

# BGSU Schedule of Records Retention Office: Purchasing Department

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: 07/19/2013

Records Manager: Signed

Date: 07/19/2013

Schedule Number	Record Series Title	Description	Retention Period
16-01	Bids, Accepted	For Purchases	Act + 5, destroy confidentially*
16-02	Bids, Rejected	For Purchases	3, destroy confidentially*
16-03	Contracts	Includes contracts for goods and services, leases, and property.	Act + 5, then recycle
16-04	Procurement Card (PCard)	Monthly procurement card statements and all documentation including invoices, receivers, etc. supporting each transaction on the statements.	Act + 6, destroy confidentially*
16-05	Purchase Orders	Copy of order to a supplier authorizing purchase.	Act + 5, destroy confidentially*
16-06	Purchase Requisitions	Workflow used to purchase goods and services.	4, destroy confidentially*

Schedule Number	Record Series Title	Description	Retention Period
16-07	Receipts	Verification good or service order was received by department/University	4, destroy confidentially*
16-08	Construction Documents	Drawings, payroll, receipts, specifications, addenda, notice to bidders, instruction to bidders, bid forms, contract and attachments, bond, bulletins, shop drawings, change orders, pricing guidelines, and standard conditions of the contract assignments.	Act + 6, destroy confidentially*
16-09	Vendor Information	Vendor information to include necessary 1099's and W4's.	Act + 6, destroy confidentially*
16-10	<p><b>Correspondence</b></p> <p><b>A. Routine/Transient</b> Note: Correspondence can be in physical or electronic format.</p> <p><b>B. General</b> Note: Correspondence can be in physical or electronic format.</p> <p><b>C. Executive</b> Note: Correspondence can be in physical or electronic format.</p>	<p>A. Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters</p> <p>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).</p> <p>C. Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters.</p>	<p>A. Retain until no longer of administrative value</p> <p>B. 1 year</p> <p>C. 3 years, have Archives appraise for historical value</p>
16-11	<b>Transient Documents</b>	Electronic or written records that have a very short-lived administrative, legal, or fiscal value. May include, but are not limited to: post-it notes, routing slips, telephone	Until no longer of value or superseded, then recycle

Schedule Number	Record Series Title	Description	Retention Period
		messages, e-mail or voicemail, copies, notes or drafts used in the production of public records, and surveillance videos.	

\*For record series that are destroyed confidentially, a Certificate of Records Disposal (CRD) must be filled out prior to disposal. The specific college/department must retain the CRD on file for 10 years after the date of disposal, and a copy of the CRD must be sent to the University Archives. Confidential records must be disposed of through Certified Document Destruction, Inc., and must be scheduled through the University Records Manager (372-9614).