



Ohio Historical Society  
State Archives of Ohio  
Local Government Records Program

1982 Velma Avenue  
Columbus, Ohio 43205

June 10 2020

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: Local Government Unit

Greene County General Schedule

(local government entity)

*Robin J. Heise*

Robin J. Heise

Records Manager & Archivist

5/15/2020

(signature of responsible official)

(name)

(title)

(date)

Section B: Records Commission

GREENE COUNTY

Records Commission

937-562-6489

(telephone number)

C/O GREENE COUNTY ARCHIVES, 535 LEDBETTER ROAD, XENIA, OHIO  
(address)

(city)

45385

(zip code)

GREENE

(county)

To have this form returned to the Records Commission electronically, include an email address: [rhelse@co.greene.oh.us](mailto:rhelse@co.greene.oh.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.

*Branch Huddler*

6-10-2020

Records Commission Chair Signature

Date

Section C: Ohio Historical Society - State Archives

Local Government Records Archivist 6/29/2020

Signature

Title

Date

Section D: Auditor of State

Signature

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.

## + SCHEDULE OF RECORDS RETENTION AND DISPOSITION

### A GENERAL SCHEDULE FOR USE BY ALL COUNTY OFFICES AND AGENCIES – 2020

***NOTE: THIS GENERAL SCHEDULE DOES NOT MODIFY OR SUPERSEDE ANY SPECIFIC OFFICE, AGENCY, OR DEPARTMENTAL SCHEDULES APPROVED BY THE COUNTY RECORDS COMMISSION. This schedule pertains to all media type (paper and electronic).***

**WHEN USING THIS GENERAL SCHEDULE, THE RECORDS COMMISSION DOES NOT REQUIRE A CERTIFICATE OF RECORDS DISPOSAL.**

Schedule Number	Record Title and Description	Retention Period
20-1G	<b><u>Activity Reports</u></b> Reports compiled to detail financial, statistical, and/or operational data.	Retain for two years.
20-2G	<b><u>Agendas and Meeting Notices</u></b>	Retain for two years.
20-3G	<b><u>Annual Reports</u></b> A report containing substantive information of operations, policies, procedures, and planning.	Permanent. <i>Transfer to the Archives when no longer of administrative value.</i>
20-4G	<b><u>Audit Reports</u></b> Federal, state and internal.	Retain for five years.
20-5G	<b><u>Badges and IDs</u></b> Employee identification badges and keyless entry devices and related records.	Confiscate upon termination of employee, or when obsolete, then destroy.
20-6G	<b><u>Blank Forms</u></b> Obsolete, unneeded, or superseded forms stock.	Destroy within thirty days after obsolescence.
20-7G	<b><u>Budgets</u></b> Departmental and Office budget working papers and copies of budget documents submitted to the Office of the County Commissioners.	Retain for three years.
20-8G	<b><u>Bulletins, Posters, and Notices</u></b> Information used for the sole purpose of informing people of events or other activities, including unsolicited announcements, invitations, etc., not filed as evidence of office operations.	Retain until no longer of administrative value.

RC-3 Required

20-9G	<p><b><u>Continuing Education Certifications/Seminar/Training Records</u></b> Includes professional licenses, certifications, trainings, and other documents noting advancement in education related to job position.</p>	Retain until no longer of administrative value.
20-10G	<p><b><u>Contracts</u></b> Duplicate copies of legal contracts, retained by offices for reference purposes. <b><i>Does not include the original large county contracts held by the Office of the County Commissioners.</i></b></p>	Retain for the duration of the contract.
20-11G	<p><b><u>Correspondence</u></b> General office correspondence of a routine nature, including copies of outgoing correspondence maintained for reference purposes.</p>	Retain until no longer of administrative value.
20-12G	<p><b><u>Delivery and Packing Slips</u></b> Documents received when accepting goods from a carrier or vendor.</p>	Retain until no longer of administrative value.
20-13G	<p><b><u>Desk/Appointment Calendars</u></b></p>	Retain for three months after the end of the calendar year.
20-14G	<p><b><u>Directories/Mailing Lists and Rosters</u></b> Lists including information such as phone numbers, e-mail addresses, staff roster, committee membership, assignments, and schedules.</p>	Retain until superseded, obsolete, or replaced.
20-15G	<p><b><u>Disaster Plans (Continuity of Operations Plan)</u></b> Documents plans and procedures to protect and reestablish county operations in the event of a disaster.</p>	Retain until superseded.
20-16G	<p><b><u>Drafts, Informal Notes, and Working Papers</u></b> Including, memoranda, telephone and electronic messages, etc., used in lieu of oral communication, or to prepare county records.</p>	Retain until no longer of administrative value.
20-17G	<p><b><u>Duplicate Records</u></b> Internally duplicated records created for administrative convenience or reference only, where originals are held by another office.</p>	Retain until no longer of administrative value.

20-18G	<p><b><u>Electronic Copies</u></b> Office copies of documents stored on electronic storage technology such as CDs, PCs, network drives, flash drives, external hard drives, used as preliminary input or temporary storage or output control, the results of which are produced or are otherwise available in record form in paper, microfilm or online. Does not include copies <u>retained primarily as backup or security copies.</u></p>	Retain until no longer of administrative value, provided that the official copy of the record is retained for the applicable retention period.
20-19G	<p><b><u>Electronic Mail (e-mail) Messages</u></b> E-mail is not a record series. It is an electronic method for sending messages, both official records and non-records. <u>Retain according to content. County records should be electronically filed or printed to paper and retained as part of the appropriate record series. For more details refer to the Greene County Guidelines for the Management and Retention of Electronic Mail</u></p>	Retain for the retention period of the appropriate record series. Refer to this General Schedule, e.g. See Correspondence (20-11G), or Drafts and Informal Notes (20-16G), or the office's Schedule of Records Retention and Disposition.
20-20G	<p><b><u>Equipment Inventories</u></b> Office copies.</p>	Retain for three years.
20-21G	<p><b><u>Equipment Maintenance Records</u></b> Files documenting ownership, warranties, routine maintenance and repair of county owned equipment.</p>	Retain until the equipment is sold or otherwise disposed of.
20-22G	<p><b><u>Fee Schedules</u></b> Fee schedules for goods and services provided by the county.</p>	Retain until superseded.
20-23G	<p><b><u>Financial Records</u></b> Records pertaining to financial transactions including accounts receivable and accounts payable; bank statements; pay-ins to treasury; purchase orders; requisitions; invoices; warrants/billbacks; bill schedules; detail reports; cash and account books; receipts; canceled checks; vouchers; appropriation adjustments; transfers; encumbered and unencumbered amounts; and remaining balances; monthly expenditure statements; petty cash; etc.</p>	Retain for three years, provided audited.
20-24G	<p><b><u>Grant Applications (not funded)</u></b></p>	Retain for one year.

20-25G	<p><b><u>Grant Files</u></b> Documents the application, evaluation, awarding, monitoring, and tracking of grants received.</p>	<p>Retain records as required by grant; if retention is not specified, retain for five years provided all State or Federal audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved.</p>
20-26G	<p><b><u>Image Files</u></b> Visual documentation (photographs, slides, video tapes) of a person, place, or event.</p>	<p>Retain until no longer of administrative value, then <i>transfer to the Archives. Appraise for historical value.</i></p>
20-27G	<p><b><u>Legal Advertisements/Notices</u></b> Legal announcements to inform the public of meetings, hearings, bids, auctions or other events.</p>	<p>Retain for one year or until superseded.</p>
20-28G	<p><b><u>Licenses, Permits, and Certifications</u></b> Documents affirming requirements being met as prescribed by an issuing agency.</p>	<p>Retain for one year after expiration.</p>
20-29G	<p><b><u>Management and Operations Reports</u></b> Reports and/or feasibility studies including statistical analysis created to assess functions, projects and programs.</p>	<p>Retain for five years.</p>
20-30G	<p><b><u>Material Safety Sheets</u></b></p>	<p>Retain until superseded.</p>
20-31G	<p><b><u>Meeting Audio or Video Recordings</u></b> Electronic sound or video recordings of meetings later produced in written official proceedings or minutes.</p>	<p>Retain recordings of statutory boards and commission meetings for two years. Other recordings may be destroyed 30 days after approval of the official record.</p>
20-32G	<p><b><u>Minutes of Administrative Meetings</u></b> Meetings of administrative staff, management teams, committees, or working groups. Includes both departmental and inter-departmental meetings.</p>	<p>Retain the definitive copy maintained by the group's designated recorder permanently (if the meeting group develops policies, procedures, work plans, or programs at the department level or higher).</p>

RC-3 Required

20-33G	<p><b><u>Minutes of Meetings or Hearings of Appointed Bodies or Commissions</u></b>          Official minutes of proceedings, discussion, decisions, votes, resolutions, or other official actions of appointed boards and commissions during public or executive session meetings.</p>	<p>Retain the definitive copy maintained by the designated recorder permanently.</p>	<p>RC-3 Required</p>
20-34G	<p><b><u>Pay –ins</u></b>          For payments to the County Treasurer of cash received by county offices.</p>	<p>Retain for three years.</p>	
20-35G	<p><b><u>Payroll Records</u></b>          Including payroll sign in sheets, overtime forms, time cards, time sheets, leave requests and other related items. <b><u>Does not include original payroll records held by the County Auditor.</u></b></p>	<p>Retain for three years.</p>	
20-36G	<p><b><u>Personal Property</u></b>          Employees’ copies of personal material, certificates, training documentation, etc.</p>	<p>Retain until no longer of administrative value.</p>	
20-37G	<p><b><u>Personnel Files—Employees under Board of County Commissioners</u></b>          Office copies of personnel files on individual employees, containing any of the following: applications, personnel actions, performance evaluations, disciplinary or grievance documentation, documentation of training received, or other documentation relating to the person’s employment history. <b><u>Does not include the long term personnel records held by the Personnel Department.</u></b></p>	<p>Retain for two years following the termination of employment (provided that all required documentation has been forwarded to the Personnel Department).</p>	
20-38G	<p><b><u>Policy and Procedures Manuals</u></b>          Manuals or directives establishing county-wide policies or procedures, internal operating procedures for specific units of county government, or policies and procedures for dealing with the public.</p>	<p>Retain the definitive copy in the office that created or implemented the manual or directive, including all superseded versions, permanently.</p>	
		<p>Retain all reference copies until superseded.</p>	
20-39G	<p><b><u>Pre-Employment Applications</u></b>          For unsuccessful applicants, who are not called for interviews.</p>	<p>Retain for two years, and then destroy, provided there are no pending complaints or litigation. Data maintained in NeoGov.</p>	

RC-3 Required

- 20-40G **Press and News Releases**  
Information disseminated to the public through media outlets
- 20-41G **Professional Association Records**  
Individual membership records.
- 20-42G **Public Records Requests**  
Office copies.  
*For assistance with non-routine or voluminous requests contact the County Records and Information Manager/Archivist.*
- 20-43G **Public Relations and Training Materials**  
Materials and resources compiled or created for presentations, public relations events, and/or training exercises.
- 20-44G **Publication Stock**  
Stocks of various publications and printed brochures created or received.
- 20-45G **Receipts**  
Copies of receipts issued or stubs from receipts issued for cash fees paid to county offices. ***Does not include copies of receipts for payment of any tax liability.***
- 20-46G **Records Retention Schedules**  
Copies of schedules approved by the County Records Commission and the State of Ohio authorizing the minimum required retention periods for records of county offices. ***Does not include definitive schedules held by the Office of Records and Information.***
- 20-47G **Reference, Library, or Museum Material**  
Information and items acquired for individual use or exhibition, including convenience copies, textbooks, periodicals, and technical reference materials.
- 20-48G **Scrapbooks**  
Compilation of materials for retention of institutional memory.

Retain until no longer of administrative value.  
*Appraise for historical value and transfer to the Archives.*

Retain until no longer of administrative value.

Retain for three years.

Retain until superseded.  
*Appraise for historical value and transfer to the Archives.*

Retain until no longer of administrative value. *Transfer one copy to the Archives.*

Retain for three years.

Retain until superseded.

Retain until no longer of administrative value.

Permanent. *Transfer to the Archives when no longer of administrative value.*

RC-3 Required

20-49G	<p><b><u>Social Media Posts &amp; Records</u></b>  Information posted or received that is considered to be an original record. <b>Social media is not a record series. It is an electronic means of communicating with the public, both official records and non-records.</b> <i>Retain according to content. County records should be electronically filed or printed to paper and retained as part of the appropriate record series.</i></p>	Retain for the retention period of the appropriate record series. Refer to this General Schedule, e.g. See Correspondence (20-11G), or Drafts and Informal Notes (20-16G), or the office's Schedule of Records Retention and Disposition.
20-50G	<p><b><u>Social Media Posts &amp; Records</u></b>  Copy of record(s); does not include original information.</p>	Retain until no longer of administrative value.
20-51G	<p><b><u>Social Media Account Records</u></b>  Records may include information on Account ID, User Name(s), Password Information, Authorized Users List, Content Editors List, Date Account was Established and/or Terminated, Authorizing Representative, Account Creator(s), Site Terms and Use Agreement &amp; Updates, etc.</p>	Retain one year after account is terminated, provided no action pending.
20-52G	<p><b><u>Speeches/Presentations</u></b>  Written and/or recorded materials. Distributed when speaking to a group or press conference concerning an office and/or its operations.</p>	Retain until no longer of administrative value. <i>Appraise for historical value.</i>
20-53G	<p><b><u>Surveillance Video Recordings</u></b>  Footage documenting daily actions of employees and visitors within an office and on its grounds for security purposes.</p>	Retain for one cycle.
20-54G	<p><b><u>Surveys &amp; Questionnaires</u></b>  Records collected from employees or public to assess how an event or program is perceived to determine if improvements or changes should be made.</p>	Retain until no longer of administrative value.
20-55G	<p><b><u>Travel and Training Expense Records</u></b>  Duplicate copies of travel advance requests, travel claim vouchers, training class registration payments, and any supporting documentation relating to the advancement and reimbursement of travel/training funds and expenses, retained by the office requesting payments for travel. <b><u>Does not include travel/training records held by the Office of the County Commissioners.</u></b></p>	Retain for three years.



- 20-56G      **Technical Hardware Documentation**  
Written documentation of computer hardware specifications, maintenance requirements, computer applications programs, software manuals, and other hardware or software documentation necessary to operate computer equipment or programs and to access or retrieve stored information or data. Documentation may be in paper or electronic format.

Retain for the life of the computer equipment and/or software.
  
- 20-57G      **Vehicle Maintenance Records**  
Records noting repairs to and routine maintenance of county-owned vehicles.

Retain until vehicle is sold or disposed of.
  
- 20-58G      **Vehicle Mileage Records**  
Log of mileage and expenses incurred in county-owned vehicles.

Retain until vehicle is sold or disposed of.
  
- 20-59G      **Volunteer/Intern Records**  
Records may include application for volunteer/intern service, liability waiver/release, hours worked, disciplinary actions, and evaluations.

Retain for three years after termination of service.
  
- 20-60G      **Vouchers—Shared Purchase**  
Copies of purchase requisitions, purchase orders, and claim vouchers above \$25,000.00 for which funding has been provided by more than one county office or department.

Retain for ten years.

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