

BGSU Schedule of Records Retention

Office: Firelands College – Department of Humanities

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: 09/01/2009

Records Manager: Signed Date: 09/09/2009

Schedule Number	Record Series Title	Retention Period
121-01	Annual Reports	Until no longer of administrative value; transfer 1 copy to Archives
121-02	Book Orders	4 years
121-03	Budget Files: includes requisitions, purchase orders, financial accounting statements, invoices, receipts, banking records, travel expense authorizations, account transfers, budget preparation documents	4 years
121-04	Chair's Chronological Correspondence File	5 years
121-05	Chair'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
121-06	Class Roster: Contains names of students enrolled for each course; issued by Registration and Records	1 year

Schedule Number	Record Series Title	Retention Period
121-07	Committee Records: Includes agendas, minutes, correspondence, reports for committees that are within the college and its departments/ schools	Retain 3 years, then transfer to Archives
121-08	Conference Files: May include programs, planning files, evaluations, correspondence	Retain 3 years, then transfer to Archives
121-09	Correspondence, Executive: Deals with significant aspects of the administration of the offices. Includes information on offices, policy, program, fiscal or personnel matters. Maintained in paper or or electronic format.	Retain 2 years, then appraise; transfer to Archives.
121-10	Correspondence, General: 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
121-11	Correspondence, Routine: Referral letters, requests for routine information or 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
121-12	Course Change Requests: application to Provost to change, add, or drop a course	Active + 6 years
121-13	Course Syllabi	Active + 6
121-14	Curriculum Change Requests: forms proposing changes to curriculum and submitted to Provost	1 year
121-15	Departmental Administration Files: 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
121-16	Disciplinary/Grievance Records-Student: 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
121-17	Disciplinary/Grievance Records-Faculty/Staff: Records maintained by departments and/or college office.	Retain one year after date of Last activity; destroy in a manner protecting confidentiality. Official files maintained by Provost or Human Resources
121-18	Drafts: Preliminary outlines of a plan, policy or report	Retain until superseded, or issuance of final report, policy or plan, then destroy
121-19	Endowment Fund Reports: Reports of funds collected and expended for college and department endowment accounts	Retain monthly reports until annual report received, then destroy monthly reports. Retain annual report for 6 yrs after date of report, then destroy
121-20	Faculty Personnel Files	5 years after termination destroy in a manner protecting confidentiality; Provost maintains official record
121-21	Faculty Search Committee Records: Includes correspondence, position descriptions applications, resumes, and decision documentation	3 years, destroy in a manner protecting confidentiality
121-22	Grade Reports: Department copy of faculty grade report as turned in to Registration & Records	Active + 6 years, destroy in a manner protecting confidentiality
121-23	Grade Reports: Faculty documentation of grades (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
121-24	News Clippings: concerning the activities of the Department	3 years; transfer to Archives

Schedule Number	Record Series Title	Retention Period
121-25	Payroll Documentation	1 year; destroy in a manner protecting confidentiality
121-26	Personnel Records (non-faculty)	Upon termination destroy in a manner protecting confidentiality; Human Resources maintains official record
121-27	Personnel Files - Students: Student authorization forms, state and federal withholdings, PERS, step increases, exemptions, reclassification forms, termination notices	Active + 6 years; destroy in a manner protecting confidentiality. Student Employment maintains official record
121-28	Program Review: Documentation compiled for program review process	7 years
121-29	Promotion and Tenure Files: faculty dossier consisting of copies of documentation of teaching, research, and community service	5 years after date of decision
121-30	Research Proposals, Approved	5 years after project ends
121-31	Research Proposals, Rejected	1 year
121-32	Schedule, Master: semester listing of courses actually given; originals maintained permanently by Registration and Records	6 years
121-33	Scholarships: applications for departmental awards	Active + 6 years
121-34	Staff Search Committee Records: job posting, list of candidates, final report	3 years
121-35	Student Academic Records: includes admission data, grade record, curriculum changes	Active + 6 years; destroy in a manner protecting confidentiality; Registration & Records maintains official record
121-36	Students Statistics: enrollment reports, grade point studies of department	10 years; review for continuing value
121-37	Teaching Evaluations: 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