



**Ohio Historical Society**  
 State Archives of Ohio  
 Local Government Records Program  
 800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

JUL 02 2019

STATE AND LOCAL  
 GOVERNMENT RECORDS

**RECORDS RETENTION SCHEDULE (RC-2)**

See instructions before completing this form.

**Section A: Local Government Unit**

**Worthington City School District**  
 (local government entity) (unit)  
 Jeffrey S. McCuen, Treasurer/CFO  
 (signature of responsible official) (name) (title) (date)  
 May 30, 2019

**Section B: Records Commission**

**Worthington City Schools** 614.450.6121  
 (telephone number)  
 Records Commission  
 200 E. Wilson Bridge Road, Worthington, OH 43085 Franklin  
 (address) (city) (zip code) (county)

To have this form returned to the Records Commission electronically, include an email address: jmccuen@wsclocal.org

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.

Jeffrey S. McCuen  
 Records Commission Chair Signature Date  
 6/24/19

**Section C: Ohio Historical Society - State Archives**

Fred Treitz State Archivist 7-5-2019  
 Signature Title Date

**Section D: Auditor of State**

Martin E. Muehlebach  
 Signature Date  
 7-18-19

**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**

\*After End of Fiscal Year  
 \*\*Provided Audited  
 \*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Section E: Records Retention Schedule**

**Worthington City Schools**

(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
<b>1000</b>	<b><u>Board &amp; Administrative Records</u></b>				
<b>1101</b>	Board meeting Minutes Treasurer Records all actions taken by the Board of Educ.	<b>Permanent</b>	<b>Paper and Electronic</b>		<input checked="" type="checkbox"/>
<b>1101.1</b>	Board meeting electronic recordings Treasurer Audio recording of regular board meetings	<b>2 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>1102</b>	Blue Prints, Plans, Maps Business Office and Secretary Schematic drawings of facilities and property	<b>Permanent</b>	<b>Paper</b>		<input checked="" type="checkbox"/>
<b>1103</b>	Deeds, Easements, Leases Treasurer	<b>Permanent</b>	<b>Paper</b>		<input checked="" type="checkbox"/>
<b>1104</b>	Board Policy Books and Other Adopted Policies Superintendent and Secretary	<b>1 year after superseded</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>1105</b>	Administrative Regulations Superintendent	<b>1 year after superseded</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>1106</b>	Court Decision Treasurer	<b>Permanent</b>	<b>Paper</b>		<input checked="" type="checkbox"/>
<b>1107</b>	Claims and Litigation Treasurer	<b>5 years after closed</b>	<b>Paper</b>		<input type="checkbox"/>
<b>1201</b>	Elections Treasurer	<b>10 years</b>	<b>Paper</b>		<input type="checkbox"/>
<b>1202</b>	Record Disposal forms (RC-3) Treasurer	<b>10 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>1203</b>	Record Retention Schedule (RC-2) Treasurer	<b>Until superseded</b>	<b>Electronic</b>		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
1204	Bargaining Agreements Treasurer	10 years After expiration	Electronic		<input type="checkbox"/>
1301	Worker's Compensation Claims Treasurer	7 years	Electronic		<input type="checkbox"/>
1302	Bank Depository Agreements Treasurer	4 years after completion	Electronic		<input type="checkbox"/>
1303	Organization Reports Treasurer	2 years**	Electronic		<input type="checkbox"/>
1304	Board Meeting Notes Treasurer	1 year	Paper		<input type="checkbox"/>
1305	Agendas Treasurer	1 calendar year**	Electronic		<input type="checkbox"/>
1401	Adopted Courses of Study Superintendent and Secretary	Until Superseded	Electronic		<input type="checkbox"/>
1402	Adopted Special Education Programs Superintendent and Secretary	Until Superseded	Electronic		<input type="checkbox"/>
1403	Adopted Special Programs Superintendent and Secretary	Until Superseded	Electronic		<input type="checkbox"/>
1450	Email & Voice mail (General)	Discretion- ary	Electronic		<input type="checkbox"/>
1451	Email & Voice mail (Critical) Treasurer	1 year	Electronic		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
 State Archives of Ohio  
 Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
<u>2000</u>	<u>Human Resources</u>				
	(Employee files include employment applications, resumes, OTES evaluations, personnel actions, absence certification, transcripts and any other documents which become part of the file).				
2101	Certified Active Employees Asst. Supt, Personnel Secretary	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
2102	Classified Active Employees Asst. Supt, Personnel Secretary	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
2103	Certificated Inactive Employees Asst. Supt, Personnel Secretary	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
2104	Classified Inactive Employees Asst. Supt, Personnel Secretary	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
2105	Civil Rights, Civil Services and Disciplinary Reports Asst. Supt, Personnel Secretary	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
2107	Retirement Letters Asst. Supt, Personnel Secretary	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
2108	Substitute Records Asst. Supt, Personnel Secretary	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
2303	Irregular Employee Contracts (Substitutes) Treasurer	4 years after contract expires	Paper		<input type="checkbox"/>
2304	Unemployment Claims Treasurer	5 years	Paper		<input type="checkbox"/>
2306	Applications (hot hired) Asst. Supt., Personnel and Secretary	2 years**	Electronic		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
2307	Schedule of Employees Asst. Supt., Personnel and Secretary	Fiscal Year plus 2 Years	Electronic		<input type="checkbox"/>
2308	Student Helper Applications Asst. Supt., Personnel and Secretary	2 years	Electronic		<input type="checkbox"/>
2309	Teacher Personnel Reports (Internal) Asst. Supt., Personnel and Secretary	Fiscal Year plus 3 Years	Electronic		<input type="checkbox"/>
2310	I-9 Immigration Verification Forms Asst. Supt., Personnel and Secretary	Termination of Employ. plus 1 year***	Electronic		<input type="checkbox"/>
2401	Job Description Asst. Supt., Personnel and Secretary	1 year after superseded	Electronic		<input type="checkbox"/>
<b>3000</b>	<b><u>STUDENT RECORDS</u></b>				
3101	Student Records Folders Bldg. Secretary Enrollment/Withdrawal Birth Certificate Grades/Transcripts Activities Record Attendance Records Individual Test Results Standardized Competency/Proficiency Aptitude Intervention Records Foreign Exchange Records Home Schooled Student Records	Until Scanned  Permanent***	Paper  Electronic		<input type="checkbox"/> <input type="checkbox"/>
3201	Health/Medical Records – Nurse/Bldg. Sec. Visual Screening Hearing Screening Immunization Records	7 years after Graduation***	Electronic		<input type="checkbox"/>
3202	Discipline Records Bldg. Secretary Letters to Parents Office Discipline	1 year after Student Leaves School	Electronic		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
3203	Psychological Records (Restricted) Special Ed. Secretary/Nurse	10 Years After Leaving	Electronic		<input type="checkbox"/>
3204	Child Abuse/Neglect Referral Letters Bldg. Secretary	Through Graduation	Electronic		<input type="checkbox"/>
3301	Teacher Grade Books/Records Bldg. Secretary	3 years***	Electronic		<input type="checkbox"/>
3302	Pre-School Screening Profiles Bldg. Secretary	3 years	Paper		<input type="checkbox"/>
3303	Age and Schooling Records (Work Permits) Bldg. Secretary	3 years	Paper		<input type="checkbox"/>
3304	Accident Reports Nurse/Bldg. Secretary	Until scanned  5 years	Paper  Electronic		<input type="checkbox"/>
3305	Individual Education Plan (IEP) Bldg. Secretary/Special Ed. Secretary	Until Scanned  6 years	Paper  Electronic		<input type="checkbox"/> <input type="checkbox"/>
3306	Free/Reduced Price Lunch Application Food Service	Until scanned  4 years	Paper  Electronic		<input type="checkbox"/>
3401	Emergency Information Infinite Campus	Until superseded	Electronic		<input type="checkbox"/> <input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
<b>4000</b>	<b><u>BUILDING RECORDS</u></b>				
<b>4202</b>	Tornado and Fire Drill Records Bldg. Secretary	<b>1 year*</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>4203</b>	Building Health Inspections Bldg. Secretary	<b>2 years*</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>4301</b>	Student Activity Records – Bldg. Secretary Pay-in forms Pay-out forms Account forms/Dist. Ticket sale reports	<b>2 years**</b>	<b>Paper</b>		<input type="checkbox"/>
<b>4401</b>	Textbook Inventories Bldg. Secretary	<b>Until superseded</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>4403</b>	Student Handbooks Bldg. Secretary	<b>Until Superseded</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>4404</b>	School Safety Plans	<b>Until superseded</b>	<b>Electronic</b>		
	<b><u>Special Education Department</u></b>				
<b>5221</b>	Special Education Tutoring Reports Special Ed. Secretary	<b>2 years</b>  <b>10 years</b>	<b>Paper</b>  <b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5222</b>	Individual Educational Plan (IEP) Special Ed. Secretary	<b>Until scanned</b>  <b>Permanent</b>	<b>Paper</b>  <b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5223</b>	Psychological Records (Restricted) Special Ed. Secretary	<b>Permanent</b>	<b>Electronic</b>		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
<b>5000</b>	<b><u>CENTRAL DEPT. RECORDS</u></b>  <u>Administrative Offices</u>				
<b>5301</b>	Repair, Installation and Maintenance Records Business Office and Secretary	<b>2 years</b>  <b>4 years</b>	<b>Paper</b>  <b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5302</b>	Prevailing Wage Records Business Office and Secretary	<b>2 years</b>  <b>4 years</b>	<b>Paper</b>  <b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5303</b>	Rental Information (Use of Facilities) Business Office and Secretary	<b>4 years</b>	<b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5304</b>	Work Orders Business Office and Secretary	<b>4 years</b>	<b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5305</b>	Environmental Reports and Data (asbestos, etc.) Business Office and Secretary	<b>2 years</b>  <b>4 years</b>	<b>Paper</b>  <b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5306</b>	Vandalism Reports Business Office and Secretary	<b>2 years</b>  <b>4 years</b>	<b>Paper</b>  <b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5307</b>	Student Activity Purpose Clauses Treasurer	<b>4 years</b>	<b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5308</b>	Sales Potential Forms (Student Activities) Treasurer	<b>Until scanned</b>  <b>4 years</b>	<b>Paper</b>  <b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>5309</b>	Bids and Specifications (Unsuccessful) Business office	<b>1 year</b>	<b>Paper</b>		<input type="checkbox"/>
<b>5310</b>	Bid and Specifications (Successful) Business office	<b>4 years after completion of project</b>	<b>Paper</b>		<input type="checkbox"/>
<b>5311</b>	Contractor Files (Resolutions, additions, drawing, etc.) Business Office and Secretary	<b>Until Project Complete, if No Action Pending**</b>	<b>Paper</b>		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically





**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
	<u>Administrative Offices</u>				
5401	Preventive Maintenance Reports Business Office and Secretary	Fiscal Year plus 2 yrs.	Paper		<input type="checkbox"/>
5402	Warranty/Guarantee Business Office and Secretary	Life/Warranty of Equip. ***	Electronic		<input type="checkbox"/>
5403	Plant and Equipment Inventory Business Office and Secretary	Until Superseded	Electronic		<input type="checkbox"/>

\*After End of Fiscal Year  
 \*\*Provided Audited  
 \*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
	<u>Transportation Department</u>				
5340	Driver Physical Transportation T-8	6 years	Paper		<input type="checkbox"/>
5341	Fuel Consumption Data Transportation	4 years**	Electronic		<input type="checkbox"/>
5342	Transportation Records Transportation	2 years**	Electronic		<input type="checkbox"/>
5343	Field Trip forms and Volunteer Driver forms Transportation	Until scanned  2 years**	Paper  Electronic		<input type="checkbox"/>
5441	Accident Reports T-10	3 years Provided no action pending	Electronic		<input type="checkbox"/>
5442	Vehicle Registration Transportation OHP-32	Life of Vehicle	Paper		<input type="checkbox"/>
5443	Vehicle Title Treasurer	Life of Vehicle	Paper		<input type="checkbox"/>
5445	Driver Certifications Transportation Secretary	1 year after termination	Paper		<input type="checkbox"/>
5446	Supplies Inventory Transportation	Until Superseded	Paper  Electronic		<input type="checkbox"/>
5447	Vehicle Defect Report Transportation	Life of Vehicle	Paper  Electronic		<input type="checkbox"/>
5448	Warranty – Engine	Until Expiration			<input type="checkbox"/>
5449	Bus Condition – Pretrip Inspection	1 year after the end of school year	Electronic		<input type="checkbox"/>
5450	Student conduct records	1 year after the end of school year	Electronic		

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

<b>(1) Schedule Number</b>	<b>(2) Record Title and Description</b>	<b>(3) Retention Period</b>	<b>(4) Media Type</b>	<b>(5) For use by Auditor of State or OHS-LGRP</b>	<b>(6) RC-3 Required by OHS- LGRP</b>
5451	Bus videos	1 recording cycle unless action pending	Electronic		

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
	<b><u>Food Service Department</u></b>				
5561	Food Service Records Cafeteria Supervisor Menus Food Production Milk Sold Students Served	1 year*  5 years	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
5562	Lunchroom Records Cafeteria Supervisor Cash Register Tapes Cashier's Daily Reports	1 year*  5 years	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
5563	Lunchroom Reports Cafeteria Supervisor (Free and Reduced Lunch)	1 year*  5 years	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
5565	Lunchroom License Cafeteria Supervisor	1 year after expiration	Paper		<input type="checkbox"/>
5564	Inventories Cafeteria Supervisor	Until Superseded	Paper		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
<b>6000</b>	<b><u>FINANCIAL RECORDS</u></b>				
<b>6101</b>	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	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>6102</b>	Activity Fund Cash Journal and Ledger Treasurer	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>6103</b>	Bond Register Treasurer	<b>5 years After Issue Expires</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>6104</b>	Securities Treasurer	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>  <input type="checkbox"/>
<b>6201</b>	Investment Ledger Treasurer	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>6202</b>	Foundation Distribution Treasurer	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>6203</b>	Tax Settlements Treasurer	<b>5 years</b>	<b>Paper</b>		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
 State Archives of Ohio  
 Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
6204	Budgets (Annual) Treasurer	5 years	Electronic		<input type="checkbox"/>
6205	Insurance Policies Treasurer	5 years After expiration provide claims settled	Paper (Open)  Electronic (once settled)		<input type="checkbox"/>  <input type="checkbox"/>
6206	Contracts Treasurer	5 years	Electronic		<input type="checkbox"/>
6207	Bond and Coupons Treasurer	Until Redeemed ***	Electronic		<input type="checkbox"/>
6210	Budget Work papers	2 years	Electronic		<input type="checkbox"/>
6211	Vouchers, Invoices, and Purchase Orders Treasurer	Until scanned  10 years	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
6212	State Program Files Treasurer Aux Services, DPPF, Adult Vocational, Excess Lottery, Data Processing, Public/Private Grants, etc.	10 years	Electronic		<input type="checkbox"/> <input type="checkbox"/>
6213	Federal Program Files, Treasurer Title I, II, III, IV-B, IV-C & VI-B; Chapter 1, 2; Drug Free, etc.	10 years	Electronic		<input type="checkbox"/> <input type="checkbox"/>
6215	Tax Anticipation Notes, Treasurer (Records borrowing against future tax collections)	5 years	Electronic		<input type="checkbox"/> <input type="checkbox"/>
6216	State Reimbursement Settlements, Treasurer	5 years	Electronic		<input type="checkbox"/> <input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
6217	Unemployment Claims, Treasurer	2 year** 5 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6218	Employee Bonds, Board Member Bonds, Treasurer	2 years** 5 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6219	Certificate of Estimated Resources, Treasurer	2 years** 5 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6220	Appropriation Resolutions, Treasurer	2 years** 5 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6222	Tax Apportionments, Treasurer	2 years** 5 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6301	Canceled Checks and Bank Statements, Treasurer	4 years	Electronic		<input type="checkbox"/>
6302	Publication Notice, Treasurer	4 years	Electronic		<input type="checkbox"/>
6303	Tuition Fees and Payments, Treasurer	4 years	Electronic		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
6304	School Finance Monthly Statements, Treasurer	2 years	Electronic		<input type="checkbox"/>
6305	Investment Records, Treasurer (May include individual record of investments, bank confirmations, wire transfers, copy of CD, etc.)	4 years	Electronic		<input type="checkbox"/>
6308	Student Activity Fund, Treasurer (Pay-ins, Pay-outs, Receipts/Deposits, Reports)	Until scanned 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6309	Check Registers, Treasurer	4 years	Electronic		<input type="checkbox"/> <input type="checkbox"/>
6310	Deposit Slips/Cash Proofs, Treasurer	2 years** 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6313	Receipt Books, Treasurer	2 years** 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6314	Extra Trip Records, Treasurer	2 years** 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6315	Monthly Financial Reports, Treasurer	4 years	Electronic		<input type="checkbox"/>
6316	Accounting Data, Treasurer	4 years	Electronic		<input type="checkbox"/> <input type="checkbox"/>
6317	Service Contracts, Treasurer	Until scanned 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
6319	Delivery/Packing Slips, Treasurer	Until scanned	Paper		<input type="checkbox"/>
<b>7000</b>	<u>PAYROLL RELATED</u>				
7001	Payroll Ledgers, Treasurer Bi-Weekly Payroll Reports, Quarterly Payroll Reports	Until scanned Permanent***	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically





**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
7102	Earnings Registers, Treasurer By Staff Member By Calendar	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
7103	Monthly Payroll Reports, Treasurer Leave usage and Accumulation, Retirement service, etc.	Until scanned  Permanent***	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
7201	Bureau of Employment Service Quarterly Reports, Treasurer	Until scanned  7 years	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
7301	W-2's, W-4's, Treasurer (Employer copy)	Until scanned  6 years and Current**	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
7302	Federal Income Tax, Treasurer (Quarterly/Annual)	Until scanned  6 years and Current**	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
7303	Ohio Income Tax, Treasurer (Monthly/Annual)	Until scanned  6 years and Current**	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>
7304	City Income Tax, Treasurer (Monthly/Annual)	Until scanned  6 years and Current**	Paper  Electronic		<input type="checkbox"/>  <input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
7305	School Income Tax, Treasurer (Monthly/Annual)	Until scanned  6 years and Current**	Paper  Electronic		<input type="checkbox"/>
7306	Payroll Reports, Treasurer Reports used for Each payroll- Computer generated	Until scanned  4 years	Paper  Electronic		<input type="checkbox"/> <input type="checkbox"/>
7307	Payroll Update Listing, Treasurer	4 years**	Electronic		<input type="checkbox"/>
7308	Payroll Calculations, Treasurer	4 years**	Electronic		<input type="checkbox"/>
7309	State Teachers System, Treasurer and School Employees Retirement System Waivers	Permanent***	Electronic		<input type="checkbox"/>
7310	State Employees, Treasurer Retirement System (SERS) Reports	Until scanned  4 years**	Paper  Electronic		<input type="checkbox"/>
7311	State Teachers, Treasurer Retirement System (STRS) Reports	Until scanned  4 years**	Paper  Electronic		<input type="checkbox"/>
7312	Annuity Reports, Treasurer	Until scanned  4 years**	Paper  Electronic		<input type="checkbox"/>
7313	Benefit Folders/Reports, Treasurer	Until scanned  4 years**	Paper  Electronic		<input type="checkbox"/>
7314	Employee Request and/or Treasurer Authorization for Leave Forms (Sick, Vacation, Personal, or other leave)	4 years**	Electronic		<input type="checkbox"/>
7315	Deduction Reports, Treasurer Voluntary payroll Deductions	Until scanned  4 years**	Paper  Electronic		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(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
7316	Employee Vacation/ Sick Leave Records, Treasurer	4 years**	Electronic		<input type="checkbox"/>
7317	Time Sheets, Treasurer	Until scanned 6 years**	Paper Electronic		<input type="checkbox"/>
7318	Overtime Authorization, Treasurer	Until scanned 6 years	Paper Electronic		<input type="checkbox"/>
7319	Employee Insurance Bills, Treasurer Medical Dental Life	2 years** 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
7323	Paycheck Register, Treasurer	2 years** 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
7324	Payroll Bank Statement, Treasurer	2 years** 4 years	Paper Electronic		<input type="checkbox"/> <input type="checkbox"/>
7401	Deduction Authorization, Treasurer	Until Superseded or Employee Terminated			<input type="checkbox"/>

\*After End of Fiscal Year  
 \*\*Provided Audited  
 \*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

(1) <u>Schedule Number</u>	(2) <u>Record Title and Description</u>	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Required by OHS- LGRP
<b>8000</b>	<b><u>REPORTS</u></b>				
<b>8201</b>	State Audit Reports, Treasurer	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>8204</b>	School Finance, Treasurer (S.F.) Reports-annual	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>8205</b>	Special Education (S.E.) Reports-annual Special Ed. Sec. Supt. Sec.	<b>7 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>8206</b>	Vocation Education (V.E.) Reports-annual Vocational Sec. Supt. Sec.	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>8207</b>	Ohio Common Core Data (OCCD) Reports Supt. Sec.	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>8209</b>	Ohio Department of Education (ODE) Reports Bldg. Sec.	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>8211</b>	Civil Rights Reports Supt. Sec.	<b>Permanent***</b>	<b>Electronic</b>		<input checked="" type="checkbox"/>
<b>8212</b>	Title IX Reports Supt. Sec.	<b>10 years</b>	<b>Electronic</b>		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

<b>(1)</b> <b>Schedule</b> <b>Number</b>	<b>(2)</b> <b>Record Title and Description</b>	<b>(3)</b> <b>Retention</b> <b>Period</b>	<b>(4)</b> <b>Media</b> <b>Type</b>	<b>(5)</b> <b>For use</b> <b>by</b> <b>Auditor of</b> <b>State or</b> <b>OHS-</b> <b>LGRP</b>	<b>(6)</b> <b>RC-3</b> <b>Required</b> <b>by OHS-</b> <b>LGRP</b>
<b>9000</b>	<b>Other</b>				
<b>9101</b>	Personnel Directory Supt. Sec.	<b>10 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>9102</b>	Enrollment Record (By grade and building) Supt. Sec.	<b>Permanent**</b> <b>*</b>	<b>Electronic</b>		<input checked="" type="checkbox"/> <input type="checkbox"/>
<b>9202</b>	School Calendars Supt. Sec.	<b>5 years</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>9203</b>	Building, Boiler, Maintenance Reports Business Office and Sec.	<b>2 years*</b>	<b>Paper</b>		<input type="checkbox"/>
<b>9402</b>	Employee Handbooks Supt. Sec.	<b>Until</b> <b>Superseded</b>	<b>Electronic</b>		<input type="checkbox"/>
<b>9403</b>	Directives, Standards, Laws for Local, State And Federal Governmental Agencies All Secretaries	<b>Until</b> <b>Superseded</b>	<b>Paper</b>		<input type="checkbox"/>
<b>9404</b>	Attendance Records	<b>Until</b> <b>Superseded</b>	<b>Electronic</b>		<input type="checkbox"/>

\*After End of Fiscal Year

\*\*Provided Audited

\*\*\*Hard Copy Maintained for 2 Years After Audited, Then Stored Electronically