

BGSU Schedule of Records Retention

Office: Bookstore

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: 12/06/2013

Records Manager: Signed

Date: 12/10/2013

Schedule Number	Record Series Title	Retention Period
3-01	Accounts Payable: Amounts owed on open accounts for goods or services received.	4 years, then recycle
3-02	Advertising/Promotional Materials: Materials made in house to promote the bookstore, including newsletters and brochures.	5 years, contact University Archives to appraise for historical value
3-03	Bookstore Management Documentation: Including buy-back records, cash drawer sign-out sheets, cashier balancing forms, charge forms, mark-up/markdown sheets, merchandise return records, vouchers, telephone expense reports, royalty payments, sales receipts, invoices, and special orders.	4 years, then recycle
3-04	Correspondence A. Routine/Transient: Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters B. General: Includes internal letters and memos; also correspondence from various individuals, companies, and	A. Retain until no longer of administrative value B. 1 year

Schedule Number	Record Series Title	Retention Period
	<p>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. Executive: Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters</p> <p>Note: Correspondence can be in physical or electronic format.</p>	<p>C. 3 years, have Archives appraise for historical value</p>
3-05	<p>Personnel Files: Unofficial copies, for departmental use only, of employment records for classified and administrative staff, both part-time and full-time. Files may contain applications, position descriptions, letters of commendation/reprimand, performance evaluations, leave forms, PERS forms, resignations, termination notices, and other related items.</p>	<p>Active + 1, destroy confidentially*</p> <p>Note: Human Resources maintains the official copy permanently.</p>
3-06	<p>Sales Records: Including gross receipts, register slips, Financial Aid sales, etc.</p>	<p>4 years, destroy confidentially*</p>
3-07	<p>Search Committee/Recruitment Files: Records of individuals who applied or interviewed for positions for which a committee was formed. Files contain position authorization forms, job descriptions, search committee minutes, applicants' credentials including non-hires, search chronologies, authorization to hire forms, correspondence with applicants and all handwritten notes from all interviewers.</p>	<p>3 years, then destroy confidentially*</p>
3-08	<p>Transient Documents: 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 messages, e-mail or voicemail, copies, notes or drafts used in the production of public records, and surveillance videos.</p>	<p>Until no longer of value or is superseded, then recycle</p>