**Bowling Green State University**

**General Records Retention Schedule**

Issued by BGSU Records Management, Center for Archival Collections, University Libraries

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# Introduction and Overview

In compliance with [Section 149.33(B) of the Ohio Revised Code](http://www.bgsu.edu/library/cac/rm/information/publicrecords.html), Bowling Green State University, by the authority of its Board of Trustees, has established a Records Management Program under the jurisdiction of the Center for Archival Collections for assuring proper scheduling, storage and disposal of university records regardless of their format.

The Records Management Program is designed to:

* reduce costs and increase efficiency at BGSU through the systematic control of the creation, maintenance, and disposal of records (both paper and electronic);
* provide BGSU offices with a centralized records storage facility for their inactive records and to decrease the amount of office space being used to store non-current records;
* assist university offices in the proper identification, management and disposition of their active and inactive records;
* retain information for an appropriate period to meet its legal, financial, administrative, research, and historical needs;
* increase employee awareness on liability, privacy issues, regulatory compliance, cost effective information management, efficiency issues, and university history;
* effectively deliver information to internal (faculty, staff, and students) and external (general public, partner institutions, etc.) users in a timely fashion; and
* ensure the permanent preservation of historically significant materials.

## *Records Retention for Public Colleges and Universities in Ohio: A Manual* (Inter-University Council of Ohio, May 2009 (IUC)) and its underlying matrix will be used as the basis for Bowling Green State University's Records Management Program. [Visit the Records Management website](http://www.bgsu.edu/library/cac/rm.html) for more information on the BGSU Records Management Program.

# Introduction and Overview (cont.)

This General Records Retention Schedule (General Schedule) is organized by record series. A record series is a group of related records filed and/or used together as a unit and therefore evaluated as a unit for retention and disposition purposes. A records retention schedule is a comprehensive list of record series, indicating the length of time each series is to be maintained and its ultimate disposition.

Bowling Green State University’s General Schedule accounts for the management and disposition of university record series that are common to many units across campus. For those units on campus that have record series that are unique to their operations, they will have a unique records retention schedule in addition to the General Schedule. All schedules, general or unique, are developed by the University Records Management Program in consultation with campus and unit representatives.

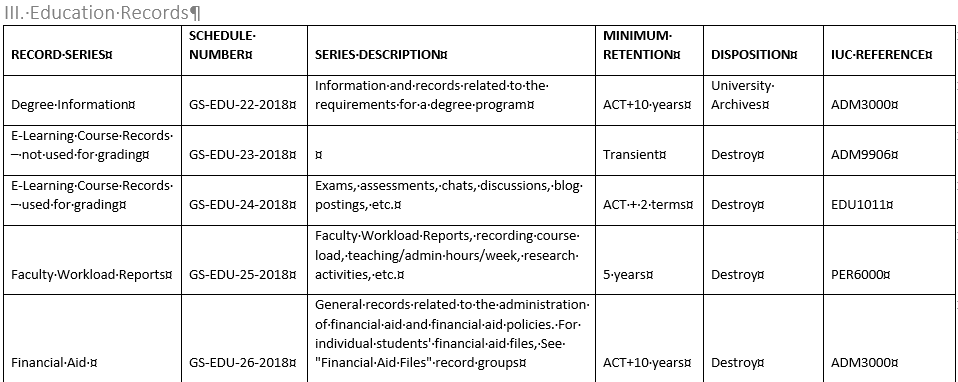
All Bowling Green State University units must familiarize themselves with this General Schedule, and have an understanding of what records—paper-based and electronic—they create and/or receive and are required to manage. Units must conduct an inventory of their records and map them to the General Schedule. If a unit identifies record types that do not map to the General Schedule, the unit should contact the University Records Manager to discuss the creation of a unique schedule. All unit unique schedules must be signed by the University Records Manager and an appropriate unit representative.

Please note, this General Schedule does not modify or supersede any retention requirements listed in individual office retention schedules, where they exist. All employees are advised to consult their office’s unique retention schedule (if any) prior to making disposal decisions. 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 records regardless of format.

Any questions regarding this General Records Retention Schedule, or creating or revising a unit-unique schedule can be sent to the University Records Manager. [Contact information](https://www.bgsu.edu/library/cac/rm/contactRM.html) is available on the Records Management website.

# How to Read the Retention Schedule

* **Record Series**: group of related records evaluated as a group for retention purposes
* **Schedule Number**: unique to this schedule; used for identifying retention listings on Certificates of Records Disposal
* **Series Description**: brief description of what is included in each record series (if no description provided it’s because the record series title is sufficient explanation)
* **Minimum Retention**: shortest period of time acceptable for retention of record series. See “Retention Definitions” for additional details
* **Disposition**: what is done with the records once the minimum retention period has passed. See “Disposition of Records” for more details
* **IUC Reference**: InterUniversity Council of Ohio records retention schedule section that is the source for the BGSU record series retention period



# Retention Definitions

Record retention periods can either be a set period of time or be calculated based on an event. Below is an explanation of retention period terminology used in this General Schedule:

* **X years**: X being the number of years the record must be retained following its creation.
* **ACT +**: This retention period indicates that the final disposition clock does not start until the active period is over. *Example: Budget Files must be retained Active + 1 year. If a budget is adopted in July 2017, and superseded with a new budget in July 2018, it is not until July 2018 that the +1 year of retention begins. Thus the 2017 budget files can be destroyed in July 2019.*
* **Until Superseded**: This retention period pertains to documents that are routinely updated and therefore superseded by a new version.
* **IND** [indefinitely]: This retention period pertains to records that are required to be maintained for a significant period and possibly permanently. However, it is not yet known whether they truly need to be maintained forever, and at some point in the future their status must be reappraised.
* **Transient**: Documents including telephone messages, some e-mails, drafts and other documents, which serve to convey information of a temporary value, have a very short-lived administrative, legal and/or fiscal value and should be disposed of in an appropriate manner once that administrative, legal or fiscal use has expired. Typically, the retention is not a fixed period of time and is event driven; it may be as short as a few hours and could be as long as several days or weeks.

# Disposition of Records

Part of any effective records management program is the timely disposition of obsolete records and the documentation thereof. This General Schedule currently identifies four disposition options, as follows:

**Destroy**: Records can be destroyed when that disposition is indicated (a) once the retention period has passed and (b) if there is not an ongoing legal hold or discovery request from General Counsel affecting the records. According to BGSU’s [Data Use and Protection Policy](http://www.bgsu.edu/content/dam/BGSU/general-counsel/documents/Data-Use-and-Protection.pdf) (Policy 3341-6-18) and the accompanying [Data Access Summary](https://www.bgsu.edu/its/infosec/datasec/data-protection.html) any record not designated as “public” must be confidentially destroyed. In the case of paper records, this is most commonly done by shredding and BGSU has contracted with a shredding vendor for this purpose. Contact the University Records Manager for more information about these shredding services. Records that are designated as “public” may be destroyed simply by being put into recycling or trash bins. When in doubt as to whether a record is “public” or not, place it in a shred bin.

Whenever records are shredded/purged/destroyed, a [Certificate of Records Disposal](https://www.bgsu.edu/content/dam/BGSU/libraries/documents/cac/CertificateOfRecordsDisposal1.pdf) (CRD) should be filled out by the individual overseeing the records disposal. Completed CRDs should be kept in the office of origin for 10 years. A copy of the CRD should also be sent (in paper or by e-mail) to the University Records Manager. Due to the low informational value, high volume, and frequency of disposal, a CRD does not need to be completed for the routine disposal of records identified as transient or superseded in the retention schedules.

**Permanent [Indefinite]**: Records series that have a demonstrated legal or administrative need to a particular unit on campus to be maintained permanently within that unit or department.

**Archival Review**: This disposition option is for record series that have selective content that may be of value to the University Archives in documenting Bowling Green State University’s history. Record series with this designation should be submitted to, or discussed with, the University Archives prior to destruction. Note that not all materials marked for Archival Review will be kept permanently. Based on the professional assessment of the reviewing archivist, materials with limited or no long-term administrative or historical value will be destroyed.

**University Archives / “archive”**: Records series that are known to have significant value in documenting BGSU’s history must be transferred to the University Archives. If the unit has determined that records should be transferred to the Archives, please [follow the transfer instructions](https://www.bgsu.edu/library/cac/ua/donations.html) on the University Archives website. Please [contact the University Archives](mailto:archive@bgsu.edu?subject=Records%20to%20Transfer%20to%20University%20Archives) before the actual physical move of any records to the University Archives.

# E-mail and Other Electronic Records

*Advice on E-mail*

In the state of Ohio, “e-mail” is not a distinct type of record with a one-size-fits-all retention period. The [Ohio Electronic Records Committee](http://ohioerc.org/?page_id=534) notes, “Not all e-mails will necessarily be filed under the record series ‘correspondence.’ E-mail is not a record series and end users should review their e-mails based on the e-mail’s content and use the same records series that they would use if the same information were distributed on paper.”

For example, this means that e-mail records related to payroll issues should be retained for the same retention period as other payroll records, e-mails related to student grade appeals should be retained for the same retention period as student grade appeal records, etc. Organizing   
e-mail in folders by subject and then chronologically is an easy way to ensure that e-mail is retained for the appropriate period.

Most e-mails sent and received by users are not records that need to be retained for a long period, because they are often “transient” records or not records at all. Examples of transient records include routine meeting reminders, courtesy copies, received university listserv notices, and drafts. These can be deleted once they are no longer needed. E-mails that are not records include personal correspondence, professional organization listserv e-mails, and spam.

According to BGSU [Policy 3341-6-6](https://www.bgsu.edu/content/dam/BGSU/general-counsel/documents/BGSU-Email-Account.pdf) on e-mail accounts, BGSU’s Information Technology Services (ITS) is responsible for maintaining the technology that supports University e-mail (such as e-mail servers), however, ITS does not assume responsibility to maintain archives of public record documents for its e-mail clients. That responsibility lies with the e-mail users themselves. Section (B)(11)(b) reads “BGSU employees are responsible for maintaining records of correspondence that relates to university business. This includes electronic mail that may be subject to disclosure under Ohio’s Sunshine Laws. ITS recommends that employees familiarize themselves with these laws and with BGSU’s document retention policies and maintain their records accordingly.” In addition, although BGSU policy allows for forwarding e-mail from a BGSU account to an outside account (i.e. Gmail or Yahoo) this is not recommended for records retention purposes. In fact, all official university business conducted by e-mail should be done through the user’s BGSU account (See BGSU [Policy 3341-6-21](https://www.bgsu.edu/content/dam/BGSU/general-counsel/documents/Faculty-and-Staff-Email.pdf) Faculty and Staff E-mail, section (B)(3)).

# *Effective E-mail Management*

The key to effectively dealing with e-mail is to get rid of the non-records and any transient/transitory records that have outlived their administrative/ legal/fiscal value as quickly as possible so that only a small percentage of what is sent and/or received remains that truly needs to be managed on an on-going basis. The management of e-mail can be approached in a manner similar to how "snail mail" at work and home is processed:

* Open the e-mail and review the document's content; this may mean thoroughly reading the document, but more often than not, it is possible to judge just by a cursory look at the document, the subject line, and/or the sender.
* If it is a non-record, the message should be deleted outright, just as someone would dump "snail mail" non-records into the trash can or recycle bin.
* If the message is a transient/transitory record, then place it in a folder or sub-folder (analog or digital) that is designated for periodic review and dispose of as soon as allowable. Consider creating a "Transient/Transitory" folder or create sub-folders of record type/series or projects for the transient/transitory messages.
* If it is a record, place it in an appropriate folder by record type/series, project, retention time, or other filing schema that works for the office/organization and allows that unit to effectively manage the life cycle of the record.

*Handling Other Electronic Records*

Just as with e-mail, the retention of other electronic records (such as spreadsheets and databases) should be based on the type of record that the electronic item is. For example, electronic data related to student records should be retained for the same retention period as other student records; electronic records dealing with financial matters should be retained for as long as similar paper records would be kept. There are legal, fiscal and administrative implications for retaining electronic records longer than their required retention period, and they too should be managed just as diligently as paper-based records and e-mail.

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| **RECORD SERIES** | **SCHEDULE NUMBER** | **SERIES DESCRIPTION** | **MINIMUM RETENTION** | **DISPOSITION** | **IUC REFERENCE** |
| --- | --- | --- | --- | --- | --- |
| Accounting/Financial Records – General | GS-ACC-01-2018 | Including accounts payable, invoices, vouchers, accounts receivable, annuity records, bad debt actions, balance sheets, budget transfers, cash books, cash disbursement journals, cash journals, receipts, register tapes, chart of accounts, cost accounting, expenditure reports, journal entries, journals, payment records and receipts, payroll change reports, checks, petty cash records, registers, requisitions, royalty payments, student accounting records, telephone billing statements, travel expenses, and workers compensation | 4 years | Destroy | ACC1000 |
| Accounts Payable | GS-ACC-02-2018 | Records related to the payment of financial obligations. Includes vouchers, vendor invoices and statements; payroll and payroll deductions, contributions, and other income | 4 years | Destroy | ACC1000 |
| Accounts Receivable | GS-ACC-03-2018 | Records related to the receipt of revenues. Includes vouchers, vendor invoices and statements; payroll and payroll deductions, contributions, and other income | 4 years | Destroy | ACC1000 |
| Assets and Capital Property | GS-ACC-04-2018 | Purchase, sale of equipment, vehicles and assets, depreciation, maintenance, correspondence, audits of assets/property | ACT + 6 years | Destroy | ACC2000 |
| Audits, External | GS-ACC-05-2018 | Report of state or independent auditor (external) and related records | 4 years | Archival Review | FIN7010 |
| BGSU Foundation Files | GS-ACC-06-2018 | Reports and records sent to and from BGSU Foundation | ACT + 7 years | Destroy | FIN3000/  Local Rule |
| Bids, Accepted | GS-ACC-07-2018 | For purchases | ACT + 8 years | Destroy | FIN8010 |
| Bids, Rejected | GS-ACC-08-2018 | For purchases | 3 years | Destroy | FIN8000 |
| Budget Files | GS-ACC-09-2018 | Budget reports and planning files. Includes supporting documentation and working papers | ACT + 1 year | Destroy | FIN2000 |
| Deposits and Banking | GS-ACC-10-2018 | Deposits and banking records | 4 years | Destroy | FIN1000 |
| Endowment Funds, Annual Reports | GS-ACC-11-2018 | Annual report of funds received and expended by endowment accounts. May be in form of report to donors | ACT + 7 years | Archival Review | FIN3000/ local rules |
| Endowment Funds, Periodic Reports | GS-ACC-12-2018 | Periodic reports of funds collected or expended by endowment accounts | ACT + 7 years | Destroy | FIN3000/  local rules |
| Events Files | GS-ACC-13-2018 | Chronological files of negotiating fees, travel arrangements, and correspondence for visiting speakers and events | 4 years | Destroy | ACC1000 |
| Financial Reports, Annual | GS-ACC-14-2018 | Annual financial/budget reports at the university, college, department/unit/area level | 4 years | University Archives | FIN7000 |
| Financial Reports, Interim | GS-ACC-15-2018 | Report of financial assets, liabilities, expenditures, income and equities. A periodic report, not the year-end report | 4 years | Destroy | ACC3000 |
| Invoices | GS-ACC-16-2018 | Bills for services rendered | 4 years | Destroy | ACC1000 |
| Ledgers | GS-ACC-17-2018 | Departmental budget ledgers and/or journals detailing departmental account activities. Annual/final records only | 6 years | Destroy | ACC1010 |
| Packing and Shipping Records | GS-ACC-18-2018 | Files of packing slips and invoices for shipments and equipment and materials received | 3 years | Destroy | FIN8020 |
| P-Card Records | GS-ACC-19-2018 | Procurement card records including statements, transaction forms, and other supporting documentation | 4 years | Destroy | AC1000 |
| Purchase Orders Records | GS-ACC-20-2018 | Records related to purchases or purchasing power by the department | ACT + 8 years | Destroy | FIN8010 |
| Refunds Files | GS-ACC-21-2018 | Forms indicating necessity of refund | 4 years | Destroy | ACC1000 |
| Reimbursement Requests | GS-ACC-22-2018 | Requests and supporting documentation for reimbursement requests | 4 years | Destroy | ACC1000 |
| Reports Files | GS-ACC-23-2018 | Periodic reports of summary budget and financial data compiled for ongoing administrative and historical purposes | 4 years | Destroy | FIN7000 |
| Sales and Receipts Reports | GS-ACC-24-2018 | Reports and receipts for sales, services, fees and fines (including cash). May include daily totals | 4 years | Destroy | FIN1000 |
| Special and Restricted Accounts Files | GS-ACC-25-2018 | Chronological file of detail for special and restricted university established accounts | 4 years | Destroy | ACC1000 |
| Student Billing Records | GS-ACC-26-2018 | Billing to students for tuition, services, room and board, and other expenses | 4 years | Destroy | ACC1000 |
| Student Insurance Records | GS-ACC-27-2018 | Files of Student Health Insurance Registration receipts, records of declined insurance coverage, claims and investigations, and when coverage was purchased | 4 years | Destroy | ACC3000 |
| Ticket Sale Information | GS-ACC-28-2018 | Reports, orders | 4 years | Destroy | ACC1000 |
| Time Keeping Records | GS-ACC-29-2018 | Includes documentation of staff and student work | 5 years | Destroy | PER6000 |
| Travel Records | GS-ACC-30-2018 | May include travel authorizations, travel expense reports, and payment requests | 4 years | Destroy | ACC1000 |

| **RECORD SERIES** | **SCHEDULE NUMBER** | **SERIES DESCRIPTION** | **MINIMUM RETENTION** | **DISPOSITION** | **IUC REFERENCE** |
| --- | --- | --- | --- | --- | --- |
| Accreditation | GS-ADM-01-2018 | Accreditation reports, working papers, and site visit records for accrediting bodies. May include documents and correspondence submitted to and received from accrediting agency | 10 years | Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes | ADM3020 |
| Alumni Records | GS-ADM-02-2018 | Directory and other information related to alumni (individuals and groups) | 3 years | Destroy, unless necessary for continued administrative or historical purposes | ADM9910 |
| Attendance/Participation Rosters | GS-ADM-03-2018 | Attendance and participation records kept as needed for administrative purposes | 1 year | Destroy | ADM9900 |
| Audits, Internal | GS-ADM-04-2018 | Report of internal audit and related records | 4 years | Destroy | ADM3010 |
| Awards | GS-ADM-05-2018 | Includes awards given to faculty, staff, students, and external community members for service, performance, fellowships, and endowed positions. Records include lists of nominations, publications, correspondence, and announcements of awards. For financial awards/scholarships given to students, see "Education Records - Awards and Scholarships" | 3 years | For University- and college-level awards, transfer lists of awardees and general information about award and selection criteria to University Archives  For remaining documentation and awards, destroy unless necessary for continued administrative or historical purposes | ADM9910 |
| Blank Forms | GS-ADM-06-2018 | Outdated or superseded blank forms, stationary, letterhead, etc. | Until superseded | Destroy | ADM9905 |
| Building and Grounds Routine Maintenance and Inspections | GS-ADM-07-2018 | Vehicles, Building Hours, Maps, Alarm Codes and Keys, Door Locks, Chimes, Building Counters, Assets, Housekeeping, Maintenance, Space Usage, Pest Control Invoices, Catering, Construction, Building Values, Utilities, Landscaping, Food Court Vendors, work orders, maintenance and inspections | ACT + 6 years | Destroy | ADM2020 |
| By-laws | GS-ADM-08-2018 | By-laws for any decision-making or representative body, including faculty committees, staff organizations, etc. | ACT + 10 years | University Archives | ADM3000 |
| Certificates of Records Disposal | GS-ADM-09-2018 | Records documenting the destruction of university records as per the General Records Retention Schedule or unit specific schedule | 10 years | Destroy; Records Manager to receive and keep copies permanently | ADM3020 |
| Committee, Cabinet, Working Group, and Task Force Files | GS-ADM-10-2018 | May include minutes, agenda, supporting documents for review, and notes. The Chair of the Committee, unless otherwise designated, is responsible for the Record Copy and Disposition / Archiving | 3 years | For university-level, and college-wide decision-making and governance/ representative-bodies, transfer final copies of agendas, minutes, and supporting materials to University Archives. Destroy all others | ADM9910 |
| Committee, Cabinet, Working Group and Task Force meetings – audio or video recordings | GS-ADM-11-2018 | Audio or video recording of proceedings of committees, cabinet, task forces and working groups, used to assist in preparation of written minutes | 1 year provided information concerning the meeting is substantially transcribed to hard copy | Destroy | ADM9900 |
| Compliance Files | GS-ADM-12-2018 | General compliance files. May include workshop materials, required employee training attendance records, training certificates, compliance reports, data, etc. | 10 years | Send University Archives final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes | ADM3020 |
| Compliance Findings | GS-ADM-13-2018 | Records by investigator of problems found, solutions, and disciplinary actions | 10 years | Destroy | ADM3020 |
| Correspondence - Routine and Transient | GS-ADM-14-2018 | Correspondence, paper or electronic (including e-mail), routine or transient in nature, that is of limited, short-term value, e.g. appointment setting, inquiries about holdings or programs, etc. | Until Superseded | Destroy | ADM9905 |
| Correspondence and Memoranda / General Subject Files | GS-ADM-15-2018 | Correspondence and memos, paper and electronic, related to the operation, policies, procedures, major activities and development of the university/college/department | 3 years | Contact University Archives concerning documentation of historically significant decisions/events. Destroy remainder unless necessary for continued administrative or historical purposes | ADM9910 |
| Correspondence and Memoranda / General Subject Files, Upper Administration | GS-ADM-16-2018 | Files of the President’s Office, deans, directors, chairs and upper-level administrators including e-mail | 3 years | Archival Review | ADM9910 |
| Donor and Gift Files | GS-ADM-17-2018 | Correspondence, donations, contact reports, and confidential research information. Also includes endowment / gift agreements/ academic / scholarship funds. Information about major gifts or endowments by donor, including information on the gift, any assessment or IRS forms, and information about money procured for processing | ACT + 7 years | Destroy, unless necessary for continued administrative or historical purposes | FIN3000/local rule |
| Duplicate Copies of Records | GS-ADM-18-2018 | Copies of documents created for administrative convenience/reference only. For example, records received from the office of origin or extra copies of correspondence, reports, produced for office reference or distribution | Until no longer have administrative value | Destroy | ADM9905 |
| Electronic Media and Forms | GS-ADM-19-2018 | Office copies of computer forms, CDs, disks, tapes, cards, etc. used as preliminary input, temporary storage or output control, the results of which are produced or otherwise available in paper, online or other electronic reports or microform | Until no longer have administrative value | Destroy or erase | ADM9905 |
| E-mail | GS-ADM-20-2018 | E-mail messages and their attachments sent or received via the University’s networks | Varies | Retention based on type of record the e-mail contains |  |
| Emeriti Files | GS-ADM-21-2018 | Correspondence with emeriti faculty, recommendations and policy re: emeriti faculty by the University | ACT + 3 years | Destroy | ADM9920 |
| Environmental Monitoring Records | GS-ADM-22-2018 |  | 5 years | Destroy | ENV1000 |
| Equipment Maintenance, Service And Inventory Records, including motor vehicles | GS-ADM-23-2018 | Equipment service and inventory records showing maintenance and repair histories and final disposition. Equipment general operating information, specifications, correspondence, worksheets, warranty information, manuals | ACT + 6 years | Destroy | ACC2000/ADM2020 |
| Events/Special Project Files | GS-ADM-24-2018 | Community and campus events, special projects, lectures, and exhibits. Includes meeting minutes, finance and planning records, agenda, and miscellaneous information | 3 years | Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes | ADM9910 |
| External Organizations | GS-ADM-25-2018 | Correspondence or reports from civic, academic, or professional organizations that are external to BGSU. Can include information of a general nature, reports, minutes/agenda, newsletters or professional development materials | 1 year | Archive final or major reports for which BGSU has contributed significant information, destroy supporting documentation unless necessary for continued administrative or historical purposes | ADM9900 |
| Grants and Sponsored Research Files – Funded | GS-ADM-26-2018 | Files related to the administration of successfully funded proposals/contracts. Generated for each new or continuing award (contracts and/or grants) from various outside sponsors/agencies (i.e. Federal, State, and Local Governments, Private Industry, etc.) Includes forms, Cost Sharing documentation, Notice of Award, and related document | Minimum of ACT + 5 years unless specified longer by granting agency | Destroy | LEG2000 |
| Grants and Sponsored Research Files – Unfunded | GS-ADM-27-2018 | Files related to unfunded grant proposals. | 3 years | Destroy | ADM9910 |
| Handbooks | GS-ADM-28-2018 | Includes Student, Academic Unit, Faculty, and Staff handbooks | ACT + 10 years | University Archives | ADM3000 |
| Incident Reports | GS-ADM-29-2018 | Incident reports of an injury, accident, theft, or other similar problem. Records related to injuries or accidents sustained by BGSU employees are found under “Health/Safety/Accidents/Injuries” in the Personnel record group | ACT + 6 years | Destroy, if no legal action pending. If it is, obtain advice from general counsel regarding retention | LEG4000 |
| Lists/indexes/summaries | GS-ADM-30-2018 | Used for internal administrative convenience or information | Until no longer of administrative value | Destroy | REF0000 |
| Mailing lists / contact database | GS-ADM-31-2018 |  | ACT + 3 years | Destroy | ADM9920 |
| Organization Charts | GS-ADM-32-2018 | Charts depicting reporting lines in colleges/departments/offices | ACT + 10 years | University Archives | ADM3000 |
| Planning/Forecasting | GS-ADM-33-2018 | Records related to planning/ forecasting for internal purposes. Includes five- and ten-year strategic plans, enrollment reports, program reviews, long range planning, minutes/correspondence, surveys, assessment, data, etc. | ACT + 1 year | University Archives | ADM1020 |
| Policies, Procedures, and Rules | GS-ADM-34-2018 | Policy manuals, procedures, rules, faculty and student handbooks, documentation of rulings and decisions | ACT + 10 years | University Archives | ADM3000 |
| Program participation files (non-academic, ongoing) | GS-ADM-35-2018 | Files that include registration forms/waivers, discipline forms, photo release form, medication authorization forms, and incident/accident reports. See also program participation files (one-time) | ACT + 6 years | Destroy | LEG4000 |
| Program participation files (non-academic, one-time) | GS-ADM-36-2018 | Registration and waiver forms for participants in infrequent or one-time events, etc. See also program participation files (ongoing) | 3 years | Destroy | LEG9900 |
| Programming and Planning records | GS-ADM-37-2018 | Records related to program development, planning, promotion, assessment and evaluation, recommendations, review and administration. May include white papers, reports, meeting minutes/agendas, high-level correspondence, and other records | 3 years | Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes | ADM9910 |
| Reorganization Files | GS-ADM-38-2018 | Records relating to significant college or division reorganization | ACT + 10 years | Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes | ADM3000 |
| Reports -- Annual or Major | GS-ADM-39-2018 | Annual and occasional reports produced by the college, department, or unit, that cover significant achievements, goals, etc. | 3 years | University Archives | ADM9910 |
| Research Projects, Approved | GS-ADM-40-2018 | Files containing proposals, budgets, accounting information , correspondence, and reports for grant funded and non-grant funded research | Minimum of ACT + 5 years unless specified longer by granting agency | Destroy | LEG2000 |
| Research Projects, Rejected | GS-ADM-41-2018 | Files containing proposal and correspondence for grant funded and non-grant funded research | 3 year | Destroy | ADM9910 |
| Safety Records | GS-ADM-42-2018 | Includes safety action plans, employee health and safety documentation. See also 'Incident Reports' and 'Policies, Procedures, and Rules’ categories in this section | ACT + 6 years | Destroy | LEG4000 |
| Scheduling | GS-ADM-43-2018 | Scheduling of personnel, classes, events, and activities. Includes appointment calendars | 1 year | Destroy | ADM9900 |
| Scholarships and Grants (for students) | GS-ADM-44-2018 | Correspondence, committee memberships, and Advice of Gift Remittance Forms re: scholarships administered to students. This group covers the administration of such grants, for files related to individual students receiving scholarships / grants, see "Education - Financial Aid - Scholarships and Grants" | ACT + 6 years | Destroy | ADM2050 |
| Surplus property records | GS-ADM-45-2018 |  | Act + 6 years | Destroy | ADM2050 |
| Surveys | GS-ADM-46-2018 | Responses to administered surveys and any final reports, created for distribution, generated from survey results | 3 years | Archive any final reports of surveys conducted at the college or university level, destroy all responses unless necessary for continued administrative or historical purposes | ADM9910 |
| Training Materials | GS-ADM-47-2018 | Includes any material developed or used by the department to conduct training or distributed to trainees | 3 years | Destroy | ADM9910 |
| Transient Materials | GS-ADM-48-2018 | All informal and/or temporary messages (including but not limited to voice mail and e-mail), and all notes and all drafts used in the production of public records by any BGSU employee | Transient | Destroy | ADM9906 |
| Union Files - General | GS-ADM-49-2018 | Subject files held by local units of general information, copies of signed agreements, policies and procedures, correspondence and supporting documentation relating to non-grievance, non-specific personnel matters, etc. Files related to negotiating new contracts/ agreements are part of the record group "Legal - Collective Bargaining/ Contract Administration" | 3 years | Destroy | ADM9910 |

| **RECORD SERIES** | **SCHEDULE NUMBER** | **SERIES DESCRIPTION** | **MINIMUM RETENTION** | **DISPOSITION** | **IUC REFERENCE** |
| --- | --- | --- | --- | --- | --- |
| Academic Advising Guidelines and Policies | GS-EDU-01-2018 | Guidelines and policies for academic advising services used by students | ACT + 10 years | University Archives | ADM3000 |
| Academic Advising Records | GS-EDU-02-2018 | Records related to academic advising provided to individual students | ACT + 1 year | Destroy | EDU1010 |
| Academic Grievances | GS-EDU-03-2018 | Files documenting grievances of students against faculty members | ACT + 6 years | Destroy | LEG4000 |
| Academic Petitions | GS-EDU-04-2018 | Petitions for a variety of requests, such as course audits, reinstatement, extensions, course waivers, etc. | ACT + 1 year | Destroy | EDU1010 |
| Add-Drops | GS-EDU-05-2018 | Additions or deletions of courses by students | ACT + 1 year | Destroy | EDU1010 |
| Admissions committee and decisions records | GS-EDU-06-2018 | Admissions Committee voting decisions and notes. These documents hold information for both accepted and matriculated candidates and non-accepted candidates | ACT + 1 year | Destroy | EDU1010/ EDU1100 |
| Annual or Occasional Reports – Academic | GS-EDU-07-2018 | Annual and occasional reports concerning academic activities, including teaching and research, produced by the College or Department and/or constituent units. Reports may include narratives and statistics, such as enrollment numbers. For non-academic reports see Reports – Annual/Major | ACT + 6 years | University Archives | EDU2000 |
| Applicants - Matriculating | GS-EDU-08-2018 | Files of application materials (incl. transcripts, scores, personal statements, and correspondence) from students applying to the University who are subsequently admitted and enroll at the University | ACT + 1 year | Destroy | EDU1010 |
| Applicants –  Non-Matriculating | GS-EDU-09-2018 | Files of application materials (incl. transcripts, scores, personal statements, and correspondence) from students applying to the University but who never actually enter, whether due to denial of admission or those who were accepted but choose not to enter the program | 1 year | Destroy | EDU1100 |
| Applicants - Transfer Files - Accepted Applicants | GS-EDU-10-2018 | Accepted individual applications to transfer to a college or program, with any relevant correspondence, admissions information, and decisions | ACT + 1 year | Destroy | EDU1010 |
| Applicants - Transfer Files - Non-Accepted Applicants | GS-EDU-11-2018 | Denied individual applications to transfer to a college or program, with any relevant correspondence, admissions information, and decisions | ACT + 1 year | Destroy | EDU1010 |
| Attendance records | GS-EDU-12-2018 | Student attendance records | ACT + 3 years | Destroy | EDU1015 |
| Awards and Scholarships | GS-EDU-13-2018 | Financial awards given students for educational, research, or other accomplishments. Records include lists of nominations, publications, correspondence, and announcements of awards. For non-student awards, see "Administration - Awards" record group | ACT + 6 years | Archive lists of awardees and general information about award and selection criteria, destroy supporting documentation unless necessary for continued administrative or historical purposes | EDU2000 |
| Class Rosters | GS-EDU-14-2018 | Contains names of students for each course, issued by Registrar | ACT + 3 years | Destroy | EDU1015 |
| Co-ops, Field Experience, and Internships | GS-EDU-15-2018 | Records related to student participation in co-ops, field experience placements, and internships. May include reports, learning objectives, documentation of hours worked, evaluations, and forms | IND for records that verify student experience for certification/licensure, ACT + 3 years for all other records | Retain indefinitely the records needed to verify certification/ licensure in local office. Destroy all others | EDU1000/ EDU1015 |
| Counselors’ Logs | GS-EDU-16-2018 | Counselors’ logs with individual students | ACT + 1 year | Destroy | EDU1010 |
| Course Evaluations | GS-EDU-17-2018 | Student course evaluations regarding courses and faculty | 5 years | Destroy | PER3010 |
| Course Listings and Schedules | GS-EDU-18-2018 | Listings/schedules of academic credit courses | ACT + 6 years | University Archives | EDU3000 |
| Course Preparation Materials | GS-EDU-19-2018 | Includes special topics course proposals, documentation on courses, syllabi, course descriptions, etc. | ACT + 3 years | Instructional materials typically belong to the faculty member. If the department holds additional records, contact University Archives for further review | ADM9910 |
| Course Work, Student | GS-EDU-20-2018 | Student tests, examinations, quizzes, papers, projects, etc. leading to a grade and to a posting on the official student record of the registrar. Student work is not considered an official university record, and the retention period advised is an unofficial recommendation | Active + 2 terms | Instructional materials typically belong to the faculty member. If the department holds additional records, contact University Archives for further review | EDU1011 |
| Curriculum Development Documentation | GS-EDU-21-2018 | Documentation and correspondence relating to programs offered by the college, including information on curricula and equipment, recommendations and external evaluations, and information on similar programs in other institutions | ACT + 6 years  IND | Archive documentation related to final program or curriculum changes. Destroy supporting documentation unless necessary for continued administrative or historical purposes | EDU3000/ EDU2000 |
| Degree Information | GS-EDU-22-2018 | Information and records related to the requirements for a degree program | ACT + 10 years | University Archives | ADM3000 |
| E-Learning Course Records – not used for grading | GS-EDU-23-2018 |  | Transient | Destroy | ADM9906 |
| E-Learning Course Records – used for grading | GS-EDU-24-2018 | Exams, assessments, chats, discussions, blog postings, etc. | ACT + 2 terms | Destroy | EDU1011 |
| Faculty Workload Reports | GS-EDU-25-2018 | Faculty Workload Reports, recording course load, teaching/admin hours/week, research activities, etc. | 5 years | Destroy | PER6000 |
| Financial Aid | GS-EDU-26-2018 | General records related to the administration of financial aid and financial aid policies. For individual students' financial aid files, See "Financial Aid Files" record groups | ACT + 10 years | Destroy | ADM3000 |
| Financial Aid Files - Government Loans | GS-EDU-27-2018 | Individual student files related to application, verification, deferrals, and disbursement of loans, from the US Department of Education | ACT + 3 years | Destroy | EDU2100 |
| Financial Aid Files - Private Loans | GS-EDU-28-2018 | Individual student files related to application, verification, deferrals, and disbursement of loans | ACT + 6 years | Destroy | EDU2000 |
| Financial Aid Files - Scholarships and Grants | GS-EDU-29-2018 | Individual student files related to application, verification, and disbursement of scholarships and grants | ACT + 6 years | Destroy | EDU2000 |
| Grade Changes | GS-EDU-30-2018 | Forms recording appeals and/or changes of grade. Record Copy held by University Registrar | IND | Destroy local copies after ensuring permanent records are captured by Registrar’s Office | EDU1000 |
| Grades | GS-EDU-31-2018 | Copies of grades from courses offered by the department taken by students. Record Copy of grades/transcripts maintained permanently by University Registrar | IND | Destroy local copies after ensuring permanent records are captured by Registrar’s Office | EDU1000 |
| Graduation Lists | GS-EDU-32-2018 | Lists of students approved for graduation, sent from colleges or departments to the Registrar’s Office. Record Copy of final (official) transcripts held by Registrar’s Office | IND | Destroy local copies after ensuring permanent records are captured by Registrar’s Office | EDU1000 |
| Name, Gender, or Residency Change Requests | GS-EDU-33-2018 |  | ACT + 1 year | Destroy | EDU1010 |
| Ohio Board of Regents Files | GS-EDU-34-2018 | Reports, agendas, minutes for IUC, student lists, subsidy reports, management reports, etc. | ACT + 6 years | Archival Review | EDU3000 |
| Resident Advisor/ Counsellor Reports | GS-EDU-35-2018 | General residence hall reports prepared by resident counselors and advisors regarding programs, major incidents, follow-ups, staff development efforts, and concerns | ACT + 3 years | Destroy | ADM9910 |
| Scholarships Administered by Colleges/Departments | GS-EDU-36-2018 | Administrative information regarding local scholarship programs including applications, awards, recipients, etc. but not fiscal data | ACT + 6 years | Archive lists of awardees and general information about award and selection criteria, destroy supporting documentation unless necessary for continued administrative or historical purposes | EDU2000 |
| Statistics and Research Data | GS-EDU-37-2018 | Statistics and research data on enrollment, graduation, and other institutional/college/ department statistics. May include post-graduation employment statistics. Also includes raw research data materials, data analysis, and reports | ACT + 6 years | Archive final or major reports, destroy supporting documentation unless necessary for continued administrative or historical purposes | EDU3000 |
| Student Academic Record – College or Department Office Files | GS-EDU-38-2018 | Files maintained by individual college and department offices on students enrolled in that college or department. May include applications, grades, academic progress, and correspondence with or about student, supplementary forms, changes of grades, academic actions, etc., for students | IND for records that document student experience potentially needed for future verification (e.g., licensing, credentials, etc.) that are not held by the Registrar’s Office  ACT + 1 year for all other records | Retain indefinitely in office for records needed for future verification  Destroy all others | EDU1000/ EDU1010 |
| Student Academic Records - Non-Credit / Continuing Education | GS-EDU-39-2018 | Records related to non-credit status students, including registration forms and associated correspondence | ACT + 3 years | Destroy | EDU1015 |
| Student Disciplinary Records | GS-EDU-40-2018 | Student case files for academic and non-academic behavioral issues. Documentation may cover cases related to suspension, dismissal, or probation from an academic program | IND for those students permanently dismissed,  ACT + 6 years for all others | Retain indefinitely in office for those permanently dismissed, Destroy for all other outcomes | LEG4000/ EDU1000 |
| Student Files - Housing | GS-EDU-41-2018 | Includes copies of parent/student correspondence, receipts, and payments | ACT + 1 year | Destroy | EDU1010 |
| Student Recruitment | GS-EDU-42-2018 | High school recruiting, freshman letters (confirmed and offered), department head freshmen letters, school visits, testing information. See also "Applicants" record groups | ACT + 1 year | Destroy | EDU1010 |
| Student Services - Appointment records | GS-EDU-43-2018 | Record of appointments for student services such as tutoring | ACT + 1 year | Destroy | EDU1010 |
| Student Services – Case Files (e.g. student legal services, student support services, counseling center, etc.) | GS-EDU-44-2018 | Case files for individual students receiving services from various campus offices | ACT + 6 years | Destroy | EDU1010/ Local Rule |
| Student Services - Tutoring/Coaching/ Learning Specialist reports | GS-EDU-45-2018 | Reports to or from tutors/coaches/specialists on student progress | ACT + 1 year | Destroy | EDU1010 |
| Student Services - Tutoring/Coaching/ Learning Specialist Student Files | GS-EDU-46-2018 | Includes class schedule, communications, academic goals, skill evaluations, learning style inventories, documented disability reports, testing reports, document release forms, tutor session feedback forms, meeting log | ACT + 1 year | Destroy | EDU1010 |
| Transcript Request Forms | GS-EDU-47-2018 | Transcript requests received from current and former students, and campus officers | ACT + 1 year | Destroy | EDU1010 |
| Transcripts | GS-EDU-48-2018 | Transcripts of student's attendance, graduation dates, degrees, and permanent grades | IND | Maintained by Registrar | EDU1000 |
| Work Study Files | GS-EDU-49-2018 | Files of students employed via work-study program | ACT + 6 years | Destroy | EDU2000/ PER3000 |

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| --- | --- | --- | --- | --- | --- |
| Claims/Litigation | GS-LGL-01-2018 | Records related to threatened or actual litigation or government investigation | ACT + 10 years | Destroy | LEG4000/  local rule |
| Collective Bargaining/ Contract Administration | GS-LGL-02-2018 | Collective bargaining negotiations and contract administration - correspondence, drafts, final texts, contingency plans, memoranda of understanding, salary adjustments | ACT + 5 years | Archive final agreements and MOUs. Destroy all else | LEG2000 |
| Complaint Files | GS-LGL-03-2018 | Records from/concerning complainant concerning potential or actual discrimination including correspondence, EEOC Reports, Intake forms, departmental complaint forms, and summaries of actions taken | ACT + 6 years | Destroy | LEG4000 |
| Contracts and Agreements | GS-LGL-04-2018 | Includes personal services contracts, contracts with vendors for special events, clinical affiliation sites and departments, obligations under contracts for services, purchases and sales | ACT + 8 years | Destroy | LEG2000 |
| Employee Grievances | GS-LGL-05-2018 | Files of correspondence, working papers, hearing records, final disposition papers for grievances and/or hearings both pending and completed, filed by employees | ACT + 6 years | Destroy | LEG4000 |
| Patent and Trademark Files | GS-LGL-06-2018 |  | ACT + 6 years | University Archives | LEG7000 |
| Property and Real Estate Files | GS-LGL-07-2018 | Records re: University property, including deeds, transactions, taxes, leases, and legal descriptions | ACT + 8 years | Archival Review | LEG2000/ACC2000 |
| Public Records Requests | GS-LGL-08-2018 | Public records requests and responses to requests | 3 years | Destroy | LEG9900 |
| Waiver Forms | GS-LGL-09-2018 | Waivers signed by program or event participants, guests, or parents/ guardians for minor participants | ACT + 6 years | Destroy | LEG7000 |

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| --- | --- | --- | --- | --- | --- |
| Certifications/Licensing | GS-PER-01-2018 | Certifications and licensing of faculty/staff, as required by their position duties | ACT + 3 years | Destroy | PER5010 |
| Evaluations, Personnel | GS-PER-02-2018 | Evaluation of work performance of faculty and staff (see also Course Evaluations) | 5 years | Destroy | PER3010 |
| Faculty Criteria and Procedures - RPT and Merit | GS-PER-03-2018 | Policies and documentation outlining RPT and merit criteria and procedures for each College/Department | ACT + 10 years | University Archives | ADM3000 |
| Hazardous Exposure | GS-PER-04-2018 | Records documenting exposure or testing related to hazardous substances | IND | Maintain indefinitely in office | PER4030 |
| Health/Safety/ Accidents/Injuries | GS-PER-05-2018 | Records related to on-the-job accidents used for worker's compensation claims | 6 years | Destroy | PER4020 |
| Immigration and Naturalization Documents | GS-PER-06-2018 | Including Form I-9 (eligibility for employment) and I-20 (visa) | ACT + 6 years | Destroy unless needed for continued administrative purposes | LEG7000 |
| Leaves, Academic | GS-PER-07-2018 | Files of materials relating to the taking of academic leaves, including salary information, approvals, supporting documentation, and related correspondence | ACT + 6 years | Destroy | PER3000 |
| Leaves, Medical/Personal | GS-PER-08-2018 | Files of materials relating to the taking of medical or personal leaves, including salary information, approvals, supporting documentation, and related correspondence | ACT + 6 years | Destroy | PER3000 |
| Leaves, Sick/Vacation | GS-PER-09-2018 | Requests for leave | 1 year | Destroy | ADM9900 |
| Merit Files | GS-PER-10-2018 | Merit salary increases for faculty and staff, including submissions, recommendations, and allocations. Record copy of final decisions should be transmitted to HR | ACT + 6 years | Destroy | PER3000 |
| Outside Activity Reports | GS-PER-11-2018 | Documentation regarding collateral employment | 5 years | Destroy | PER3010 |
| Payroll Deduction Authorizations | GS-PER-12-2018 | All forms used to authorize deductions from charitable organizations, banks/credit unions, unions dues, memberships, etc. | ACT + 6 years | Destroy | PER1030 |
| Payroll files | GS-PER-13-2018 | Includes timesheets, time off from work forms, overtime and flex reports, vacation and sick leave reports, attendance records, Payroll Verification Reports, Requests for Hand-drawn Payroll Check, Payroll Check pickup sheets | 5 years | Destroy | PER6000 |
| Personnel disciplinary records | GS-PER-14-2018 | Employee disciplinary documentation, including performance improvement plans. Record copy held by HR, but may also be held locally | ACT + 6 years | Destroy | PER3000 |
| Personnel health assessment records | GS-PER-15-2018 | Records documenting employee health assessments necessary for job duties, such as respirator tests | 6 years | Destroy | PER4010 |
| Personnel Records – Human Resources and Provost copies | GS-PER-16-2018 | Official copies of faculty and staff personnel files | IND | University Archives | Local rule |
| Personnel Records – Local Copies | GS-PER-17-2018 | Employee records for faculty and staff, including RPT and evaluations, personnel assignments, changes in employment classification level | ACT + 6 years | Destroy | PER3000 |
| Position Descriptions | GS-PER-18-2018 |  | 3 years | Destroy | PER9900 |
| Reappointment, Promotion and Tenure Files | GS-PER-19-2018 | Includes recommendations and supporting documents for all faculty and adjuncts. May include Dean's letter, Department Head recommendations, Departmental Committee Report, vitae, and letter from Provost. Tenure and promotion recommendations (approval or denial) and pertinent correspondence maintained in permanent personnel file | 5 years | Destroy | PER3010 |
| Search and Hiring Records | GS-PER-20-2018 | Includes instructions to committee, advertising materials, applications, CVs/resumes, hiring paperwork, acceptance letters, performance letters, application evaluation sheets, interview schedules, interview evaluation sheets, and letters to applicants, etc. Records for candidate that was selected should go in the employee's personnel file | 3 years for those not hired  ACT + 6 years for those hired | At end of search, Search Committee chair or hiring coordinator should send all final records to HR, and should hold remaining records for 3 years | PER2000/ PER3000 |
| Student Worker/Assistant Personnel Files | GS-PER-21-2018 | Student Employment applications, evaluation forms, student assistant budgets, correspondence, payroll and termination. Record copy held by HR, but may also be held locally | ACT + 6 years | Destroy | PER3000 |
| Student Worker Timekeeping Forms  and Reports | GS-PER-22-2018 | Reports that students file for detailing activities performed, as well as timesheets and schedules | 5 years | Destroy | PER6000 |
| Training and Development Records | GS-PER-23-2018 | Records related to required staff training and development including conference and seminar attendance, requests, registrations | ACT + 3 years | Destroy | PER5000 |

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| --- | --- | --- | --- | --- | --- |
| Advertising and Marketing | GS-PUB-01A-2018 | Advertising, marketing and other promotional materials – office of origin | 5 years | University Archives | MAR1000 |
| Advertising and Marketing | GS-PUB-01B-2018 | Advertising, marketing and other promotional materials created by other departments, companies, agencies or other third parties | Until no longer of administrative use | Destroy | IUC pg x |
| Audio and Video recordings | GS-PUB-02-2018 | Audio or video recordings of University-sponsored events and performances. Does not include instructional materials. See Administrative Records for audio/visual recordings of meetings of committees, working groups, task forces, etc. | 5 years or indefinite as needed | Contact University Archives concerning documentation of significant decisions/events. Destroy remainder unless necessary for continued administrative or historical purposes | PUB6000 |
| Newspaper Clippings | GS-PUB-03-2018 | Concerning activities of BGSU in general, or individual department or unit | 3 years or indefinite as needed | University Archives | PUB3000 |
| Photographs | GS-PUB-04-2018 | Concerning activities of BGSU in general, or individual department or unit | 3 years or Indefinite as needed | Contact University Archives concerning documentation of significant activities/events. Destroy remainder unless necessary for continued administrative or historical purposes | PUB3000 |
| Press Releases | GS-PUB-05-2018 | Concerning activities of BGSU in general, or individual department or unit | 3 years or Indefinite as needed | University Archives | PUB3000 |
| Publications | GS-PUB-06A-2018 | May also include newsletters, programs, flyers, brochures, handbooks, catalogs, manuals, and campus calendars. Includes both electronic and paper publications from office of origin | 5 years or indefinite as needed | University Archives | PUB6000 |
| Publications | GS-PUB-06B-2018 | By other departments, companies, agencies or other third parties | Until no longer of administrative use | Destroy | IUC pg x |
| Social Media | GS-PUB-07-2018 | Social media channels associated with the University, and its Colleges, Departments, Programs, Divisions, etc. | 3 years or Indefinite as needed | University Archives | PUB3000 |
| Website and webpages | GS-PUB-08-2018 | Official university websites or webpages that contain university records | 5 years or indefinite as needed | University Archives | PUB6000 |