

BGSU Schedule of Records Retention Office: Vice President for Research & Economic Development and Dean of the Graduate College

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
Records Manager: Signed

Date: 02/27/2014
Date: 02/27/2014

Schedule Number	Record Series Title	Main Format(s)	Retention Period
12-01	Advertising/Promotional Material: Materials made in house to promote the department/college/university, such as brochures, pamphlets, etc.	Paper/Electronic	Upon creation, contact University Archives for historic appraisal Retain all other copies until no longer of administrative value, then recycle
12-02	Annual Reports: Annual self-study of the department that encompasses at least some or all of the following: department activities, outreach events, personnel changes, logistical	PDF	3 years, contact University Archives for historic appraisal Recycle/delete all other copies

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	information, future goals, etc. Usually created by the director/chair/etc.		
12-03	Budgetary Files: Including accounts payable and receivable, banking records, budget printouts, budget planning documents, budget transfers, cash books, invoices, purchase orders, requisitions, receipts, telephone expense records, travel expense authorizations	Paper/Electronic	4 years, then recycle Note: Items with account numbers or credit card numbers should be destroyed confidentiality*
12-04	<p>Correspondence</p> <p>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</p> <p>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).</p> <p>C. Dean's Correspondence: Deals with significant aspects of the administration of the offices. Includes information on policy, program, fiscal or personnel matters.</p> <p>Note: Contact the University Records Manager for help with email management.</p>	Paper/Email	<p>A. Retain until no longer of administrative value, then recycle or delete from email client</p> <p>B. 1 year, then recycle or delete from email client</p> <p>C. Retain 3 years in email client, then contact University Archives for historic appraisal</p>

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12-05	Curriculum Modification Files and Related Documents: Record of proposal documentation and signature sheets authorizing the implementation of new programs or expansion of existing programs at BGSU. Record of special fees associated with existing courses.	Paper	Until no longer of administrative value, then recycle. Note: Provost maintains original record.
12-06	Degree Proposals: Proposal narratives for new graduate degree programs.	Paper	Retain until program decision is finalized, then contact University Archives for historic appraisal
12-07	Graduate Catalog: Current Graduate College course offerings and program information.	PDF	Upon creation, contact University Archives for historic appraisal
12-08	Graduate Council Minutes	PDF	3 years, contact University Archives for historic appraisal
12-09	Graduate Faculty Status: Applications and vitae of graduate faculty. These documents are used during the promotion/tenure process. They are created in response to requests for regular/provisional appointment to Graduate Faculty status or requests for adjunct status.	Paper	Active + 3 years, then destroy confidentially* Note: These records are transferred to Provost and will be maintained permanently in the faculty personnel file.
12-10	Program Reviews: Self-studies and reviews of graduate programs.	Paper/PDF	Upon creation, contact University Archives for historic appraisal
12-11	Records Destruction Reports (Certificate of Records Disposal): Lists schedule number, record series, inclusive dates, and date of disposal. These reports must be	Paper/PDF	10 years, then recycle Note: Forward one copy to University

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	filled out every time a confidential record series is disposed*.		Archives (CAC, Fifth Floor—Jerome Library)
12-12	Search Committee Files: Faculty/Staff search files. May contain position authorization forms, job descriptions, minutes, applicants' credentials, search chronologies, authorization to hire forms, correspondence.	Paper	3 years, then destroy confidentially*
12-13	Subject Files: A. Executive: Files of correspondence, reports, memoranda, etc., documenting activities of upper level administrative offices B. General: Files of correspondence, reports, memoranda, etc., documenting activities of general administrative offices [Note: Excludes President, Vice President, Director, Dean, Chair, or other upper level administrative office].	Paper/Electronic	A. 3 years, contact University Archives to appraise for historical value B. 1 year, then recycle or delete
12-14	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.	Paper/Electronic	Until no longer of administrative value, then recycle or delete

*For record series that are destroyed confidentially, 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 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.