

# BGSU Schedule of Records Retention

## Office: Undergraduate Student Government

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: 06/24/2014

Records Manager: Signed

Date: 06/24/2014

Schedule Number	Record Series Title	Main Format(s)	Retention Period
146-01	<b>Accounting Records:</b> 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, 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.	Paper/Electronic	4 years, then recycle/delete
146-02	<b>Advertising/Promotional Materials:</b> Materials made in house to promote the department/college/university; i.e. brochures, newsletters, pamphlets, publications, etc.	Paper	Upon creation, contact University Archives to appraise for historic value  Retain all other copies until no longer of

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			administrative value, then recycle
146-03	<b>Annual Report:</b> Annual self-study of USG that encompasses at least some or all of the following: activities, outreach events, personnel changes, logistical information, future goals, etc. Includes all other special reports.	Paper/Electronic	3 years, then contact University Archives for historic appraisal.
146-04	<b>Award Files:</b> All materials submitted to USG for various awards. Materials include applications and essays.	Paper	3 years, then shred materials of non-awarded applicants. Transfer winning applicant's materials to University Archives.
146-05	<b>Budgetary and Budget Planning Records:</b> May include budget request, budget plans for upcoming fiscal year, etc.	Paper/Electronic	Active + 1 year, then recycle/delete
146-06	<p style="text-align: center;"><b>Correspondence</b></p> <p><b>A. Routine/Transient:</b> Referral letters, requests for routine information or publications provided to the public by an agency that are answered by standard form letters</p> <p><b>B. General:</b> 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).</p> <p><b>C. Executive:</b> Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters.</p>	<p>Email/Paper</p> <p><i>Note: Contact the University Records Manager for help with email management</i></p>	<p><b>A.</b> Retain until no longer of administrative value, then recycle or delete from email client</p> <p><b>B.</b> 1 year, then recycle or delete from email client</p> <p><b>C.</b> Retain 3 years (if email retain in email client), then delete</p>
146-07	<b>Meeting Minutes and Governance Documents:</b> Minutes and files of USG	Paper/Electronic	3 years, then contact University Archives to

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	and its committees, including agendas, bills, resolutions, constitutions, etc.		appraise for historic value
146-08	<b>Transient Documents:</b> 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.	Paper/Electronic	Until no longer of value or superseded, then recycle or delete

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.