

# BGSU Schedule of Records Retention

## Office: University Libraries—Access Services

In accordance with ORC Section 149.33 and Bowling Green State University Trustees, a schedule of Records Retention and Disposition for the following records is hereby established. This schedule shall be used in conjunction with the BGSU General Records Retention Schedule. This schedule and the General Schedule supersede any and all previous schedules for these records. The records covered by this schedule, upon expiration of the listed retention periods, shall be destroyed unless otherwise specified. No record shall be destroyed, however, that pertains to any pending claim, action, litigation, or request.

### Approvals:

Department Official: Signed

Date: 06/05/2019

Records Manager: Signed

Date: 06/05/2019

### Notes:

1. A Certificate of Records Disposal (CRD) should be prepared prior to the disposal of any records and retained by the office/department for 10 years after the date of disposal. A copy of the CRD should also be sent to the University Records Manager. **Confidential paper records must be disposed of through shredding with the University's approved shredding vendor.**
2. 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 all records regardless of format.
3. The University Archives will only collect those record series listed on the attached schedule as transferrable to the Archives that at its discretion have continuing historical value. Other historic items listed on the attached schedule or on the university's General Records Retention Schedule may also be collected, at the discretion of the Archives.

4. Storage of inactive/non-permanent records is available at the University Records Center.

5. Forms, the General Records Retention Schedule, and other records management information can be found at the Records Management website (available at [BGSU's Records Management webpage](#)).

Schedule Number	Record Series Title	Minimum Retention Period	End of Retention Period Activity	Schedule Source
137-1	<b>Patron Billings</b> -Invoices: overdue, manual, lost book, associated forms connected to billed items, email correspondence about billed items that results in a credit for fines set to bursar. Includes fines incurred through ILL.	4 years	Destroy	IUC ACC 1000
137-2	<b>Correspondence-Notices (overdue)</b> : manual notice run daily of all items overdue, includes all levels of overdue	5 months	Destroy	IUC pgs. ix-x
137-5	<b>Inter-Library Loan (ILL) Requests</b> -request records and billing information	Request records: 3 years for copyright compliance purposes Billing-see 137-1	Destroy	IUC ACC 1000
137-6	<b>Key sign out sheets</b> -logs of who has used specific library keys	Two semesters after creation	Destroy	IUC pgs. ix-x
137-7	<b>Reserve Drop-Off Logs and Book Release Forms</b> -documents the transfer of ownership for personal and library owned copies	Two semesters after creation	Destroy	IUC pgs. ix-x
137-8	<b>Reserve Faculty/Course Form</b> -Requests from Faculty to place an item on reserve	Active + 1 semester	Return to faculty	IUC pgs. ix-x
137-9	<b>Patron Records (Sierra)</b> -records for BGSU affiliates, courtesy card users, and visiting researchers used to check out items	4 year	Destroy	IUC ACC 1000

Schedule Number	Record Series Title	Minimum Retention Period	End of Retention Period Activity	Schedule Source
137-10	<b>Fine Records (Sierra)</b>	4 years	Destroy	IUC ACC 1000

The [General Records Retention Schedule](#) includes, but is not limited to, the following categories of records:

Accounting/Financial Records—General; Accounts Payable; Accounts Receivable; Deposits and Banking records; Invoices

Budget Files

Committee, Cabinet, Working Groups and Task Force files

Correspondence and Memoranda-Routine and Transient

Correspondence and Memoranda/General Subject Files (including Upper Administration)

E-Mail

Personnel Records-Local Copies

Reports-Annual or Major

Student Worker/Assistant Personnel Files