

BGSU Schedule of Records Retention

Office: Marketing Department

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: 04/04/2012
Records Manager: Signed Date: 04/10/2012

Please note that this schedule applies to records in both paper and/or electronic format.

Schedule Number	Record Series Title	Retention Period
027 - 01	Accounting Records: Includes requisitions, purchase orders, invoices, travel vouchers, receipts, bills, etc.	4 years, then destroy; if scanned, retain 18 months, then destroy
027 - 02	Accreditation Files: Department files documenting accreditation review by accrediting agencies.	Retain 10 yrs. Appraise for transfer to Archives
027 - 03	Book Orders	4 years, then destroy
027 - 04	Budget Planning File (original maintained by BGSU Budget Office)	active + 1 year, then destroy
027 - 05	Canceled Checks: For foundation donations	4 years, then destroy
027 - 06	Chair's General Subject File: Correspondence and reports with other BGSU units and external agencies	2 years; review reports/circulars from other units/external agencies for destruction, transfer rest to Archives

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027 - 07	Conference & Symposium Files: Includes correspondence, reports, programs, etc. for events sponsored or hosted by department	3 years; destroy menus, invoices, receipts; review for transfer to Archives
027 - 08	Correspondence, Executive: Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters	2 years, then appraise for historical value
027 - 09	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
027 - 10	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
027 - 11	Course Proposals & Curriculum Modification Requests: Forms proposing new courses and changes to curriculum submitted to 'Provost	Until no longer of administrative value; Archives receives records from Provost
027 - 12	Course Syllabi	active + 6 yrs, then destroy
027 - 13	Curriculum Development Files	Retain in office until no longer needs; transfer to Archives
027 - 14	Departmental Administration Files: correspondence, reports, and materials documenting the activities and concerns of the Department	2 years; destroy all materials not documenting a significant action or interaction; transfer remainder to Archives
027 - 15	Departmental Committee Files: agendas, minutes, correspondence, reports of committees, task forces, etc. Includes department advisory council files.	3 years; transfer to Archives
027 - 16	Disciplinary Records (original kept by Provost or Human Resources)	destroy on request after 2 years from date of disciplinary action, provided no related reprimands, suspensions, or demotions. May be destroyed in less time if ordered by

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		Arbitrator, SERB, SPBR, or court of competent jurisdiction
027 - 17	Drafts: Preliminary outlines of a plan or document.	Retain until superseded, or issuance of final report or policy.
027 - 18	Drop/Add Forms	Active + 1 year, then destroy
027 - 19	Financial Accounting Statement: issued monthly by the Business Office who has original record; provides record of expenses, income, and balances for each account	4 years, then destroy
027 - 20	General Files: correspondence, reports, and publications of other departments of BGSU and external agencies	1 year, then destroy
027 - 21	Grade Reports: Copy of faculty grade report submitted by faculty to Registrar.	Retain until the end of the 5th week of the following Semester, then destroy unless there is an appeal pending. Destroy records involved in an appeal after the appeal process is completed. Registration & Records maintains official record permanently.
027 - 22	Merit/Salary Files: includes files created in deciding and awarding merit and salary increases.	Retain 5 years after merit/salary process in complete then destroy. College office maintains summary information.
027 - 23	Promotional and Publicity Materials concerning the activities of the department	3 years; transfer to Archives
027 - 24	Personnel Records, Administrative & Classified: May include contracts, performance evaluations, reclassifications, promotions, resignation/termination notices	Active + 5 years, then destroy, Human Resources maintains official record
027 - 25	Personnel Files, Faculty: Includes documentation on employment within the dept	Retain until faculty member retires or leaves the university, then destroy; Official record maintained by Provost

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027 - 26	Personnel Files, Faculty - Adjunct	Maintain 5 years, then review for destruction
027 - 27	Personnel Files, Student	Active + 6 months, then destroy
027 - 28	Promotion and Tenure Files: faculty dossier consisting of copies of documentation of teaching, research, and community service	Retain decision documentation in personnel file; return material submitted to faculty member after 3 yrs
027 - 29	Search Committee Records: job posting, list of candidates final report	3 years; Office of Equity & Diversity maintains official record. Retain unsuccessful applications 1 year, then destroy.
027 - 30	Schedule, Master: Semester listing of courses actually offered; original maintained permanently by Registration and Records	6 years, then destroy
027 - 31	Scholarships: Application documentation, correspondence, information about scholarship	Retain information on recipients permanently. Retain files created for award process 1 year after award given, then destroy.
027 - 32	Students Statistics: enrollment reports, grade point studies of department	8 years; review for continuing value
027 - 33	Teaching Evaluations: Student evaluations of teaching used for reappointment, promotion and tenure.	Retain summary 6 yrs after date of summary. Original evaluations returned to instructor after summary compiled.
027 - 34	Tests: examinations by students leading to a grade and to posting on the official student record of Registrar	1 year, then destroy
027 - 35	Time Cards and Sheets	5 years