college and its departments/school	Retain 3 years, then transfer to Archives
062-05	<b>Correspondence, Executive:</b> Deals with significant aspects of the administration of the offices. Includes information on offices. Includes information on policy, program, fiscal or personnel matters. Maintained in paper or electronic format.	Retain 2 years, then appraise; transfer to Archives. Contact University Archivist.
062-06	<b>Correspondence, General:</b> 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). Maintained in paper or electronic format.	Retain 1 year, then destroy
062-07	<b>Correspondence, Routine:</b> Referral letters, requests for routine information of publications, setting appointments, etc. Most inquiries answered by standard form letters. Maintained in paper or electronic format	Retain until of no administrative use, then destroy.
062-08	<b>Course Syllabi</b>	Active + 6 years
062-09	<b>Curriculum Change requests:</b> forms proposing changes to curriculum and submitted to Provost	1 year
062-10	<b>Departmental Agendas/Minutes:</b> Meeting agendas/minutes for committees/task forces	3 years, then transfer to Archives
062-11	<b>Disciplinary/Grievance Records-Student:</b> Records maintained by faculty, departments and/or college office	Retain one year after student has graduated, then destroy in a manner protecting confidentiality. Official files maintained in Student Affairs
062-12	<b>Disciplinary/Grievance Records - Faculty/Staff:</b> Records maintained by departments and/or college office.	Active +1 year. Destroy in a manner protecting confidentiality. Official files maintained by Provost or Human Resources.

Schedule Number	Record Series Title	Retention Period
062-13	<b>Drafts:</b> Preliminary outlines of a plan, policy or report	Retain until superseded, or issuance of final report, policy or plan, then destroy.
062-14	<b>Grade Reports:</b> Faculty documentation of grade (may include tests, assignments, grade books)	Active until the end of the fifth week of the following semester, unless an appeal is in progress. Destroy in a manner protecting confidentiality.
062-15	<b>News Clippings:</b> concerning the activities of the Department.	3 years; transfer to archives
062-16	<b>Personnel Records (Administrative and Classified Staff):</b> Files can contain position descriptions, applications, letters of appointment or change, salary rate, copies of birth certificate, annual contracts, performance evaluations, PERS forms, copies of Social Security card, reclassification notices, letters of commendation or reprimand, publications, evidence of continuing education, step increases, longevity, transfers, vacation and sick leave reports, resignations, termination notices	5 years after termination, destroy in a manner protecting confidentiality. Human Resources maintains official record.
062-17	<b>Personnel Files- Faculty:</b> Original faculty contracts and addenda, promotion and tenure documentation, original transcripts, hiring documentation, resumes, letters of recommendation, correspondence, teaching schedules, tax forms, sabbatical information, evaluation forms, STRS forms, promotion and tenure decisions. Includes part-time and adjunct faculty files	5 years after termination destroy in a manner protecting confidentiality. The Provost maintains official record.
062-18	<b>Personnel Files - Students:</b> Student authorization forms, state and federal withholdings, PERS, step increases, exemptions, step increases, exemptions, reclassification forms, termination notices	Active + 6 years; destroy in a manner protecting confidentiality; Student Employment maintains official record
062-19	<b>Program Review:</b> Documentation compiled for program review process	7 years
062-20	<b>Promotion and Tenure Files:</b> faculty dossier consisting of copies of documentation of teaching, research and community service	5 years after date of decision

Schedule Number	Record Series Title	Retention Period
062-21	<b>Research Proposals, Approved</b>	5 years after project ends
062-22	<b>Research Proposals, Rejected</b>	1 year
062-23	<b>Scholarships:</b> applications for departmental awards	Active + 6 years
062-24	<b>Search Committee Records:</b> job posting, list of candidates, final report	3 years
062-25	<b>Teaching Evaluations:</b> Student evaluations of teaching. Used for reappointment, promotion, and tenure. Either the original form filled out by the student or the summary	Retain either the original form or the summary if one was created, for 5 years
062-26	<b>Operations Related, General:</b> Use of facilities applications and related documentation, parking registrations and related documentation, OSHA logs and Injury/Illness Reports, Fire Inspection Reports, etc.	4 years
062-27	<b>Departmental, General:</b> Field trip request forms and related Documentation, etc.	5 years