

BGSU Schedule of Records Retention

Office: Counseling Center

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: 06/30/2015

Records Manager: Signed

Date: 06/30/2015

Schedule Number	Record Series Title	Retention Period
97-1	Clinical Files: Includes all documents involving ongoing clients, C&As and CMs	Retain for 7 years after date of last service, then destroy in a manner that ensures confidentiality
97-2	File Cards: Index system to clinical files	Retain until of no administrative value, then destroy in a manner that ensures confidentiality
97-3	Black Book entries: Internal process-official documents in clinical files	Retain until of no administrative value, then destroy in a manner that ensures confidentiality
97-4	Green Binder entries: Internal process-official documents in clinical files	Retain until of no administrative value, then destroy in a manner that ensures confidentiality
97-5	Appointment Book pages/Weekly Summary Sheets	Retain for 10 years, then destroy in a manner that ensures confidentiality
97-6	New Client Profiles: Internal process-official documents in clinical files	Retain until of no administrative value, then destroy in a manner that ensures confidentiality

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97-7	Client Surveys	Retain surveys one semester after completed. Once data is compiled from the surveys, destroy in a manner that ensures confidentiality. Retain summary date until of no administrative value, then destroy
97-8	Trainee Personnel Files	Retain 5 years after date of last activity, then destroy in a manner that ensures confidentiality
97-9	Personnel/Graduate Assistant Files	Retain 5 years after date leaving employment, then destroy in a manner that ensures confidentiality. (Official records maintained in Human Resources or Graduate College)
97-10	Clinical Supervision Files	Retain for 5 years after the termination of supervision, retain until of no administrative value, then destroy in a manner that ensures confidentiality
97-11	Annual Reports	Retain one copy permanently. Transfer to University Archives when no longer of administrative value
97-12	Applicant Files (Search/Selection): May include applications, resumes, correspondence, forms and records of selection committee	Retain 1 year after date of hire, then destroy in a manner that ensures confidentiality (Official records maintained in Office Equity and Diversity)
97-13	Budget/Financial Files	Retain 3 years, then destroy
97-14	Correspondence-Executive: Pertains to significant aspects of the administration of the office, such as policy, programs, personnel and fiscal issues. Electronic correspondence may be deleted once printed and filed	Retain a minimum of 2 years in office, then transfer to University Archives
97-15	Correspondence-General: Includes internal letters and memos; also correspondence from individuals, companies and agencies requesting information pertaining to office and other miscellaneous inquiries. Electronic	Retain 1 year, then destroy

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	correspondence may be maintained in an electronic folder or printed out and filed for one year	
97-16	Correspondence Routine: Referral letters, requests for routine information usually answered by form letters, scheduling correspondence, etc. Electronic correspondence may be deleted immediately when designated of no use	Retain until of no administrative value, the destroy