

Retention, Management, and Disposal of Records

For the School to operate efficiently, the School must effectively manage its records. To accomplish this goal and to comply with Ohio law, the School has established a Record Commission.

The Records Commission shall include of the President of the Governing Authority, the Fiscal Officer, and the Head Administrator. The Records Commission shall meet at least once every twelve months. The Records Commission has the authority and the discretion to appoint records officers who shall perform the necessary work associated with the storage, retention, and disposal of records.

Schedule of Records Retention and Disposition

The Records Commission shall create and adopt a Schedule of Records Retention and Disposition (“Schedule”) (Form RC-2), which classifies different types of School records and designates an appropriate retention period for each. The Schedule suggested by the Ohio Historical Society is hereby included as Form No. **1743.1**. The Records Commission has the authority to review and revise this Schedule as necessary.

After adopting a Schedule or revising a schedule, the Records Commission shall forward the Schedule to the Ohio Historical Society. The Records Commission shall keep a copy of the Schedule. The Schedule shall become effective upon approval by the Ohio Historical Society and the State Auditor.

Certificate of Records Disposal

Prior to disposing any School records, the members of the Records Commission, or the records officers, if any, shall submit to the records commission a Certificate of Records Disposal (“Certificate”) (Form RC-3). An example of the Certificate may be found at Form No. **1743.2**. The submitted Certificate(s) shall list records that are eligible for disposal pursuant to the Schedule. The records commission shall meet at least once each year to review the submitted Certificates. Following approval of the Certificate(s) by the records commission, the guidelines stated below shall be adhered to.

- The records commission shall make a copy of all approved Certificates and shall maintain these copies for its records.
- The original Certificate(s) shall be forwarded to the Ohio Historical Society Network Specialist for the county in which the School is located no later than fifteen (15) days prior to the proposed disposal date. The records commission does not need to send a copy of the Certificate(s) to the State Auditor’s office. The Ohio Historical Society Network Specialist shall send a copy.
- The Records Commission shall wait at least fifteen (15) days after forwarding the Certificates to the Ohio Historical Society Network Specialist before disposing of the indicated records. During this time period, the records commission may be notified that the proposed disposal is inappropriate or that the Ohio Historical Society considers some or all of the documents to have continuing historical value and wishes, therefore, to take custody

of them. The Ohio Historical Society may not review or select for its custody any of the following:

- Records containing personally identifiable information concerning any student, without the written consent of the parent, guardian, or custodial of each such student who is less than eighteen (18) years of age, or without the written consent of each student who is eighteen (18) years of age or older.
- Records, the release of which would, according to the “Family Educational Rights and Privacy Act of 1974,” 88 Sta. 571, 20 U.S.C.A. 1232g, qualify disqualify a school or other educational institution from receiving federal funds.
- At the end of the fifteen (15) day period, any records which have not been opposed to or taken custody of may be disposed. The Fiscal Officer, serving as secretary of the records commission, shall arrange for the appropriate disposal of such documents.

E-mails and Other Correspondence

E-mails and other forms of correspondence are not considered a record. Instead, these messages should be categorized, retained, stored, and disposed of based upon the contents of each email or other form of correspondence. As suggested by the Ohio Historical Society, e-mail correspondence can be grouped into four (4) different categories:

Not an Official Record. If an e-mail or correspondence does not document the organization, functions, policies, decisions, procedures, operations, or other activities of the School, it is not considered a “record” and, therefore, may be deleted immediately. Examples of non-records include personal messages as well as publications, promotional items, and similar materials (unless it is part of a larger material that is considered a record).

Official Record of Transient Retention. If an e-mail or other correspondence serves a limited administrative value, then it shall be retained only until it no longer serves its limited administrative purpose. Examples of official records of transient retention include messages regarding upcoming meetings and messages which substitute for verbal conversation, as might otherwise occur in the hallway or on the telephone. Official records of transient retention do not discuss policy or establish guidelines.

Official Record of Intermediate Retention. Official records of intermediate retention are those records considered general or routine correspondence. Routine correspondence includes referral letters and requests for routine information and shall be retained for a period of six (6) months. General correspondence includes informative letters and memos pertaining to agency and legal interpretations and shall be retained for a period of one (1) year.

Official Record of Long-Term Retention. Official records of long-term retention are those records which discuss policy, create rules or guidelines, or otherwise deal with significant administrative duties and responsibilities. These records shall be retained according to the Schedule as adopted by the Governing Authority.

E-Mail Storage

E-Mails may be stored in the following formats:

- on-line storage, where the e-mail is maintained in the e-mail system;
- near-line storage, where the message is stored in an electronic record-keeping system; and

- off-line storage, where the message is physically printed and stored accordingly.

In order to assure that all necessary e-mails records are preserved, one of the following guidelines shall be adopted:

- the individual who sends the e-mail is responsible for its retention. If an e-mail is received from outside the School, any individual who receives the e-mail is responsible for its retention.
- a special mailbox is created, and each time an e-mail is sent, the sender shall send a carbon copy (cc) to said mailbox. The party charged with administering the mailbox, such as the IT department, shall retain the e-mails as necessary.

Ohio: R.C. 149.41.

Cross Reference: Policy No. **1741**, Public Records Access Policy; Policy No. **1742**, Internet Public Record Redaction Policy; Policy No. **3833**, Tracking Missing Children; Policy No. **3831**, Student Records and Release of Information; Policy No. **5810**, Personnel Records File; Form No. **1743.1**, Schedule of Records Retention and Disposition; Form No. **1743.2**, Certificate of Records Disposal.

Schedule of Records Retention and Disposition

The School has adopted the forms provided by the Ohio Historical Society. The Record retention forms are available on the Ohio Historical Society's website:

<https://www.ohiohistory.org/OHC/media/OHC-Media/Learn/Archives-Library%20Documents/School-Retention-Suggested-Schedule.pdf>



Section A: Local Government Unit

- Include the name of the municipality, county, township, school, library, or special taxing district (local government entity) for which the form is being submitted.
- Include the unit (department, agency, office), if applicable.
- The departmental official directly responsible for the records must sign and date the form.

Section B: Records Commission

- Complete the phone number and mailing address for the Records Commission, including the county.
- To have this form returned to the Records Commission electronically, include an email address. It is the responsibility of the Records Commission to forward an electronic or paper copy of the approved form to the appropriate department.
- The Records Commission Chairperson must sign the certification statement before it can be reviewed and signed at the Ohio Historical Society by the Local Government Records representative and approved by the Auditor of State's Office.

Section C: Ohio Historical Society – State Archives

- The reviewing agent from Ohio Historical Society Local Government Records Program (OHS-LGRP) will indicate on your RC-2 which records series will require a Certificate of Records Disposal (RC-3) prior to disposal.
- They will sign the form and forward it to the Auditor of State's Office.

Section D: Auditor of State

- The approving agent at the Auditor of State's office will sign the form and return it to the OHS-LGRP.

Section E: Records Retention Schedule

- 1) Schedule numbers can be expressed by a year and item numbering scheme for each records series being scheduled, for example, 09-1 and 09-2. Another option is to include a unique abbreviated identifier for each office, for example, Eng. [Engineer] 1, Eng. 2, etc. The numbering schema is your choice, and it will be used later on your Certificate of Records Disposal (RC-3).
- 2) Include the title of the records series and a brief description of each series. Please provide information about the content and use of the records series.
- 3) Articulate a retention period for the record in terms of time (exp. six years), an action (exp. until audited), or both (six years after audit).
- 4) Include the formats of the record (paper, electronic, microfilm, etc.)
- 5) For use by the Auditor of State or the OHS-LGRP. OHS-LGRP will mark the records series that will need an RC-3 prior to disposal.

GENERAL INSTRUCTIONS:

--- For questions related to records scheduling and disposition, OHS-LGRP: (614) 297-2553 or at localrecs@ohiohistory.org

--- After completing sections A and E, submit the form to your records commission so it can be approved in an open meeting pursuant to Section 121.22 ORC. See Ohio Revised Code Section 149.38 (counties), 149.39 (municipalities), 149.41 (school districts), 149.411 (libraries), 149.412 (special taxing districts) and 149.42 (townships) for the composition of your records commission. Your records commission completes section B and sends the form to OHS-LGRP at:

localrecs@ohiohistory.org OR The Ohio Historical Society
State Archives of Ohio
Local Government Records Archivist
800 E. 17th Avenue
Columbus, OH 43211-2497

--- The OHS-LGRP will review this RC-2 and forward it to the Auditor of State's Records Officer, Columbus.

--- This RC-2 is in effect when all signatures have been affixed to it. OHS-LGRP will return a copy of the approved form to the Records Commission. *The local records commission and the originating office should retain permanent copies of the form to document legal disposal of public records.*

--- Remember, at least 15 Business days before you intend to dispose of records, submit a Certificate of Records Disposal (RC-3) to the OHS-LGRP. Copies of RC-3s will not be returned.



For State Archives - LGRP Use Only	
Date Reviewed:	_____
Form Scanned:	_____

RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

(local government entity)

(unit)

(signature of responsible official)

(name)

(title)

(date)

Section B: Records Commission

Records Commission

(telephone number)

(address)

(city)

(zip code)

(county)

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

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.

Records Commission Chair Signature

Date

Section C: Ohio Historical Society - State Archives

Signature

Title

Date

Section D: Auditor of State

Signature

Date

<p>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</p>



Section E: Records Retention Schedule

(local government entity)

(unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
1000	<u>GOVERNING AUTHORITY AND ADMINISTRATIVE RECORDS</u>				<input type="checkbox"/>
1101	Minutes Treasurer	Permanent			<input type="checkbox"/>
1101.1	Audio Tapes Treasurer	2 years			<input type="checkbox"/>
1102	Blue Prints, Plans, Maps Business Office & Secretary	Permanent			<input type="checkbox"/>
1103	Deeds, Easements, Leases Treasurer	Permanent			<input type="checkbox"/>
1104	Governing Authority Policy Books and Superintendent Other Adopted Policies and Secretary	1 year after superseded			<input type="checkbox"/>
1105	Administrative Regulations Superintendent and Secretary	1 year after superseded			<input type="checkbox"/>
1106	Court Decisions Treasurer	Permanent			<input type="checkbox"/>
1107	Claims and Litigation Treasurer	Permanent			<input type="checkbox"/>
1201	Elections Treasurer	10 years			<input type="checkbox"/>
1202	Record Disposal forms (RC-3) Treasurer	10 years			<input type="checkbox"/>
1203	Bargaining Agreements Treasurer	10 years after expiration			<input type="checkbox"/>
1204	Budget Policy Files Treasurer	5 years			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
1301	Workers' Compensation Claims Treasurer	10 years after financial payment made			
1302	Bank Depository Agreements Treasurer	4 years after completion			
1303	Organization Reports Treasurer	2 years **			
1304	Governing Authority Meeting Notes Treasurer	1 year			
1305	Agendas Treasurer	1 calendar year **			
1401	Adopted Courses of Study Superintendent and Secretary	Until superseded			
1402	Adopted Special Education Programs Superintendent and Secretary	Until superseded			
1403	Adopted Special Programs Superintendent and Secretary	Until superseded			
<u>2000</u>	(Employee files include employment applications, resumes, contracts/salary notices, evaluations, personnel actions, absence certification, transcripts and any other documents which become part of the file.)				
2101	Certified Active Employees Asst. Supt., Personnel Secretary	Permanent			
2102	Classified Active Employees Asst. Supt., Personnel Secretary	Permanent			
2103	Certificated Inactive Employees Asst. Supt., Personnel Secretary	Permanent ***			
2104	Classified Inactive Employees Asst. Supt., Personnel Secretary	Permanent ***			
2105	Civil Rights, Civil Services And Disciplinary Reports Asst. Supt., Personnel Secretary	Permanent ***			



(1) Schedule Number	(2) Record Title and Description		(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
2107	Retirement Letters	Asst. Supt., Personnel Secretary	Permanent ***			
2108	Substitute records	Asst. Supt., Personnel Secretary	25 years			
2301	Employee Contracts	Treasurer	4 years after termination from employment			
2302	Professional Conference Applications	Asst. Supt., Personnel Secretary	2 years **			
2303	Irregular Employee Contracts (Substitutes, etc.)	Treasurer	4 years after contract expires			
2304	Unemployment Claims	Treasurer	5 years			
2305	Unemployment	Treasurer	5 years			
2306	Applications (not hired)	Asst. Supt., Personnel Secretary	2 years **			
2307	Schedules of Employees	Asst. Supt., Personnel Secretary	Fiscal year plus 2 years			
2308	Student Helper Applications	Asst. Supt., Personnel Secretary	2 Years			
2309	Teacher Personnel Reports (internal)	Asst. Supt., Personnel Secretary	Fiscal year plus 1 year			
2310	I-9 Immigration Verification Forms	Asst. Supt., Personnel Secretary	Termination of employment plus 1 year			
2401	Job Descriptions	Asst. Supt., Personnel Secretary	Retain until superseded or obsolete			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
3000	<u>STUDENT RECORDS</u>				
3101	Student Record Folders Bldg. Secretary Enrollment/Withdrawal Information Grades/Transcripts Activities Records Attendance Records Individual Test Results Standardized Competency/Proficiency Aptitude Intervention Records Foreign Exchange Records Suspensions/Expulsions Home Schooled Student Records	Permanent ***			
3102	Office Record Card (K-9) Bldg. Secretary	Permanent ***			
3103	Cosmetology Records Voc. Secretary (Vocational)	Permanent ***			
3201	Health/Medical Records Nurse/Bldg. Visual Screening Secretary Hearing Screening Immunization Records	7 years after graduation			
3202	Discipline Records Bldg. Secretary Letters to Parents Office Discipline	1 year after student leaves school			
3203	Psychological Records Special Ed. (Restricted) Secy/Nurse	Permanent ***			
3204	Child Abuse/Neglect Bldg. Secretary Referral Letters	Through graduation			
3301	Teacher Grade Books/ Records Bldg. Secretary	3 years **			
3302	Pre-School Screening Bldg. Secretary Profiles	3 years			
3303	Age and Schooling Records Bldg. Secretary (Work Permits)	3 years			



(1) Schedule Number	(2) Record Title and Description		(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
3304	Accident Reports	Nurse/Bldg. Secretary	5 years provided no action pending			
3305	Individual Educational Plan (IEP)	Bldg. Secretary Spec. Ed. Secy	Permanent			
3306	Free/Reduced Price Lunch Application	Bldg. Secretary	4 years			
3401	Emergency Information	Bldg. Secretary	Until superseded			
<u>4000</u>	<u>BUILDING RECORDS</u>					
4202	Tornado and Fire Drill Records	Bldg. Secretary	1 year *			
4203	Building Health Inspections	Bldg. Secretary	2 years *			
4301	Student Activity Records Pay-in forms Pay-out forms Account forms/Dist. Budget forms Requisitions Purchase orders Ticked sale reports	Bldg. Secretary	2 years **			
4302	Receipts/Deposit Slips	Bldg. Secretary	4 years **			
4303	Budget/Appropriation Records	Bldg. Secretary	4 years **			
4304	Requisitions/ Purchase Orders	Bldg. Secretary	10 years **			
4401	Textbook Inventories	Bldg. Secretary	Until superseded			
4402	Supplies Inventory	Bldg. Secretary	Until superseded			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
4403	Student Handbooks Bldg. Secretary	Until superseded			
4404	Yearbooks Bldg. Secretary	Permanent			
4405	Security Tapes Bldg. Secretary	Permanent			
5000	<u>CENTRAL DEPARTMENTAL RECORDS</u>				
	<u>Administrative Offices</u>				
5201	School Calendars Supt. Secretary	5 years			
5301	Repair, Installation and Maintenance Records Business Office and Secretary	4 years **			
5302	Prevailing Wage Records Business Office and Secretary	4 years **			
5303	Rental Information (Use of Facilities) Business Office and Secretary	4 years **			
5304	Work Orders Business Office and Secretary	4 years **			
5305	Environmental Reports and Data (asbestos, etc.) Business Office and Secretary	4 years **			
5306	Vandalism Reports Business Office and Secretary	4 years **			
5307	Student Activity Purpose Clauses Business Office and Secretary	4 years **			
5308	Sales Potential Forms (Student Activities) Business Office and Secretary	4 years **			
5309	Bids and Specifications (Unsuccessful) Business Office and Secretary	1 year **			
5310	Bids and Specifications (Successful) Business Office and Secretary	4 years after completion of Project **			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
	<u>Administrative Offices - Continued</u>				
5311	Contractor Files (Resolutions, additions, drawings, etc.) Business Office and Secretary	Until project complete, if no action pending**			
5401	Preventive Maintenance Reports Business Office and Secretary	Fiscal year plus 2 years			
5402	Warranty/Guarantee Business Office and Secretary	Life/warranty of equipment			
5403	Plant and Equipment Inventory Business Office and Secretary	Until superseded **			
5404	Textbook/Workbook Inventory Curriculum Dir. and Secretary	Until superseded **			
5405	Supplies Inventory Business Office and Secretary	Until superseded **			
	<u>Special Education Department</u>				
5221	Special Education Tutoring Reports Special Ed. Secretary	10 years			
5222	Individual Educational Plan (IEP) Special Ed. Secretary	Permanent***			
5223	Psychological Records (Restricted) Special Ed. Secretary	Permanent***			
	<u>Transportation Department</u>				
5340	Driver Physical Transportation Secretary	2 years after termination			
5341	Fuel Consumption Data Transportation Secretary	4 years **			
5342	Transportation Records Transportation Secretary	4 years **			



(1) Schedule Number	(2) Record Title and Description		(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
5343	Field Trip Forms and Volunteer Driver Forms	Transportation Secretary	Fiscal year plus 2 years			
5441	Accident Reports	Transportation Secretary	3 years provided no action pending			
5442	Vehicle Registration	Business Office Secretary	Life of vehicle			
5443	Vehicle License	Business Office and Secretary	1 year after termination			
5445	Driver Certifications	Transportation Secretary	1 year after termination			
5446	Supplies Inventory	Transportation Secretary	Until superseded **			
5447	Vehicle Defect Report	Transportation Secretary	Life of vehicle			
5448	Bus Video Tapes	Transportation Secretary	Permanent			
	<u>Food Service Department</u>					
5561	Food Service Records Menus Food Production Milk Sold Students Served	Cafeteria Supervisor	4 years **			
5562	Lunchroom Records Cash Register Tapes Cashier's Daily Reports	Cafeteria Supervisor	4 years **			
5563	Lunchroom Reports (Free and Reduced)	Cafeteria Supervisor	4 years **			
5564	Inventories	Cafeteria Supervisor	Until superseded **			
5565	Lunchroom License	Cafeteria Supervisor	1 year after expiration			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
6000	<u>FINANCIAL RECORDS</u>				
6101	Annual Financial Reports Treasurer Appropriation Ledgers Budget Ledgers Revenue Journals Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports Financial Summary Detail Reports	5 years **			
6102	Activity Fund Cash Treasurer Journal and Ledger	5 years **			
6103	Bond Register Treasurer	20 years after issue expires			
6104	Securities Treasurer	Permanent ***			
6201	Investment Ledger Treasurer	5 years **			
6202	Foundation Distribution Treasurer	5 years **			
6203	Tax Settlements Treasurer (Semi-Annual) and Advances	5 years **			
6204	Budgets (Annual) Treasurer	5 years **			
6205	Insurance Policies Treasurer	15 years after expiration provided all claims settled			
6206	Contracts Treasurer	15 years after expiration			
6207	Bonds and Coupons Treasurer	Until redeemed**			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
6208	Accounts Payable Ledgers Treasurer	5 years **			
6209	Accounts Receivable Treasurer Ledgers	5 years **			
6210	Budget Work Papers Treasurer	5 years **			
6211	Vouchers, Invoices and Treasurer Purchase Orders	10 years **			
6212	State Program Files Treasurer Aux. Services, DPPF, Adult Vocational, Excess Lottery, Data Processing, Public/ Private Grants, etc.	10 years **			
6213	Federal Program Files Treasurer Title I, II, III, IV-B, IV-C, & VI-B; Chapter 1, 2; Drug Free, etc.	10 years **			
6214	Travel Expense Vouchers Treasurer	10 years **			
6215	Tax Anticipation Notes Treasurer (Records borrowing against future tax collections)	10 years **			
6216	State Reimbursement Treasurer Settlement Sheets	5 years **			
6217	Unemployment Claims Treasurer	5 years			
6218	Employee Bonds, Governing Authority Treasurer Member Bonds	5 years			
6219	Certificate of Estimated Treasurer Resources	15 years after expiration			
6220	Appropriation Resolutions Treasurer	5 years			
6222	Tax Apportionments Treasurer (Semi-Annual)	5 years			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
6301	Canceled Checks and Bank Settlements Treasurer	4 years **			
6302	Publication Notice Treasurer	4 years **			
6303	Tuition Fees and Payments Treasurer	4 years **			
6304	School Finance (S.F.) Monthly Statements Treasurer	4 years **			
6305	Investment Records (May include individual record of investments, bank confirmations, wire transfers, copy of CD, etc.) Treasurer	4 years **			
6306	Travel Expense Reports Treasurer	10 years **			
6307	State Sales Tax Reports Treasurer	4 years **			
6308	Student Activity Fund (Pay-ins, pay-outs, receipts/deposits, reports) Treasurer	4 years **			
6309	Check Registers Treasurer	4 years **			
6310	Deposit Slips/Cash Proofs Treasurer	4 years **			
6311	Bids and Specifications (Unsuccessful) Treasurer	1 year **			
6312	Bids and Specifications (Successful) Treasurer	4 years after completion of project			
6313	Receipt Books Treasurer	4 years **			
6314	Extra Trip Records Treasurer	4 years **			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
6315	Monthly Financial Reports Treasurer	4 years **			
6316	Accounting Data Treasurer	4 years **			
6317	Service Contracts Treasurer	4 years **			
6318	State Subsidy Reports Treasurer Applications for driver education, student transportation, special education, etc.	3 years **			
6319	Delivery/Packing Slips Treasurer	1 year **			
6401	Requisitions Treasurer	1 year *			
7000	<u>PAYROLL RELATED</u>				
7001	Payroll Ledgers Treasurer Bi-Weekly Payroll Reports, Quarterly Payroll Reports	Permanent ****			
7102	Earnings Registers Treasurer By Staff Member By Calendar Year	Permanent ****			
7103	Monthly Payroll Reports Treasurer Leave usage and accumulation, retirement service, etc.	Permanent ****			
7201	Bureau of Employment Treasurer Service Quarterly Reports	7 years			
7301	W-2's, W-4's Treasurer (Employer copy)	6 years and current **			
7302	Federal Income Tax Treasurer (Quarterly/Annual)	6 years and current **			
7303	Ohio Income Tax Treasurer (Monthly/Annual)	6 years and current **			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
7304	City Income Tax (Monthly/Annual) Treasurer	6 years and current **			
7305	School Income Tax (Monthly/Annual) Treasurer	6 years and current **			
7306	Payroll Reports Reports used for each payroll-computer generated Treasurer	4 years **			
7307	Payroll Update Listing Treasurer	4 years **			
7308	Payroll Calculations Treasurer	4 years **			
7309	State Teachers System and School Employees Retirement System Waivers Treasurer	Permanent ****			
7310	State Employees Retirement System (SERS) Reports Treasurer	4 years **			
7311	State Teachers Retirement System (STRS) Reports Treasurer	4 years **			
7312	Annuity Reports Treasurer	4 years **			
7313	Benefit Folders/Reports Treasurer	4 years **			
7314	Employee Request and/or Authorization for Leave Forms (Sick, Vacation, Personal or other leave) Treasurer	4 years **			
7315	Deduction Reports Voluntary payroll deductions Treasurer	4 years **			
7316	Employee Vacation/ Sick Leave Records Treasurer	4 years **			
7317	Time Sheets Treasurer	6 years **			
7318	Overtime Authorization Treasurer	6 years			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
7319	Employee Insurance Bills Treasurer Medical Dental Life	4 years **			
7323	Paycheck Register Treasurer	4 years **			
7324	Payroll Bank Statement Treasurer	4 years **			
7401	Deduction Authorization Treasurer	Until superseded or employee terminated			
<u>8000</u>	<u>REPORTS</u>				
8201	State Audit Reports Treasurer	5 years			
8202	#59, #659 and #4502 Treasurer	5 years			
8203	#25 and #625 Treasurer	5 years			
8204	School Finance (S.F.) Reports-annual Treasurer	5 years			
8205	Special Education (S.E.) Reports-annual Spec Ed Secy Supt Secy	7 years			
8206	Vocation Education (V.E.) Reports-annual Voc Secy Supt Secy	5 years			
8207	Ohio Common Core Data (OCCD) Reports Supt Secy	5 years			
8208	Drivers Education Reports Treasurer	5 years			
8209	Ohio Department of Education (ODE) Reports Bldg Secy	5 years			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
8211	Civil Rights Reports Supt Secy	Permanent ****			
8212	Title IX Reports Supt Secy	10 years			
8213	SM-1 & SM-2 (Annual and Quarterly) Treasurer	10 years			
8214	State Minimum Standards Supt Secy	10 years			
8301	Personnel State Reports (Currently SF-1, CS-1) Personnel Secretary	4 years **			
8302	Workers' Comp Wage Reports (Co. Auditor) Treasurer	5 years			
8303	Bank Balance Certification (Co. Auditor) Treasurer	5 years			
8304	Transportation Reports Transportation Secretary	4 years **			
<u>9000</u>	<u>OTHER</u>				
9101	Personnel Directory Supt Secy	10 years			
9102	Enrollment Record (By grade and building) Supt Secy	Permanent ****			
9202	School Calendars Supt Secy	5 years			
9203	Building, Boiler, Maintenance Reports Business Office and Secretary	2 years *			
9402	Employee Handbooks Supt Secy	Until superseded			
9403	Directives, Standards, Laws for Local, State and Federal Governmental Agencies All Secretaries	Until superseded			



(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Require d by OHS- LGRP
9404	Attendance Records	Until superseded			

- * After end of fiscal year
- ** Provided audited
- *** Hard copy maintained for 3 years after audited, then microfilmed
- **** Hard copy maintained for 5 years, then microfilmed

Certificate of Records Disposal

The School has adopted the Certificate of Records Disposal form created by the Ohio Historical Society. The form is available at the link below.

<http://www.das.ohio.gov/Portals/0/DASDivisions/GeneralServices/SPMS/pdf/ADM%203504.pdf?ver=2014-02-25-155319-773>

INSTRUCTIONS - FORM RC-3

- USE OF FORM: Serves as a notification to your local records commission and to The Ohio Historical Society/State Archives, Local Government Records Program (OHS-LGRP), that your office intends to dispose of the records listed on the form as authorized by an approved RC-2 form. It also provides an opportunity for the OHS-LGRP to select for historical records, or to provide for other disposition under Section 149.31ORC.
- WHEN TO USE: Prepare and send this RC-3 a minimum of fifteen (15) business days before the proposed disposal date.
- CERTIFICATION: This is a legal document representing compliance to the Ohio Revised Code and a commitment to maintain any microfilm master negatives according to American National Standards Institute (ANSI) Standards when the source document is listed for disposal on this RC-3. Therefore, the certification requires the signature of the official responsible for the records.
- SUBMISSION: Send the original RC-3 to: localrecs@ohiohistory.org **or** The Ohio Historical Society
State Archives of Ohio
Local Government Records Program
800 E. 17th Avenue
Columbus, OH 43211-2497
- Retain a permanent copy for your office files and send an additional copy to your records commission.

NOTE: You office or records commission will **not** receive a copy of the RC-3 back. Your office will be contacted if a record is selected for its historical value or if there are questions about the records listed on the form.

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- (1) RECORD SERIES TITLE: Record series title as shown on your retention schedule (RC-2). This information is critical for documenting the disposal; include additional descriptive information if necessary to aid in the appraisal and selection process.
- (2) AUTHORIZATION FOR DISPOSAL: Schedule number marked as needing review by OHS-LGRP as shown on your approved RC-2 and the date it was approved *by your local records commission*.
- (3) MEDIA TYPE (DESTROYED): Medium of the record series you are *disposing of*, for example, paper, film, disk, magnetic tape, optical disc.
- (4) OTHER MEDIA TYPE (RETAINED) If your government plans to *retain* the records series in another medium, list each type of medium in which it is being retained. For example: microfilm, microfiche, optical disc, electronic storage, etc.
- (5) INCLUSIVE DATES OF RECORDS Enter the time period encompassed by the records being disposed of such as: Jan. 2008 to Dec. 2008, etc.
- (6) PROPOSED DATE OF DISPOSAL Enter the proposed disposal date; the OHS-LGRP has *fifteen business days* to review the disposal form. It is recommended that a few extra days for mail delivery be included.
- (7) FOR USE BY OHS-LGRP OHS-LGRP may write clarifying notes or notes about possible records transfers.

NOTICE CONCERNING MEDIA AND FORMAT CHANGES

The Local Government Records Program strongly discourages the use of electronic formats for long-term retention of records unless the records are also maintained in an eye-readable format such as paper or microfilm. It is a responsibility of the local government to ensure the preservation and accessibility of any records retained in electronic format. For guidelines on electronic records issues, visit <http://www.ohiohistory.org/ohiojunction/erc/>.

Never use a microfilm master negative except to create a use copy from it.

For State Archives - LGRP Use Only

Date Received:

Date Reviewed:

Items requested for transfer: YES NO

If YES, attach copy of transfer form

CERTIFICATE OF RECORDS DISPOSAL (RC-3) – Part 1

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

(local government entity) (unit) (contact person) (telephone number) (location of records)

(address) (city) (zip code) (county) (date mailed to LGRP)

I hereby certify that the records listed on this RC-3 and attachments are being disposed of according to the time periods stated on the **approved Records Retention Schedules (RC-2)** listed below. No record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. In addition, microfilm created in place of any original record listed on this RC-3 will be stored according to ANSI Standards and all microfilm master negatives will only be used to create use copies. It is a responsibility of the local government to ensure the preservation and accessibility of any records retained in electronic format.

(signature of responsible official) (title) (telephone
number)

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

Please Note: The State Archives retains RC-3 forms for seven years.

It is strongly recommended that the Records Commission retain a permanent copy of this form.

CERTIFICATE OF RECORDS DISPOSAL (RC-3) – Part 2
See instructions before completing this form. Must be submitted with PART 1.

(political subdivision name)

(unit)

(1) Records Series Title	(2) Authorization for Disposal		(3) Media Type To be destroyed	(4) Media Type To be retained (if any)	(5) Inclusive Dates of Records		(6) Proposed date of destruction (15 business days from receipt by OHS-LGRP)	(7) For OHS- LGRP use
	Schedule Number	Date the RC-2 was approved by the Records Commission			From	To		