



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
Columbus, Ohio 43211-2497

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.

Reviewed 9/2022
EA



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State Archives of Ohio
Local Government Records Program

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Columbus, Ohio 43211-2497

JUN 15 2017

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STATE AND LOCAL
GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

Section A: Local Government Unit

Lake County Board of DD

(local government entity)

(unit)

Elfriede Roman
(signature of responsible official)

Elfriede Roman
(name)

Superintendent
(title)

3-2-17
(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.

Janice P. Troy
Records Commission Chair Signature

6/15/17
Date

Section C: Ohio Historical Society - State Archives

Annita Rindler
Signature

Local Government Records Archivist
Title

6/27/17
Date

Section D: Auditor of State

Martin E. Muehl
Signature

7-5-17
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**

*Reviewed 9/22
EHA*



Section E: Records Retention Schedule

Lake County Board of DD

(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 Required by OHS- LGRP
1	Accounts Payable/Accounts Receivable; final documents	Audit Settlement + 7 years	Paper		<input type="checkbox"/>
2	Accounts Payable/Accounts Receivable; working documents	Audit Settlement + 7 years	Paper		<input type="checkbox"/>
3	Asbestos Records	Permanent	Paper		<input type="checkbox"/>
4	Audit Reports	Permanent	Electronic Storage		<input type="checkbox"/>
5	Board Member Service Records	Length of time + 2 years	Paper		<input type="checkbox"/>
6	Bids (unsuccessful)	3 years after completion of project	Paper		<input type="checkbox"/>
7	Bids and RFP's	15 years	Paper		<input type="checkbox"/>
8a	Board Meeting Minutes and Materials	Permanent	Microfilm		<input checked="" type="checkbox"/>
8b	Board Meeting Minutes and Materials (audio)	15 years	Audio Tapes /Electronic Storage		<input type="checkbox"/>
8c	Board Meeting Minutes and Materials	2 years	Electronic Storage		<input type="checkbox"/>
8d	Board Meeting Minutes and Materials	Permanent	Paper		<input checked="" type="checkbox"/>
9	Board Planning Documents	Effective Period +2 years	Paper		<input type="checkbox"/>
10	Capital Project Working Documents	15 years	Paper		<input 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.

*Reviewed 4/2022
EJA*



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Lake County Board of DD

(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 Required by OHS- LGRP
25	Depreciation Schedule	Permanent	Paper		<input type="checkbox"/>
26	Employee Benefit Records	3 Years, May be Destroyed if No Claims or Litigation Pending	Paper		<input type="checkbox"/>
27	Employee Certification/Licenses	Current + 1 Year Prior	Paper		<input type="checkbox"/>
28a	Employee History of Aversive Action	Permanent	Electronic Storage		<input type="checkbox"/>
28b	Employee History of Aversive Action	5 Years	Paper		<input type="checkbox"/>
29	Employee Payroll Records Supporting Documents	5 years	Paper		<input type="checkbox"/>
30a	Employee Payroll Records – Timesheets and Final Documents and Bureau of Worker's Comp Awards	Permanent	Microfilm or Electronic Storage		<input type="checkbox"/>
30b	Worker's Compensation Records	10 Years After Last Payment	Paper Until Scanned Electronic ally then Electronic Storage		<input type="checkbox"/>
30c	Employee Incident/Accident Reports	5 Years	Paper		<input type="checkbox"/>
31	Employee Schedules	Can be Destroyed in Normal Course of Business as Deemed of no Value by Holder	Paper		<input type="checkbox"/>
32a	Employment Files; Position Descriptions, Evaluations, Inservice Training, Leave Records	3 Years After Resignation	Paper		<input type="checkbox"/>
32b	Employee FMLA and Medical Records	7 Years After Employee Separation	Paper		<input type="checkbox"/>

*Reviewed 4/2022
 WJA*



Section E: Records Retention Schedule

Lake County Board of DD

(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 Required by OHS- LGRP
33a	Employment Applications/Resignations/Work Histories – Employees	Permanent	Electronic Storage		<input type="checkbox"/>
33b	Employment Applications/Resignations/Work Histories – Employees	Duration of Employment + 7 Years	Paper		<input type="checkbox"/>
34	Facility Usage Logs	2 Years	Paper		<input type="checkbox"/>
35a	Financial Statements (Annual)	Permanent	Electronic Storage		<input type="checkbox"/>
35b	Financial Statements (Annual)	7 Years	Paper		<input type="checkbox"/>
36a	Fixed Asset Inventory	Permanent	Electronic Storage		<input type="checkbox"/>
36b	Fixed Asset Inventory	3 Years	Paper		<input type="checkbox"/>
37	Food Service Operation Records	2 Years	Paper		<input type="checkbox"/>
38	General Office Files	3 Years	Paper Until Scanned Electronically then Electronic Storage		<input type="checkbox"/>
39	Interoffice Memorandum	1 Year	Paper Until Scanned Electronically then Electronic Storage		<input type="checkbox"/>
40a	Journal Entry Book	Audit Settlement + 7 Years	Microfilm		<input type="checkbox"/>

Reviewed 9/2022
EJA



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(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 Required by OHS- LGRP
40b	Journal Entry Book	Audit Settlement + 7 Years	Paper		<input type="checkbox"/>
41	Litigation, Arbitration, Negotiations, Legal Opinions	Permanent	Paper		<input checked="" type="checkbox"/>
42	Maintenance Work Orders and Repair Records	3 Years	Paper		<input type="checkbox"/>
43	Medicaid Billing Documents	Audit Settlement + 7 Years	Paper		<input type="checkbox"/>
44	Meeting Minutes (Other Than Board)	3 Years	Paper		<input type="checkbox"/>
45a	Messages and Communications	Can be Destroyed in Normal Course of Business as Deemed of no Value by Holder	E-mail or Electronic		<input type="checkbox"/>
45b	Messages and Communications	Can be Destroyed in Normal Course of Business as Deemed of no Value by Holder	Paper		<input type="checkbox"/>
46	OSHA Records	5 Years	Paper		<input type="checkbox"/>
47a	Current Board Policy Manual	Effective Period	Paper		<input type="checkbox"/>
47b	Expired or Replaced Board Policies	15 Years	Paper Until Scanned Electronic ally then Electronic Storage		<input type="checkbox"/>

*Reviewed 9/5/22
GJA*



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Lake County Board of DD

(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 Required by OHS- LGRP
48a	Publications	8 Years then OHS will Evaluate	Paper		<input type="checkbox"/>
48b	Publications	8 Years then OHS will Evaluate	Electronic Storage		<input type="checkbox"/>
49	Purchasing Documents	3 Years	Paper		<input type="checkbox"/>
50	Quality Assurance Inspection Records	3 Years	Paper		<input type="checkbox"/>
51	Safety Inspections and Safety Drills	3 Years	Paper		<input type="checkbox"/>
52	Security/CCTV Video Recordings	14 Days	Electronic Storage		<input type="checkbox"/>
53	Underground Storage Tanks	Permanent	Paper		<input type="checkbox"/>
54	Vehicle Records	3 Years After Life of Vehicle	Paper		<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>

*Reviewed 9/2022
EJA*