

BGSU Schedule of Records Retention

Office: College of Health and Human Services

In accordance with ORC Section 149.33 and Bowling Green State University Board of Trustees, a schedule of Records Retention and Disposition for the following records is hereby established. This schedule shall be used in conjunction with the BGSU General Records Retention Schedule. This schedule and the General Schedule supersede any and all previous schedules for these records. The records covered by this schedule, upon expiration of the listed retention periods, shall be destroyed unless otherwise specified. No record shall be destroyed, however, that pertains to any pending claim, action, litigation, or request.

Approvals:

Department Official: Signed

Date: 06/06/2018

Records Manager: Signed

Date: 06/04/2018

Notes:

1. A Certificate of Records Disposal (CRD) should be prepared prior to the disposal of any records and retained by the office/department for 10 years after the date of disposal. A copy of the CRD should also be sent to the University Records Manager. **Confidential paper records must be disposed of through shredding with the University's approved shredding vendor.**
2. 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 all records regardless of format.

3. The University Archives will only collect those records series listed on the attached schedule as transferable to the Archives that at its discretion have continuing historical value. Other historic items listed on the attached schedule or on the university's General Records Retention Schedule may also be collected, at the discretion of the Archives.
4. Storage of inactive/non-permanent records is available at the University Records Center.
5. Forms, the General Records Retention Schedule, and other records management information can be found at the Records Management website (available at www.bgsu.edu/library/cac/rm).

Schedule Number	Record Series Title	Minimum Retention Period	End of Retention Period Activity	Schedule Source
56-1	Affiliation Agreements - legal agreements with other institutions involving students and academic programs	Active +8 years	Destroy	LEG2000
56-2	Speech and Hearing Clinic Client Files	Active +8 years	Destroy	Ohio Admin Code 3701-83-11

The General Records Retention Schedule includes, but is not limited to, the following categories of records:

- Accounting/Financial Records - General; Accounts Payable; Accounts Receivable; Deposits and Banking Records; Invoices, etc.
- Accreditation Files
- Advertising and Marketing materials
- Annual Reports
- Audit Petitions
- Budget Files
- Budget Transfers
- Committee Records
- Conference Files/Event Files

Contracts - General
Correspondence - Executive, General and Routine/Transient
Course Syllabi/Course Preparation Materials
Curriculum Development Documentation
Faculty Personnel Files (Local Copies)
Grade Changes/Extensions
Grant Files
Meeting Minutes
Personnel Disciplinary Records
Promotion and Tenure Files
Publications
Scheduling records, including appointment calendars
Search and Hiring Records/Search Committee Files
Student Academic Files
Student Disciplinary Files, including Academic Honesty