

BGSU Schedule of Records Retention

Office: Bowen-Thompson Student Union

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: 06/03/2015

Records Manager: Signed

Date: 06/03/2015

Schedule Number	Record Series Title	Main Format(s)	Retention Period
21-01	Accounting Records: Including accounts payable, invoices, ledgers, vouchers, accounts receivable, annuity records, bad debt actions, balance sheets, cash books, cash disbursement journals, cash journals, receipts, register tapes/reports, chart of accounts, cost accounting, expenditure reports, journal entries, journals, payroll change reports, checks, petty cash records, registers, requisitions, royalty payments, student accounting records, travel expenses, workers compensation.	Electronic/Paper	4 years, then recycle
21-02	Activity Logs Lists activities occurring in various rooms on a specific day in the union.	Paper	Until no longer of administrative value, then recycle
21-03	Annual Report/Program Reviews/Self-Studies: Annual self-study of the	Electronic/Paper	3 years, then contact University

Schedule Number	Record Series Title	Main Format(s)	Retention Period
	department or a program that encompasses at least some or all of the following: activities, outreach events, personnel changes, logistical information, future goals, etc. Also any special reports, statistical reports, dept. publications, etc.		Archives for historic appraisal
21-04*	Conference/Event Files Administrative documentation of a conference or event at the Student Union. Includes requests for space, reservation confirmations, space layouts, correspondence with requestor, financial documents, etc.	Electronic/Paper	4 years, then delete/recycle*
21-05	Contracts General contracts between the BTSU and another entity, including vendors.	Paper	Active + 5 years, recycle
21-06	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 organizations requesting information pertaining to agency and legal interpretations and other miscellaneous inquiries. This correspondence is informative, (it does not attempt to influence policy). C. Executive: Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters.	Paper/Email <i>Note: Contact the University Records Manager for help with email management. Also see the electronic records tutorial.</i>	A. Retain until no longer of administrative value, then recycle or delete from email client B. 1 year, then recycle or delete from email client C. Retain 3 years (if email retain in email client), then delete or export from email client and retain until no longer of value

Schedule Number	Record Series Title	Main Format(s)	Retention Period
21-07	Meeting Minutes: Minutes of BTSU-related committees. For example, the Student Union Advisory Council.	Electronic	3 years, then contact University Archives to appraise for historic value
21-08*	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.	Paper	Active + 1 year, shred* Note: Human Resources maintains the official copy permanently.
21-09	Promotional/Advertising Materials: Materials made to promote the Student Union; i.e. brochures, newsletters, pamphlets, videos, etc. Includes digital videos created by the Union's media team.	Electronic/Paper	Upon creation, contact University Archives to appraise for historic value Retain all other copies until no longer of value, then recycle
21-10	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.	Electronic/Paper	Until no longer of value or superseded, then recycle or delete

*For these record series, a [Certificate of Records Disposal \(CRD\)](#) must be filled out prior to disposal. The specific college/department must retain the CRD on file for 10 years after the date of disposal, and a copy of the CRD must be sent to the University Archives. Confidential paper records must be disposed of through Certified Document Destruction, Inc., and must be scheduled through the University Records Manager (372-9614).

Note: 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 records regardless of format.

Comments

1. The University Archives will only collect record series 21-03, 21-07, 21-09. Other historic items listed on the university's [General Retention Schedule](#) may also be collected, at the discretion of the archives.
2. Storage of inactive/non-permanent records is available at the University Records Center.
3. Other common records that may not be listed on this schedule may be on the university's [General Retention Schedule](#); offices may use retentions listed on the General Retention Schedule for records not listed on their departmental schedule.