

BGSU Schedule of Records Retention

Office: Graduate College

In accordance with ORC Section 149.33 and Bowling Green State University Board of Trustees, a schedule of Retention and Disposition for the following records is hereby established. This schedule supersedes any and all previous schedules for these records. The records covered by this schedule, upon expiration of the listed retention periods, shall be destroyed unless otherwise specified. No record shall be destroyed, however, that pertains to any pending claim, action, litigation, or request.

Approvals: Department Official: Signed Date: 03/18/2019
Records Manager: Signed Date: 03/19/2019

Notes:

1. A Certificate of Records Disposal (CRD) should be prepared prior to the disposal of any records and retained by the office/department for 10 years after the date of disposal. A copy of the CRD should also be sent to the University Records Manager. Confidential paper records must be disposed of through shredding with the University's approved shredding vendor.
2. 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 all records regardless of format.
3. The University Archives will only collect those record series listed on the attached schedule as transferrable to the Archives that at its discretion have continuing historical value. Other historic items listed on the attached schedule or on the university's General Records Retention Schedule may also be collected, at the discretion of the Archives.
4. Storage of inactive/non-permanent records is available at the University Records Center.
5. Forms, the General Records Retention Schedule, and other records management information can be found at the Records Management website (available at <https://www.bgsu.edu/library/cac/services/rm.html>).

Schedule Number	Record Series Title	Minimum Retention Period	End of Retention Period Activity	Schedule Source
12-01	Degree Proposals - proposal narratives for new graduate degree programs	Until program decision is finalized	Send to University Archives	EDU 3000
12-02	Graduate Catalog - current graduate catalog course offerings and program information	Permanent	University Archives to webcrawl contents annually	EDU 3000
12-03	Graduate Faculty Status Materials - Applications and vitae of graduate faculty. Used during the promotion and tenure process. Created in response to requests for regular/provisional appointments to Graduate Faculty status or requests for adjunct status	Active + 6 years	Destroy	PER 3000
12-04	Graduate Student Academic Honesty - Graduate student case files regarding academic honesty. Documentation may cover cases related to suspension, dismissal, expulsion and all other outcomes	IND - for cases that result in suspension, dismissal, expulsion; Active + 8 years for all other outcomes	Office to retain suspension, dismissal and expulsion records permanently; destroy all other outcomes	EDU 1000
12-05	Graduate Student Appeals -Graduate student case files regarding appeals, including grade appeals, non-grade academic appeals, and assistantship-related appeals	IND - for cases that result in dismissal; Active + 8 years for all other outcomes	Office to retain dismissal records permanently; destroy all other outcomes	EDU 1000

The General Records Retention Schedule includes, but is not limited to, the following categories of records:

Academic Petitions

Accounting/Financial Records - General; Accounts Payable; Accounts Receivable; Deposits and Banking records; Invoices, etc.

Advertising and Marketing materials (office of origin and third party)

Annual or Occasional Reports (Academic)

Applicants - Matriculating

Applicants - Nonmatriculating

Awards and Scholarships

BGSU Foundation Files

Blank Forms

Budget Files

Building and Grounds - Routine Maintenance and Inspections

Committee, Cabinet, Working Groups and Task Force files

Complaint Files

Contracts and Agreements

Correspondence - Routine and Transient

Correspondence/General Subject Files (including Upper Administration)

Curriculum Development Documentation

Event Files and Event/Special Project Files

Financial Aid Files - Scholarships and Grants

Graduation Lists

Grants and Sponsored Research files (funded and unfunded)

Handbooks

Lists/Indexes/Summaries

Mailing Lists/Contact Databases

P-Card Records

Personnel Records - Local Copies

Planning/Forecasting (including program reviews)

Policies, Procedures and Rules

Publications (office of origin and third party)
Scholarships Administered by Colleges & Departments
Scholarships and Grants (for students)
Search and Hiring Records
Social Media
Statistics and Research Data
Student Academic Records - College or Department Office Files
Student Recruitment
Student Worker/Assistant Personnel Files
Surveys
Training and Development Records
Transcripts
Transient Materials (including drafts)
Work Study Files