

BGSU Schedule of Records Retention Office: Continuing and Extended Education

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: 02/06/2007

Records Manager: Signed

Date: 01/31/2007

Schedule Number	Record Series Title	Retention Period
6-1	Accounts Payable and Receivable Records Records of amounts owed or due for services on open accounts	Retain 4 years, then destroy
6-2	Advertising/Promotional Materials Includes newsletters, brochures, multi-media, course description brochures, etc.	Retain in office 5 years, transfer to University Archives
6-3	Annual Reports	Retain until of no administrative use, transfer 1 copy to University Archives
6-4	Bank Deposits, Bank Statements, Cancelled Checks, Check Registers, Receipts, Invoices (Study Abroad Programs)	Retain 4 years, then destroy (after internal audit completed)
6-5	Budget Documents (projections, P-I forms, salary and merit pool forms)	Retain 5 years after end of budget year, then destroy. (Used for program review). Approved budgets maintained with Vice President of Finance and Administration
6-6	Budget Transactions Records documenting financial transactions involving the budget. May	Retain until of no administrative use, then destroy

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	include budget transfers, monthly printouts, etc.	
6-7	Continuing Education Student Records/Registration/Enrollment Records Includes records documenting students enrolled in special interest courses and students enrolled in professional certification programs. May include record of CEUs.	Retain 6 years after date of last activity, then destroy
6-8	Contracts-General Includes contracts for services, purchases and sales, transportation, leases, property and construction, exchange of property, etc. Includes government contracts and grants	Retain 5 years after date of last activity, then destroy
6-9	Correspondence-Executive Deals with significant aspects of the administration of the office. Includes information on policy, programs fiscal or personnel matters. Electronic correspondence may be deleted once printed and filed	Retain 2-5 years, then transfer to University Archives
6-10	Correspondence-General Includes internal letters and memos; also correspondence from various individuals, companies and organizations requesting information pertaining to agency and other miscellaneous inquiries. Electronic correspondence may be maintained in an electronic folder or printed out and filed for one year.	Retain 1 year, then destroy
6-11	Correspondence-Routine Referral letters, requests for routine information or publications usually answered by form letters. Electronic correspondence may be directly deleted.	Retain until of no administrative use, then destroy
6-12	Course Evaluations (Non-credit programs)	Retain 2 years, then destroy
6-13	Drafts Preliminary outlines of a plan, policy, report, or document, whether in printed or electronic format	Retain until final document is completed, then destroy

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6-14	Faculty Contracts	Retain for 2 years, then destroy. Official contracts/records kept in the Office of the Provost
6-15	Graduate Success Program (former Summer Freshman Program) Credential files for intern teachers within a specific field who return to assist freshmen. Fees are waived in exchange for service.	Retain 5 years, then destroy
6-16	I-9 and DMA Forms	For faculty or staff hired by University, originals are kept in Provost or Human Resources Office. Retain copies 2 years, then destroy. Original documents for credit and non-credit instructors/speakers, etc. are kept in the Provost's office and original documents for CEE staff are kept in Human Resources.
6-17	Instructor Contracts (CEE)	Retain 6 years after date of last activity, then destroy. Official records kept in CEE office.
6-18	Lists/Directories Mailing lists, directories, rosters (either created or received)	Retain until superseded or obsolete, then destroy
6-19	Non-Degree Graduate Applications	Retain 10 years, then destroy
6-20	Non-Traditional Students Evening Credit Master List Record of undergraduate, graduate, full and part-time evening adult students. Includes pertinent personal data	Retain 5 years, then destroy
6-21	Personnel Files-Administrative and Classified May include position descriptions, appointment records, salary rates, copies of contracts, evaluations, reclassifications, evidence of training, letters of commendation or reprimand, step and longevity increases, vacation/sick leave forms, resignation/termination records	Retain 5 years after date of last activity, then destroy. Office of Human Resources maintains official files
6-22	Purchase Orders and Requisitions	Retain 4 years, then destroy
6-23	Subject Files-Dean's Office	Retain 5 years in office, then transfer to University Archives

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	Includes correspondence, committee files and reports, subject files (usually in alphabetical order) and other records documenting activities of the Office	
6-24	Summer Workshop Files Summer workshops sponsored by CEE-planning files, financial reports, etc.	Retain 5 years, then transfer to University Archives
6-25	Travel Expense/Business Entertainment Expense Records	Retain 4 years, then destroy
6-26	Transient Documents Includes telephone messages, post-it-notes, and other similar documents that serve to convey information of temporary importance in lieu of oral communication. This includes all such documents in electronic formats and voice mail	Retain until of no administrative use, then destroy
6-27	Videos/CDs/DVDs and other audio-visual and electronic training materials	Retain until superseded or obsolete then destroy.
6-28	Course Syllabi For both credit and noncredit courses	Retain six years after date of last activity, then destroy