

BGSU Schedule of Records Retention Office: Recreation and Wellness (Department of)

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: 08/27/2009

Records Manager: Signed

Date: 08/31/2009

PLEASE NOTE THAT THIS SCHEDULE APPLIES TO RECORDS IN BOTH PAPER AND/OR ELECTRONIC FORMAT

Schedule Number	Record Series Title	Retention Period
76-1	Accident/Injury/Illness Reports	Retain 6 years, pending no litigation, then destroy or retain 6 years after investigation ends, then destroy in a confidential manner
76-2	Accounts Payable/Receivable May include invoices, purchase orders, requisitions, cash register tapes, canceled checks, inter-departmental billing, ledgers, cash and charge receipts, and procurement card purchase receipts and statements	Retain 4 years, then destroy

Schedule Number	Record Series Title	Retention Period
76-3	Annual Reports	Retain 3 years; transfer to University Archives
76-4	Appointment Schedules (Wellness Connection) Paper and/or electronic list of patients seen	Retain until of no administrative use, then destroy
76-5	Budget Planning Documents and Reports	Retain 1 year after budget approved, then destroy
76-6	Class Attendance Sheets For classes taught by Department staff	Active + 1 year
76-7	Conference & Event Files For conferences and events hosted by Recreation and Wellness Department	3 years; destroy menus, invoices, receipts; transfer remainder to Archives
76-8	Correspondence – Executive Pertains to significant aspects of the administration of the office, such as policy, programs, personnel & fiscal issues. Electronic correspondence may be deleted once printed and filed	Retain a minimum of 2 years in office, then transfer to University Archives
76-9	Correspondence – General Includes internal letters and memos; also correspondence from individuals, companies, and agencies requesting information pertaining to office and other miscellaneous inquiries. Electronic correspondence may be maintained in an electronic folder or printed out & filed for 1 yr	Retain 1 year, then destroy
76-10	Correspondence – Routine Referral letters, requests for routine information usually answered by form letters, scheduling correspondence, etc. Electronic	Retain until of no administrative value, then destroy

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	correspondence may be deleted immediately when designated of no use	
76-11	Course Syllabi For courses taught by Department staff	Active + 6 years
76-12	Daily Reports/Daily Log Completed by student staff members. Contain any problems encountered during that student manager's shift	1 year
76-13	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
76-14	Departmental Committee Files Agendas, minutes, correspondence, reports	3 years; transfer to Archives
76-15	Drafts Preliminary outlines of a plan or document.	Retain until superseded, or issuance of final report or policy.
76-16	Facility Booking Reports	Retain 3 years, then destroy
76-17	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, then destroy
76-18	Grade Reports For courses taught by Department staff (Registration and Records retains original record permanently)	Active + 1 year
76-19	Internal Summary and Statistical Reports	Retain daily statistics until monthly report is complete.

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	May include facility utilization summary reports, program participation summary reports, statistical reports, scores, game results, etc.	Retain summaries 5 years, then transfer to Archives.
76-20	Medical History Forms & Waivers May include student medical history forms, employee fitness waivers, employee medical clearance forms	6 years after date of last activity, then destroy
76-21	Personnel Records (Non-Faculty) Include fee waivers and staff key documentation	Active + 6 years; Human Resources maintains original record
76-22	Printed Materials, Newsletters, News Clippings, Brochures, Recreation and Wellness Publications	Retain until of no administrative use, then transfer to Archives
76-23	Pro Shops Tally Reports	Retain 1 year, then destroy
76-24	Recruitment (Search) Committee Files	Retain 1 year after hiring date, then destroy. Hiring information maintained in Office of Human Resources. Search committee documents maintained in Office of Equity and Diversity.
76-25	Registration & Code of Conduct Forms For various short-term programs such as Group Exercise pass, semester passes, learn-to-swim classes, kids camp, group skating lessons, etc.	Active + 3 years. Input documents, such as records or forms designed and used solely for data input and control, may be destroyed once no longer of administrative use.
76-26	Rental Agreements Reservation forms and rental agreements for Dept. facilities for events, including birthday parties	4 years, then destroy

Schedule Number	Record Series Title	Retention Period
76-27	Request for Photo/Video/Filming Equipment Usage Forms Permission forms to request authorization to use equipment within Department facilities	Retain until of no administrative use.
76-28	Risk Waivers Completed by patrons purchasing a daily guest pass, use of climbing wall, classes, lessons, etc. Includes Includes agreements to participate and informed consent forms.	Retain 6 years, pending no litigation, then destroy, or retain 6 years after investigation ends, then destroy.
76-29	Student Records Files maintained in the Department on students enrolled in courses taught by department staff.	Active + 1 year
76-30	Student Employee Files	Retain 2 year after last activity; purge for reference; destroy in a confidential manner (official file kept by Student Employment)
76-31	Tests For courses taught by Department staff. Examinations of students leading to a grade and to posting on the official student record of Registrar	1 year
76-32	Time Cards and Sheets: Classified & Administrative Staff (copies) Includes Non-Student Letter of Employment time Sheets	Retain 5 years
76-33	Transient Documents Telephone messages, post-it notes, and other documents which serve to convey information of temporary	Retain until of no administrative use, then destroy

Schedule Number	Record Series Title	Retention Period
	importance in lieu of oral communication	
76-34	Travel Reimbursement Forms For University-related travel	4 years