

BGSU Schedule of Records Retention

Office: Admissions

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: 09/08/2005

Records Manager: Signed

Date: 09/12/2005

Schedule Number	Record Series Title	Retention Period
2-1	Acceptance Letters and Relevant Admissions Correspondence for Applicants Who Do Matriculate: Student-specific correspondence relating to admission and enrollment at the institution.	7 years
2-2	Acceptance Letters for Applicants Who Do Not Matriculate: Letters notifying students of acceptance or non-acceptance to the institution	1 year
2-3	Accounts Payable Records: Amounts owed on open account for goods or services received	4 years
2-4	Accounts Receivable Records: Amounts due from others on open accounts as a result of providing services	4 years
2-5	Admissions Correspondence for Applicants Who Do Matriculate: Student-specific correspondence and applications for admission and enrollment at BGSU	7 years
2-6	Advertising/Promotional Materials	5 years; transfer to Archives
2-7	Annual Report (of originating department)	3 years; transfer 1 copy to Archives

Schedule Number	Record Series Title	Retention Period
2-8	Applications for Admission or Readmission for Applicants Who Do Matriculate: Forms requesting admission or readmission to the institution.	7 years
2-9	Applications for Admission or Readmission for Applicants Who Do Not Matriculate: Forms requesting admission or readmission to the institution	1 year
2-10	Budget Printout—Monthly: Periodic reports of expenditures, usually by department or account	4 years
2-11	Budget Planning Documents: Budget requests, including program plans for coming year, usually by cost center	Active + 1 year
2-12	Budget Transfers: Billing between departments	4 years
2-13	Correspondence for Applicants Who Do Not Matriculate	1 year
2-14	Correspondence, Executive: Deals with significant aspects of the administration of the office. Includes information on policy, program, fiscal or personnel matters.	2 years, then appraise for historic value
2-15	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).	1 year
2-16	Correspondence, Routine: Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters.	Until no longer of administrative value
2-17	Drafts: Preliminary outlines of a plan or document.	Until superseded, or issuance of final report or policy
2-18	Entrance Exam & Placement Test Reports (ACT, CEEB) for Applicants Who Do Not Matriculate: Standardized test scores related to admission to the institution and placement test scores.	1 year
2-19	Invoices: Bills for goods shipped or services rendered. Usually matched to purchase orders and delivery slips and attached to voucher for payment.	4 years

Schedule Number	Record Series Title	Retention Period
2-20	Letters of Recommendation for Applicants Who Do Matriculate: Letters of reference supporting application to the institution.	7 years
2-21	Letters of Recommendation for Applicants Who Do Not Matriculate: Letters of reference supporting application to the institution.	1 year
2-22	Maintenance Contracts: Includes copies of contracts, service histories and work orders.	Active + 6 years
2-23	Minutes: Meeting minutes of committees, task Forces, etc.	3 years, transfer to Archives
2-24	Personalized Recruitment Materials for Applicants Who Do Matriculate: Student-specific letters related to encouraging potential student to attend the institution.	3 years; VA regulations require that all recruitment materials be retained 3 years
2-25	Personalized Recruitment Materials for Applicants Who Do Not Matriculate: Student-specific letters related to encouraging potential student to attend the institution.	3 years; VA regulations require that all recruitment materials be retained 3 years
2-26	Student Waivers for Rights of Access To See Letters of Recommendation for Admission for Applicants Who Do Matriculate	Active + 3 years
2-27	Transcripts-High School for Applicants Who Do Matriculate: Applicant's high school transcript	7 years
2-28	Transcripts-High School for Applicants Who Do Not Matriculate: Applicant's high school transcript	1 year
2-29	Transcripts-Other Colleges for Applicants Who Do Matriculate: Records of courses taken at other post-secondary institutions and documents supporting prior learning, including credit for military training.	Active + 1 year
2-30	Transcripts-Other Colleges for Applicants Who Do Not Matriculate: Records of courses taken at other post-secondary institutions and documents supporting prior learning.	1 year
2-31	Transient Documents: Includes telephone messages, post-it-notes, and other limited documents that serve to convey information of temporary importance in lieu of oral communication.	Until no longer of administrative value