



Ohio History Connection
 State Archives of Ohio
 Local Government Records Program
 800 E. 17th Avenue
 Columbus, Ohio 43211-2474
 614.297.2553
localrecs@ohiohistory.org
www.ohiohistory.org/lgr

OHIO HISTORY CONNECTION

Page 1 of ___

JAN 03 2019

STATE AND LOCAL
 GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)– Part 1

See instructions before completing this form. Must be submitted with PART 2

Section A and Section B must be filled out and signed by local government before submission to the State Archives

Section A: Local Government Unit

Russell Township Board of Trustees

(Local Government Entity)	(Unit)		
	Karen Walder	Fiscal Officer	12/27/18
(Signature of Responsible Official)	(Name)	(Title)	(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

	Records Commission	440-338-8155	
			(Telephone Number)
PO Box 522	Novelty	44072	Geauga
(Address)	(City)	(Zip Code)	(County)

To have this form returned to the Records Commission electronically, include an email address:

kwalder@russelltownship.us

I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, or otherwise disposed of in violation of these schedules and that no record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. This action is reflected in the minutes kept by this commission.

	12/27/18
Records Commission Chair Signature	Date

Section C: Ohio History Connection - State Archives

	Local Government Records Archivist	1/8/19
Signature	Title	Date

	Records Mgr	1-14-19
Signature	Title	Date

Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form

Minutes of **TOWNSHIP RECORD RETENTION COMMITTEE** **RECORD OF PROCEEDINGS** SPECIAL Meeting

BEAR GRAPHICS 800-325-8064 FORM NO. 10149

RUSSELL FIRE-RESCUE STATION

November 15, 2017

Held _____ 20____

~~Mr. Madden called the meeting to order at 5:19 pm. Mr. Walder was also present.~~

Mr. Walder made the motion to accept the changes to the Township's records retention schedule as presented in the Records Retention Revisions 2017-1115 document. Mr. Madden seconded the motion and it passed.

Mr. Madden made the motion to adjourn. Mr. Walder seconded and it passed.

The meeting was adjourned at 5:22 pm.

Justin Madden, Chairman

Charles Walder, Fiscal Officer

Recorded by: J. Dorka

Russell Township
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(unit)

UNLAN = Until No Longer Administratively Necessary
Multi = Multiple Types of Media
P/E = Paper and/or Electronic

ADMINISTRATIVE

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
A-01	Activity Reports - <i>records activity of the organization</i>	2 years	Multi		<input type="checkbox"/>
A-02	Administrative & Fiscal Reports - <i>an account or statement describing in detail the public treasury or revenues or the affairs of the organization</i>	3 years, provided audited	P/E		<input type="checkbox"/>
A-03	Aerial Photographs	Permanent	P/E		X ✓
A-04	Agendas	6 years	P/E		<input type="checkbox"/>
A-05	Appointment books, records, calendars, schedules, organizers & planners - <i>to keep track of appointments & activities</i>	Dispose after audited	P/E		<input type="checkbox"/>
A-06	Awards, Significant Articles, Clippings & Photographs	UNLAN	P/E		<input type="checkbox"/>
A-07	Back Up Data (Not Duplicated) on Desktops, Laptops and Other Electronic Devices	RAID-Level 1	E		<input type="checkbox"/>
A-08	Blank Forms- <i>used to document information required for a specific purpose.</i>	UNLAN	P/E		<input type="checkbox"/>
A-09	Bulletins, Posters, Displays, Training materials for Employees- <i>intended for educating employees</i>	UNLAN	P/E		<input type="checkbox"/>
A-10	Business Cards – Rotary, Rolodex and Applicable software files- <i>contact information kept and used as a reference tool.</i>	UNLAN	P/E		<input type="checkbox"/>
A-11	Case Files, Civil	10 years provided no action pending	P/E		X ✓
A-12	Case Files, Criminal	10 years, provided no action pending	P/E		X ✓
A-13	Contracts and Agreements	10 years	P/E		<input type="checkbox"/>
A-14	Copier Counts -- <i>Copy counter checks sent for invoicing per copy contract.</i>	Until invoiced	P/E		<input type="checkbox"/>
A-15	Copies – <i>All media Reading/Information/Reference Copy</i>	UNLAN	Multi		<input type="checkbox"/>
A-16	Correspondence - <i>communication by exchange of letters or electronic transmission such as Routine Form Letters, General, Legislative Branch, Unsolicited Mail, Transient Correspondence, Junk Mail, Junk E-Mail, Spam E-Mail</i>	UNLAN	P/E		<input type="checkbox"/>
A-17	Deeds	Permanent	P/E		X ✓

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C. Page 2 of 21

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
A-18	Delivery Slips/Packing Slips - documents the receipt of items ordered and received	UNLAN	P/E		<input type="checkbox"/>
A-19	Disaster Plans - procedures and proper responses to a calamitous events especially one occurring suddenly and causing great loss of life, damage, or hardship, as a flood, business failure, etc.	Until superseded	P/E		<input type="checkbox"/>
A-20	Drafts - preliminary document, not in final form	Dispose with modified drafts replaced with final prepared minutes	Multi		<input type="checkbox"/>
A-21	Easements	Permanent	P/E		X
A-22	Emails-electronic correspondence received or sent regarding operations, information, or documentation of Township business (see correspondence for all other emails).	30 days after no longer administratively useful	P/E		<input type="checkbox"/>
A-23	Equipment Inventories - filed with property/vehicle inventory.	Until Superseded	P/E		<input type="checkbox"/>
A-24	Equipment Maintenance Records	Life of equipment	P/E		<input type="checkbox"/>
A-25	Expense Reports - documents expenditures in written format.	3 years, provided audited	P/E		<input type="checkbox"/>
A-26	Fax and Messages - documents faxes sent & received	UNLAN	P/E		<input type="checkbox"/>
A-27	Flow Charts - operations - a detailed diagram or chart of the operations of the township	Until Superseded	P/E		<input type="checkbox"/>
A-28	General Administrative Files - documents activity of the office	UNLAN	P/E		<input type="checkbox"/>
A-29	General orders, directives, policies, rules, regulations or procedures - documents how the organization operates	Until superseded, retain one copy until audited	P/E		<input type="checkbox"/>
A-30	Informal notes, Tracings, Mylar - a drawing, map, plan, etc., used to depict lands, buildings, etc.	UNLAN	P/E		<input type="checkbox"/>
A-31	Leases - record of property that is rented under contract	2 years after expiration	P/E		<input type="checkbox"/>
A-32	Legal Notices	5 years, provided audited	P/E		<input type="checkbox"/>
A-33	Legal Opinions from Board	Permanent	P/E		X

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A-34	Licenses, Permits and Certifications	1 year after expiration	P/E		<input type="checkbox"/>
A-35	Lists/rosters, informational directories containing employee contact information- <i>list of employees and information specific to each person</i>	Continually updated, maintain until superseded	P/E		<input type="checkbox"/>
A-36	Mail - <i>groundless complaints, sales materials, transitory messages and informational brochures - information & communications received but not necessarily requested.</i>	UNLAN	P/E		<input type="checkbox"/>
A-37	Mailing lists - <i>list of names, addresses, etc. of those who receive mail and other correspondence</i>	Until updated, superseded or obsolete	P/E		<input type="checkbox"/>
A-38	Management/Operations reports - <i>document operations of organization or departments</i>	Until incorporated into annual report	P/E		<input type="checkbox"/>
A-39	Manuals, handbooks, directives - <i>contains policies, procedures, etc. of the organization</i>	Until superseded or obsolete	P/E		<input type="checkbox"/>
A-40	Maps/plats	Until updated, superseded or obsolete	P/E		<input checked="" type="checkbox"/>
A-41	Meeting Recordings- <i>an electronic recording of minute proceedings, including video and audio tape recording</i>	Dispose with draft or written transcription	E		<input type="checkbox"/>
A-42	Meeting Sign In Sheets	1 year	P/E		<input type="checkbox"/>
A-43	Meeting/Sunshine notices	2 years provided audited	Multi		<input type="checkbox"/>
A-44	Minutes of Meetings- <i>permanent record of official meetings</i>	Permanent	P/E		<input checked="" type="checkbox"/>
A-45	Motor Vehicle Registration Forms	3 years	P/E		<input type="checkbox"/>
A-46	Notes-used to draft Township meeting minutes	UNLAN; disposal after draft minutes are prepared			<input type="checkbox"/>
A-47	Publications - documents, flyers, posters, brochures, etc. published by or for the township to discriminate information	UNLAN	P/E		<input type="checkbox"/>
A-48	Policy and Procedure Manual- Entails the Township's policies and forms	Until superseded	P/E		<input type="checkbox"/>
A-49	Postal Records - registered, certified, bulk mail permit receipts	2 years	Paper		<input type="checkbox"/>
A-50	Public Records Requests	2 years	P/E		<input type="checkbox"/>

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A-51	Photos	UNLAN	Multi		<input type="checkbox"/>
A-52	Planning, Scheduling, Calendar, Training Information & Data	Continually updated and revised	Multi		<input type="checkbox"/>
A-53	Press/news releases - to communicate information on upcoming events and news	UNLAN	P/E		<input type="checkbox"/>
A-54	Professional & trade magazines, catalogs, reference publications & directories - used for reference or for purchasing needed items	UNLAN	P/E		<input type="checkbox"/>
A-55	Professional organizations & association files - record of participation in professional organizations	UNLAN	P/E		<input type="checkbox"/>
A-56	Project files – documents, quotes, project plans, change orders	Life of project or obsolete, appraise for historical value	P/E		<input checked="" type="checkbox"/>
A-57	Quarterly and Annual Reports - documents activity reports from Department Heads.	3 years, provided audited	P/E		<input type="checkbox"/>
A-58	Records retention documents RC-1, RC-2, RC-3 - documents records kept by the organization and length of time specific records are kept	Until superseded	P/E		<input type="checkbox"/>
A-59	Records Inventory	Until superseded	P/E		<input type="checkbox"/>
A-60	Research Files	5 years	P/E		<input type="checkbox"/>
A-61	Rosters/directories - list contacts and contact information	Until obsolete	P/E		<input type="checkbox"/>
A-62	Social Media - Facebook, Twitter, YouTube, etc.posts/uploads/downloads	Purged when new post is made	P/E		<input type="checkbox"/>
A-63	Software and Office Equipment	Until superceded			
A-64	Speeches/presentations - oral or written public information discriminated in presentation format	3 years	Multi		<input type="checkbox"/>
A-65	Statistical reports - the collection, organization, analysis, interpretation and presentation of data.	3 years	P/E		<input type="checkbox"/>
A-66	Surveys & Questionnaires - statistical record and/or a series of questions asked to individuals for answers	3 years	P/E		<input type="checkbox"/>
A-66	Surveillance tapes/videos, video files	Overwrite files as necessary on drive; UNLAN	Multi		<input type="checkbox"/>
A-67	Text Messages	UNLAN	E		<input type="checkbox"/>

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
A-68	Training Material, lesson plans - <i>information presented for training purposes</i>	UNLAN	P/E		<input type="checkbox"/>
A-69	Township Property Files	Permanent	P/E		X <input checked="" type="checkbox"/>
A-70	Transient items – <i>post-it, voicemail, to-do list, e-mail, etc.</i>	UNLAN	P/E		<input type="checkbox"/>
A-71	Vehicle Maintenance and Mileage Records	Until vehicle sold	P/E		<input type="checkbox"/>
A-72	Vendors & Suppliers - <i>list of vendors and suppliers used by township</i>	Until revised, obsolete or superseded	P/E		<input type="checkbox"/>
A-73	Voicemail messages	UNLAN	Multi		<input type="checkbox"/>
A-74	Warranties	Dispose after expiration	P/E		<input type="checkbox"/>
A-75	Website Updates and Webpages	UNLAN; retained until next version is published	P/E		<input type="checkbox"/>

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BOARD OF TRUSTEES

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
T-01	Liquor License Requests- - Approved -must keep per regulation 4303.07(1)(B) for period of time specified - Denied -must keep per regulation 4303.07(1)(B) for period of time specified - Objections - record kept in Minutes	3 years	Paper		<input type="checkbox"/>
		1 year	Paper		<input type="checkbox"/>
		Permanent			
T-02	Oaths of Office - an oath or affirmation a person takes before undertaking the duties of an office	Permanent	Paper		X ✓
T-03	Resolutions- a formal expression of opinion or intention i.e. agreements, policies, express condolences, etc.	Permanent	P/E		X ✓
T-04	Petitions- a formally drawn request, often bearing the names of a number of those making the request,	Permanent	P/E		<input checked="" type="checkbox"/> ✓
T-05	Board Member Files - files documenting the affairs of the organization	Content retention length	P/E		<input checked="" type="checkbox"/> ✓
T-06	Term Expiration List – Public Officials- <i>depicts the time period an elected official serves until another election must be held</i>	Until superseded	P/E		<input type="checkbox"/>
T-07	Board Rules and Procedures	Until superseded, retain 1 copy	P/E		<input type="checkbox"/>
T-08	Transient items – <i>post-it, voicemail, to-do list, e-mail, etc.</i>	UNLAN	P/E		<input type="checkbox"/>
T-09	Township Property Request Forms- <i>Town hall requests, Briar Hill Church, etc.</i>	1 Year after event ends	P/E		<input type="checkbox"/>

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CEMETERY

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
C-01	Burial/Cremation Permits & Payment Receipts	7 Years	P/E		X
C-02	Burial Information Request Form	7 Years	P/E		<input type="checkbox"/>
C-03	Deeds & Lot Records- <i>Includes all deeds and old cemetery plot mapping</i>	Permanent	P/E		X ✓
C-04	Foundation Request Forms	7 Years	P/E		<input type="checkbox"/>
C-05	Indigent Burials- <i>documents burial expenses paid by the township for an individual who lacks the funds to do so</i>	Permanent	P/E		X ✓
C-06	Legal Opinions- <i>Opinions from Legal Counsel, correspondence to legal counsel</i>	Permanent	P/E		<input type="checkbox"/> ✓
C-07	Lot Purchase Forms	Permanent	P/E		<input type="checkbox"/> ✓
C-08	Miscellaneous – Letters, Price Lists, etc.	Until superseded or UNLAN	P/E		<input type="checkbox"/>
C-09	Receipts- <i>from purchase of plots, foundations, etc.</i>	3 Years, provided audited	P/E		<input type="checkbox"/>

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FD-21	Hydrant Maintenance Records – <i>Contains repairs of hydrants, location, cause of damage and company making repairs.</i>	7 years after test date	P/E		<input type="checkbox"/>
FD-22	Incident Reports – <i>Contains situation found and action taken, address, owner, fire origin, number of engines, building structure, officer in charge, date, time and alarm time</i>	21 years provided no action taken	P/E		<input type="checkbox"/>
FD-23	Insurance Claim Files	10 years after final settlement	P/E		<input type="checkbox"/>
FD-24	Open Burning – <i>Contains EPA applications, permits and violations</i>	7 years after violation corrected	P/E		<input type="checkbox"/>
FD-25	Personnel – <i>Contains applications, disciplinary sheets</i>	Per Russell Twp PPM	Paper		<input type="checkbox"/>
FD-26	Public Education Records – <i>CPR/LNB</i>	7 years	Paper		<input type="checkbox"/>
FD-27	Radio/Phone Calls Audio Recording Tapes	30 days, erase and reuse provided no action pending	E		<input type="checkbox"/>
FD-28	Training Materials Files	Until superseded	P/E		<input type="checkbox"/>
FD-29	Training Records – <i>Contains employee's name, rank training received, certification, dates, instructor and grade</i>	Permanent	P/E		<input type="checkbox"/>
FD-30	Truck Mileage and Fuel Records	Life of vehicle	P/E		<input type="checkbox"/>
FD-31	Violation Notices – <i>Contains address, date, owner, violation, time allowed to correct, re-inspection date, inspector</i>	7 year after violation corrected	P/E		<input type="checkbox"/>

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FISCAL OFFICE

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
F-01	Accounts Payable Record – <i>accounting entry representing an entity's obligation to pay off a short-term debt</i>	3 years, provided audited	P/E		<input type="checkbox"/>
F-02	Accounts Receivable Record – <i>accounting of receivable financial accounts including supporting documents</i>	3 years, provided audited	P/E		<input type="checkbox"/>
F-03	Affordable Care Act Documentation- <i>includes counts, calculations, submissions, reports, and submittals</i>	10 years	P/E		<input type="checkbox"/>
F-04	Appropriations – <i>work papers</i>	3 years	P/E		<input type="checkbox"/>
F-05	Appropriation Transfers	3 years	P/E		<input type="checkbox"/>
F-06	Annual Certificate of Estimated Resources- <i>Issued by the County</i>	5 years	P/E		<input type="checkbox"/>
F-07	Annual Financial Report- <i>A written report which quantitatively describes the financial health of the township.</i>	Permanent	P/E		X ✓
F-08	Annual Report to Auditor of State- <i>report compiled representing the financial status of the township</i>	5 years	P/E		<input type="checkbox"/>
F-09	Annual Township Appropriation Resolution- <i>An itemized forecast of the township's income and expenses expected for a specific year.</i>	Permanent (at 50 years appraise for historical value)	P/E		X ✓
F-10	Auditor of State- <i>A qualified entity at the federal/state level that conduct audits</i>	5 years	P/E		<input type="checkbox"/>
F-11	Audit Reports - <i>includes fund status, revenue status, revenue receipt register, payment listing, cash journal, appropriation status, cash summary by fund, and Certificate of Deposit reports.</i>	5 years, provided audited	P/E		<input type="checkbox"/>
F-12	Bad Check or Bad Debt Records- <i>A method of payment in which insufficient funds are demonstrated</i>	2 years after payment or settlement	P/E		<input type="checkbox"/>
F-13	Bank Deposit Records (Receipts from banking institution, Deposit Slips) <i>Records of all transactions, deposits and withdrawals.</i>	3 years provided audited	P/E		<input type="checkbox"/>
F-14	Bids – Successful - <i>documentation of the lowest and accepted best bid</i>	15 years after completion of project	P/E		<input type="checkbox"/>
F-15	Bids – Unsuccessful - <i>documentation of bids that were not the lowest and best bid</i>	2 years after awarding of the contract	Paper		<input type="checkbox"/>
F-16	Block Grant Documentation- <i>grants from central government that the township allocates for specific purposes</i>	5 years	P/E		<input type="checkbox"/>

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F-17	Bodily injury to non-employee- <i>damage due to a physical impact or accident (held by insurance company)</i>	5 years provided no action pending	P/E		<input type="checkbox"/>
F-18	Bond – <i>Performance Bond</i>	After project successfully completed & accepted	P/E		<input type="checkbox"/>
F-19	Budgets- <i>Budget worksheets, submissions, printouts, etc.</i>	10 years	P/E		<input type="checkbox"/>
F-20	Canceled Checks- <i>checks that have cleared the depositor's account and has been marked as "canceled" by the bank</i>	3 years, provided audited	P/E	Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C.	<input type="checkbox"/>
F-21	Cash Reports- <i>a method analyzing the township's statements and reports.</i>	3 years	P/E		<input type="checkbox"/>
F-22	Cash Receipts and Disbursements	3 years, provided audited	P/E		<input type="checkbox"/>
F-23	Checking Account Statements/Certificates of Deposit Statements- <i>a financial accounting of financial transactions made from the checking account or CD transactions.</i>	3 years, provided audited	P/E		<input type="checkbox"/>
F-24	Checks – Voided - <i>A check rendered null and void for any purpose</i>	3 years, provided audited	P/E		<input type="checkbox"/>
F-25	Contractors' Prevailing Wage Records- <i>documents prevailing wage rates as determined by actual hours worked, for a particular occupational title (classification/trade) specific to the county and state requirements</i>	5 years	P/E		<input type="checkbox"/>
F-26	Computer Generated Financial Reports- <i>check register, revenues, expenses, journal entries</i>	3 years provided audited	P/E		<input type="checkbox"/>
F-27	Insurance Claims	5 years after closed	P/E		<input type="checkbox"/>
F-28	Encumbrance and Expenditure Journal <i>A record of the funds that are required to spend on a stated thing in the future</i>	3 years, provided audited	P/E		<input type="checkbox"/>
F-29	Equipment & Vehicle Records	6 months after sold	P/E		<input type="checkbox"/>
F-30	Excavation Permits - <i>Issued permits for excavations within the Township limits.</i>	3 years, provided audited.	P/E		<input type="checkbox"/>
F-31	General Ledger - <i>a general collection of financial accounts</i>	25 years	P/E		<input type="checkbox"/>

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F-32	Grant Files - Not Funded - <i>financial assistance from an agency awarded on specific criteria which were not funded</i>	1 year after decision rendered	P/E		<input type="checkbox"/>
F-33	Grant Files/Records - Federal/State- <i>financial assistance from an agency awarded on specific criteria</i>	5 years if audited and disputes resolved	P/E		<input type="checkbox"/>
F-34	Insurance Policies - <i>guarantee of compensation for specified loss, damage, illness, or death, etc. in return for payment</i>	2 years after expiration, provided all claims settled	P/E		<input type="checkbox"/>
F-35	Pay-In Records	3 years, provided audited	P/E		<input type="checkbox"/>
F-36	Property Inventories - <i>list of property with corresponding values and initial costs often used to substantiate insurance claim</i>	Continuously updated, until superseded	P/E		<input type="checkbox"/>
F-37	Purchase Orders & Blanket Certificates	3 years - provided audited	P/E		<input type="checkbox"/>
F-38	Quotes - Approved Unapproved	2 years 1 year	P/E		<input type="checkbox"/>
F-39	Receipts - <i>Book of all Township receipted transactions.</i>	3 years, provided audited.	P/E		<input type="checkbox"/>
F-40	Receipts and Expenditures Report to Auditor of State - <i>explanation, format, and example of income and expenditure account.</i>	3 years	P/E		<input type="checkbox"/>
F-41	Reconciliation Sheets, Bank Accounts, Bank Statements, Investment Activity - <i>comparison of the bank statement(s) and township records to ensure they are in agreement.</i>	3 years, provided audited	P/E		<input type="checkbox"/>
F-42	Requisitions - <i>Submitted by departments to Fiscal Office for purpose of purchasing goods/services.</i>	3 years, provided audited.	P/E		<input type="checkbox"/>
F-43	Special Assessments/Tax Assessments	3 years, provided audited	P/E		<input type="checkbox"/>
F-44	Surety Bonds of Officials or Employees - <i>a promise to pay one party a certain amount if a second party fails to meet the obligation, such as fulfilling the terms of a contract</i>	10 years after expiration	P/E		<input type="checkbox"/>
F-45	Travel Expense Records - <i>receipts from township related travel.</i>	3 years, provided audited.	P/E		<input type="checkbox"/>

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F-46	Uniform Allowance Record - <i>a specific amount granted for the purchase of distinctive clothing worn by specific departments i.e. police & service personnel</i>	3 years, provided audited	P/E		<input type="checkbox"/>
F-47	Vouchers/Warrants/Invoices	3 years, provided audited	P/E		<input type="checkbox"/>

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HUMAN RESOURCES/PAYROLL

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
HR-01	Application for Employment – formal request for employment: <ul style="list-style-type: none"> • <i>Hired – employed by the Township</i> • <i>Not Hired – person not hired to work for the township</i> 	Personnel file 2 years	P/E		<input type="checkbox"/>
HR-02	Application for PERS Refund or Waiver – a form in which an employee requests funds be returned or waived from withholding of Public Employees Retirement System	Permanent – personnel file	P/E	Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C.	<input type="checkbox"/>
HR-03	Bi-Weekly Payroll Journal – accounting of weekly and salaries and wages, including year-to-date balances.	3 Years, provided audited	P/E		<input type="checkbox"/>
HR-04	Bureau of Workers' Compensation Reports and BWC Third Party Administrator Reports- i.e. CareWorksComp, Frank Gates	2 years	P/E		<input type="checkbox"/>
HR-05	CDL & Regular Drug Screening	3 years, provided audited	P/E		<input type="checkbox"/>
HR-06	Commendation, Promotions – an award or advancement of an employee's rank or position	Personnel file	P/E		<input type="checkbox"/>
HR-07	Continuing Education Certifications/Seminar	Personnel file	P/E		<input type="checkbox"/>
HR-08	Court Orders for Payroll Deduction/Garnishments – direction issued by a court or a judge requiring the employer to withhold funds to pay for something the court mandated	Until employee terminates or order rescinded	P/E		<input type="checkbox"/>
HR-09	Employee Performance Evaluation – record of an employee's achievements, etc.	Personnel file	P/E		<input type="checkbox"/>
HR-10	Employee Sick Leave and Vacation Balances – record of sick time taken, vacation time taken and balances available	Continually updated; 3 years, provided audited	P/E		<input type="checkbox"/>
HR-11	Employee Withholding Requests – written request for exemptions, taxes, etc.	Until superseded or revoked by employee	P/E		<input type="checkbox"/>
HR-12	Injury Report – record of an incident of accident involving employee	6 years	P/E		<input type="checkbox"/>
HR-13	Insurance Enrollment Record – enrollment packet for Township provided health, life, dental, and vision insurance.	1 year after employee leaves township	P/E		<input type="checkbox"/>

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HR-14	Job Descriptions – <i>a written account of what a particular job entails</i>	Until superseded	P/E		<input type="checkbox"/>
HR-15	Letter of Appointment – <i>a written document authorizing the hire of an individual</i>	Personnel file	P/E		<input type="checkbox"/>
HR-16	Letters of Reference – <i>a written letter provided for an employee by people who are familiar with his or her work or character and who have positive remarks to make</i>	2 years after hired	P/E		<input type="checkbox"/>
HR-17	Letter of Resignation – <i>written to announce the employees intent to leave a position currently held</i>	Personnel file	P/E		<input type="checkbox"/>
HR-18	Motor Vehicle Reports	2 years	P/E		<input type="checkbox"/>
HR-19	Quarterly Federal Tax Return – <i>The tax form or forms used to file income taxes with the Internal Revenue Service filed on a quarterly basis</i>	10 years, provided audited	P/E		<input type="checkbox"/>
HR-20	OPERS PEDACKN Form	Permanent	Paper		<input type="checkbox"/>
HR-21	Personnel Actions – documents official position and employee transactions or any action taken regarding an employee or position	Personnel file	P/E		<input type="checkbox"/>
HR-22	Personnel File - documentation of the history and status of the entire employment relationship with an individual employee	Permanent	P/E		<input type="checkbox"/>
HR-23	Pre-employment Testing – <i>New Hires</i>	6 months following completion of probation	P/E		<input type="checkbox"/>
HR-24	Pre-employment Testing – <i>Current Employees and Non-Hires</i>	30 days	P/E		<input type="checkbox"/>
HR-25	Promotion Actions – <i>actions taken upon the award or advancement of an employee's rank or position</i>	Personnel file	P/E		<input type="checkbox"/>
HR-26	Record of Disciplinary Action – <i>action taken to discipline an individual</i>	Personnel file	P/E		<input type="checkbox"/>
HR-27	Reimbursement Requests and Tracking – <i>uniform, cell phones, travel, etc</i>	3 years, provided audited	P/E		<input type="checkbox"/>
HR-28	Reports to Bureau of Employment Services – <i>written record to the Bureau providing information regarding the employment</i>	2 years	P/E		<input type="checkbox"/>
HR-29	Reports to Retirement Systems – <i>plans for setting aside money to be spent after retirement – pension accounts, pension plans, retirement account, etc.</i>	50 years	P/E		<input type="checkbox"/>

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
HR-30	Retirement paperwork-Applications and verifications, including retire/rehire paperwork.	Permanent-Personnel file	P/E		<input type="checkbox"/>
HR-31	State Income Tax Report – report of tax levied and paid to the state sources out of wages	25 years	P/E	Audited means: the years encompassed by the records	<input type="checkbox"/>
HR-32	Timesheets – method of recording the amount of a workers time spent on the job, including work schedules and time logs.	3 years, provided audited	P/E	have been audited by the Auditor of State and the audit report has been released pursuant to	<input type="checkbox"/>
HR-33	Training Certificates of Completion	Personnel File	P/E	Sec. 117.26 O.R.C.	<input type="checkbox"/>
HR-34	Unemployment Compensation Case Files – complete documentation including funds issued for wages or salary paid to recently unemployed worker(s)	4 years after date of final payment	P/E		<input type="checkbox"/>
HR-35	Vacation Time Requests/Vacation Buy-Backs and Overtime and Compensatory Time Request/Payment Request	3 years, provided audited	P/E		<input type="checkbox"/>
HR-36	Vendor Packets- includes Hold Harmless Agreement and Certificates of Liability Insurance	3 Years after project completion	Paper		<input type="checkbox"/>
HR-37	Withholding payment record – record of what has been withheld from employee(s) pay	3 years, provided audited	P/E		<input type="checkbox"/>
HR-38	W-2 Forms – IRS forms used to report wages tips, other compensation, withheld income and social security taxes, etc.	10 Years	P/E		<input type="checkbox"/>
HR-39	W-4 Forms and State Form IT-4 – IRS tax forms and Ohio State tax forms that are used by taxpayers and tax-exempt organizations to report financial information to the Internal Revenue Service and the State.	Until superseded or employee terminates	P/E		<input type="checkbox"/>
HR-40	Worker's Compensation Case Files – files containing information about the origin of the accident or injury including wages and medical expenses of an employee who is injured on the job	10 years after date of final payment	P/E		<input type="checkbox"/>
HR-41	Year to Date Report - includes yearly withholdings and earnings				
HR-42	1099 Forms	10 Years, Filed with W-2 Forms	P/E		<input type="checkbox"/>
HR-43	W-9 Forms	Until superseded or vendor is no longer used.	P/E		<input type="checkbox"/>

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LEGAL RECORDS

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
L-01	Case Files, Civil	10 years, provided no action pending	P/E		<input type="checkbox"/>
L-02	Case Files, Criminal	20 years, provided no action pending	P/E		X ✓
L-03	Easements	Permanent	P/E		X ✓
L-04	Legal Notices & Sunshine Notices - <i>proofs of notices published in newspaper.</i>	5 years	P/E		<input type="checkbox"/>
L-05	Legal Opinions from Legal Counsel	Permanent	P/E		X ✓
L-06	Township Property Files	Permanent	P/E		<input type="checkbox"/> ✓

PARKS

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
PD-01	Registrations - <i>an official registering one's intent to use the park for an event or for participation in a township sponsored event</i>	3 years provided no claim pending	P/E		<input type="checkbox"/>
PD-02	Event Planning - <i>written or typewritten details of the planning of an event or the meetings held for the planning of an event</i>	UNLAN	P/E		<input type="checkbox"/>
PD-03	Flyers - <i>an announcement intended for wide circulation containing information about the event, program, etc.</i>	UNLAN	P/E		<input type="checkbox"/>
PD-04	Plans of park property - <i>detailed design/layout of the property</i>	Permanent	P/E		X ✓

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POLICE

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
P-01	Administrative and General Electronic Correspondence	Administrative email correspondence, not relating to a specific case file, will be stored in a file, on site, for a minimum of 30 days	Multi		<input type="checkbox"/>
P-02	Arrest Cards (Adult): <i>Contains all information on arrest including: Incident Number, date, time, offense, officer, name of subject, location and disposition</i>	Until age 80 years or deceased	Paper		<input type="checkbox"/>
P-03	Arrest Cards (Juvenile): <i>Contains all information on arrest including: Incident Number, date, time, offense, officer, name of subject, location and disposition</i>	Until person turns 18 or expungement order received from Court	Paper		<input type="checkbox"/>
P-04	Arrest Records (Adult) OVI Case files: <i>Court files of OVI cases including Alcohol Influence Reports, Breath/Blood Test Results, Statements of Facts by Arresting Officer, Accident Reports and Driving Records</i>	Permanent	Multi		<input type="checkbox"/>
P-05	Arrest Records (Adult) Criminal Case Files – <i>Felonies</i>	20 years	Multi		<input type="checkbox"/>
P-06	Arrest Records (Adult) Criminal Case Files - Misdemeanors	7 years	Multi		<input type="checkbox"/>
P-07	Arrest Records (Juvenile) All Case Files	Until age 18 years or expungement order received from Court	Multi		<input type="checkbox"/>
P-08	Breathalyser Records (OAC 3701-53-01)	5 years	Paper		<input type="checkbox"/>
P-09	Child Abuse Case Records	Permanent	Multi		<input type="checkbox"/>
P-10	Critical Case Files – Homicides and Suicides	Permanent	Multi		<input checked="" type="checkbox"/>
P-11	Electronic Correspondence Relating to Specific Cases	Email correspondence pertaining to a specific case will be printed and stored in the case file and will be retained in accordance with the Records Retention Policy regulations for that particular case file	Multi		<input type="checkbox"/>

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Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
P-12	Equipment Inventories	3 years	Multi	Audited means: the years encompassed by the record have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C.	<input type="checkbox"/>
P-13	Firearms Records and Inventory	5 years, provided audited	Multi		<input type="checkbox"/>
P-14	In-Car Police Audio/Video - Non-evidentiary - Evidentiary	Automatically every 60 days, No RC3 required Keep as long as case file retained	Audio/Video Audio/Video		<input type="checkbox"/>
P-15	Incident Reports	7 years	Multi		<input type="checkbox"/>
P-16	Investigations (All)	10 years	Multi		<input type="checkbox"/>
P-17	Master Name Index	Permanent	Multi		<input checked="" type="checkbox"/>
P-18	Missing Person Reports	20 years, or until found	Multi		<input type="checkbox"/>
P-19	Prisoner Booking Video Recording Tapes	Automatically every 90 days, No RC3 required	Audio/Video		<input type="checkbox"/>
P-20	Proficiency Exams	3 years	Multi		<input type="checkbox"/>
P-21	Special Attention – Property/Vacation Watch	1 year after expiration	Multi		<input type="checkbox"/>
P-22	Traffic Crash Reports	5 years Provided no claim pending	Multi		<input type="checkbox"/>
P-23	Traffic Citations/Warnings	3 years	Multi		<input type="checkbox"/>
P-24	Tow Sheets	3 years	Multi		<input type="checkbox"/>
P-25	Training Records	Merge with personnel records	Multi		<input type="checkbox"/>
P-26	Vehicle Maintenance Records	Until vehicle is sold	Multi		<input type="checkbox"/>

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ROAD DEPARTMENT

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
R-01	Blueprints, Maps and Plans	Life of infrastructure	P/E		<input checked="" type="checkbox"/>
R-02	Equipment Records	5 years	P/E		<input type="checkbox"/>
R-03	Index of Roads	Permanent	P/E		<input checked="" type="checkbox"/>
R-04	Road Program and Maintenance Records	5 years after completion of project	P/E		<input type="checkbox"/>
R-05	Storm Water Management Records	10 years	P/E		<input type="checkbox"/>
R-06	Street Repair Record	3 years	P/E		<input type="checkbox"/>
R-07	Trash Day Records	5 years	P/E		<input type="checkbox"/>
R-08	Vehicle Maintenance Records	Until vehicle sold	P/E		<input type="checkbox"/>

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ZONING

Schedule Number	Record Title and Description	Retention Period	Media Type	For use by Auditor of State or OHS-LGRP	RC-3 Required by OHS-LGRP
Z-01	Appeals on Interpretation of Code	Permanent	P/E		X ✓
Z-02	Complaints	2 years, provided no action pending	P/E		<input type="checkbox"/>
Z-03	Comprehensive Land Use Guide Plan	Permanent	P/E		<input checked="" type="checkbox"/>
Z-04	House Number Record – Facility Files	Permanent	P/E		X ✓
Z-05	Inspection Reports	5 years	P/E		<input type="checkbox"/>
Z-06	Outdated Zoning Maps	20 years	P/E		<input type="checkbox"/>
Z-07	Permits - Zoning Permits - All Other Permits	Permanent 3 years provided audited	P/E		<input checked="" type="checkbox"/> (Zoning) <input type="checkbox"/>
Z-08	Variance Requests	Permanent	P/E		<input checked="" type="checkbox"/>
Z-09	Zoning Plans - Residential - Commercial - Township owned	3 years 5 years Life of structure, appraise for historical value	P/E		<input type="checkbox"/>
Z-10	Zoning Resolution	Until superseded, retain 1 copy permanently	P/E		<input checked="" type="checkbox"/>
Z-11	Zoning Resolution Amendments	Permanent	P/E		<input checked="" type="checkbox"/>

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C.