

# BGSU Schedule of Records Retention

## Office: Risk Management

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: 09/19/2001

Records Manager: Signed

Date: 09/28/2001

Schedule Number	Record Series Title	Retention Period
35-1	Account Journal/Ledger	6 years
35-2	Appraisals of Art/Property	Retain the most current appraisal and the one previous appraisal
35-3	Bids, Accepted	Active + 5 years
35-4	Bids, Rejected	3 years
35-5	Budget Planning Files: (original maintained by BGSU Budget Office)	Active + 1 year
35-6	Certificate of Insurance	3 years following expiration
35-7	Claims (liability waivers)	Active + 5 years
35-8	Defensive Driving Documentation	3 years
35-9	Departmental Administration Files: correspondence, reports, and materials documenting activities and concerns of the department	3 years; destroy all materials not documenting a significant action or interaction; transfer remainder to Archives

Schedule Number	Record Series Title	Retention Period
35-10	<b>General Files:</b> correspondence, reports, and publications of other BGSU departments and external agencies	1 year
35-11	<b>Insurance for Student Internships</b>	Active + 5 years
35-12	<b>Inter-Departmental Billing</b>	4 years
35-13	<b>Invoices</b>	4 years
35-14	<b>Legal Insurance:</b> relates to coverage affecting liability. Includes policies, amendments, riders proof payment, etc.	Active + 5 years
35-15	<b>Legal Insurance Future Liability:</b> relates to insurance coverage for product liability, exposure to hazardous substances, or other problems manifesting long after the policy terminates. Includes liability policies.	Indefinite
35-16	<b>Minutes</b>	Transfer to Archives when no longer of administrative value
35-17	<b>Motor Vehicle Record Statements</b>	Minimum of 2 years or until superceded
35-18	<b>Payment Detail:</b> issued monthly by Business Office who keeps original record; provides record of expenses, income, and balances for each account	3 years
35-19	<b>Personnel Files</b>	Active + 6 years
35-20	<b>Planning/Strategic Goals</b>	Active + 1 year
35-21	<b>Policies/Procedures</b>	Active + 10 years
35-22	<b>Self-Study – Peer Review</b>	10 years
35-23	<b>Surety Bonds</b>	Active + 5 years
35-24	<b>Time Sheets</b>	5 years
35-25	<b>Travel Reimbursement</b>	4 years