



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

1982 Velma Avenue
Columbus, Ohio 43205

For State Archives - LGRP Use Only

Date Received:

Date Reviewed:

Items requested for transfer: YES NO

If YES, attach copy of transfer form

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 10/4/2023
(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

45385

GREENE

(address)

(city)

(zip code)

(county)

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

robin.heise@greencountyohio.gov

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 Nicholls 12-12-2023
Records Commission Chair Signature Date

Section C: Ohio Historical Society - State Archives

Government Records Archivist

12/14/2023

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 – 2323

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).

The Records Commission does not require a certificate of records disposal (RC3) for MOST records listed. If an RC3 is needed, there will be an "X" in the far-right column.

Schedule Number	Record Title and Description	Retention Period	RC3 or Court Order Required by GC Records Commission
23-01G	<u>Activity Reports</u> Reports compiled to detail financial, statistical, and/or operational data.	Retain for 2 years.	
23-02G	<u>Agendas and Meeting Notices</u> A list of items to be discussed and/or acted upon during a public meeting.	Retain for 2years.	
23-03G	<u>Annual Inventory</u> Departmental inventory of all the materials, machinery, tools, and other county supplies under the jurisdiction of each county office or department. (O.R.C. 305.18)	Retain for 3 years.	
23-04G	<u>Annual Reports</u> A report containing substantive information of operations, policies, procedures, and planning.	Permanent. <i>Transfer to the Archives when no longer of administrative value.</i>	RC-3 Required by LGRP
23-05G	<u>Audit Reports</u> Federal, state and internal. Financial examinations and reports issued by the Federal Government, Auditor of State, independent auditing agencies or conducted internally.	Retain for 5 years.	
23-06G	<u>Badges and IDs</u> Employee identification badges and keyless entry devices and related records.	Confiscate upon termination of employee, or when obsolete, then destroy.	
23-07G	<u>Blank Forms</u> Obsolete, unneeded, or superseded forms stock.	Retain until obsolete or superseded.	
23-08G	<u>Budgets</u> Departmental and Office budget working papers and copies of budget documents submitted to the Office of the County Commissioners.	Retain for 3 years.	

23-09G	<p><u>Bulletins, Posters, and Notices</u> 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.</p>	Retain until no longer of administrative value.	
23-10G	<p><u>Continuing Education Certifications/Seminar/Training Records</u> Includes professional licenses, certifications, trainings, and other documents noting advancement in education related to job position.</p>	Retain until no longer of administrative value.	
23-11G	<p><u>Contracts</u> Duplicate copies of legal contracts, retained by offices for reference purposes. <i>Does not include the original large county contracts held by the Office of the County Commissioners.</i></p>	Retain for the duration of the contract.	
23-12G	<p><u>Coronavirus Relief Fund Payment Record</u> Records that support compliance with subsection 601(d) of the Social Security Act.</p>	Retain for 5 years <i>Appraise for historical value and transfer to the Archives.</i>	X
23-13G	<p><u>Correspondence</u> Messages sent and received in any media, including letters, memoranda, faxes, e-mail messages, and miscellaneous communications.</p> <p>A. <i>Transient</i>-Routine communications which convey information of temporary importance in lieu of oral communication.</p> <p>B. <i>General</i>-Communications that documents the operations of the office and may include non-routine requests for information. This correspondence is informative and does not attempt to influence policy.</p> <p>C. <i>Executive</i>- Communications that documents of the office and may contain information concerning agency policies, fiscal and personnel matters.</p>	<p>Retain until no longer of administrative value.</p> <p>Retain for 1 year.</p> <p>Retain for 3 years; file with related records if content requires longer retention. <i>Appraise for historical value.</i></p>	

23-14G	<u>Delivery and Packing Slips</u> Documents received when accepting goods from a carrier or vendor.	Retain until no longer of administrative value.	
23-15G	<u>Desk/Appointment Calendars</u> Records documenting business appointments for individual staff members.	Retain for 3 months after the end of the calendar year.	
23-16G	<u>Directories/Mailing Lists and Rosters</u> Lists including information such as phone numbers, e-mail addresses, staff roster, committee membership, assignments, and schedules.	Retain until superseded, obsolete, or replaced.	
23-17G	<u>Disaster Plans (Continuity of Operations Plan)</u> Records that document plans and procedures to protect and reestablish county operations in the event of a disaster.	Retain until superseded.	
23-18G	<u>Drafts, Informal Notes, and Working Papers</u> Preliminary working documents and other documents which serve to convey information of temporary importance in lieu of oral communication. May include: memoranda, telephone and electronic messages, etc..	Retain until no longer of administrative value.	
23-19G	<u>Duplicate Records</u> Internally duplicated records, both paper and electronic, created for administrative convenience or reference only, where originals are held by another office. May include: 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.	Retain until no longer of administrative value.	
23-20G	<u>Equipment Maintenance Records</u> Files documenting ownership, warranties, routine maintenance and repair of county owned equipment.	Retain until the equipment is sold or otherwise disposed of.	
23-21G	<u>Fee Schedules</u> Fee schedules for goods and services provided by the county.	Retain until superseded.	

23-22G	<p><u>Financial Records</u> 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. <u>Does not include copies of receipts for payment of any tax liability;</u> canceled checks; vouchers; appropriation adjustments; transfers; encumbered and unencumbered amounts; and remaining balances; monthly expenditure statements; petty cash; etc.</p>	Retain for 3 years, provided audited.	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
23-23G	<p><u>Fuel Usage Records</u> Records detailing fuel used by county vehicles in the course of business.</p>	Retain for 3 years.	
23-24G	<p><u>Grant Applications (not funded)</u> Unsuccessful application for grant funding.</p>	Retain for 1 year.	
23-25G	<p><u>Grant Files</u> Documents the application, evaluation, awarding, monitoring, and tracking of grants received.</p>	Retain records as required by grant; if retention is not specified, retain for 5 years provided all State or Federal audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved.	
23-26G	<p><u>Image Files</u> Visual documentation (photographs, slides, video tapes) of a person, place, or event.</p>	Retain until no longer of administrative value, then <i>transfer to the Archives. Appraise for historical value.</i>	
23-27G	<p><u>Legal Advertisements/Notices</u> Legal announcements to inform the public of meetings, hearings, bids, auctions or other events.</p>	Retain for 1 year or until superseded.	
23-28G	<p><u>Licenses, Permits, and Certifications</u> Documents affirming requirements being met as prescribed by an issuing agency.</p>	Retain for 1 year after expiration.	
23-29G	<p><u>Management and Operations Reports</u> Reports and/or feasibility studies including statistical analysis created to assess functions, projects and programs.</p>	Retain for 5 years.	

23-30G	<u>Material Safety Sheets</u> Information about properties of chemicals, including physical data, toxicity, first aid, storage, disposal processes, etc.	Retain until superseded.	
23-31G	<u>Meeting Audio or Video Recordings</u> Electronic sound or video recordings of meetings later produced in written official proceedings or minutes.	Retain recordings of statutory boards and commission meetings for 2 years. Other recordings may be destroyed 30 days after approval of the official minutes.	
23-32G	<u>Minutes of Administrative Meetings</u> Meetings of administrative staff, management teams, committees, or working groups. Includes both departmental and inter-departmental meetings.	Retain permanently. <i>Transfer to the Archives when no longer of administrative value.</i>	RC-3 Required by LGRP
23-33G	<u>Minutes of Meetings or Hearings of Appointed Bodies or Commissions</u> Official minutes of proceedings, discussion, decisions, votes, resolutions, or other official actions of appointed boards and commissions during public or executive session meetings.	Retain permanently. <i>Transfer to the Archives when no longer of administrative value.</i>	RC-3 Required by LGRP
23-34G	<u>Organizational Charts (Table of Organization)</u> A diagram that shows the structure of an organization and the relationships and relative ranks of its parts and positions/jobs.	Retain until superseded. <i>Review for historical value.</i>	
23-35G	<u>Payroll Records</u> Including payroll sign in sheets, overtime forms, time cards, time sheets, leave requests and other related items. <u>Does not include original payroll records held by the County Auditor.</u>	Retain for 3 years.	
23-36G	<u>Personal Property</u> Employees' copies of personal material, certificates, training documentation, etc.	Retain until no longer of administrative value.	

23-37G	<p><u>Personnel Files—Employees under Board of County Commissioners</u> 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. <u>Does not include the long term personnel records held by the Personnel Department.</u></p>	Retain for 2 years following the termination of employment (provided that all required documentation has been forwarded to the Personnel Department).	
23-38G	<p><u>Policy and Procedures Manuals</u> 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. <i>Transfer to the Archives when no longer of administrative value.</i></p> <p>Retain all reference copies until superseded.</p>	
23-39G	<p><u>Pre-Employment Applications</u> For unsuccessful applicants, who are not called for interviews.</p>	Retain for 2 years, and then destroy, provided there are no pending complaints or litigation. Data maintained in NeoGov.	
23-40G	<p><u>Press and News Releases</u> Information disseminated to the public through media outlets</p>	Retain until no longer of administrative value. <i>Appraise for historical value and transfer to the Archives.</i>	
23-41G	<p><u>Professional Association Records</u> Individual membership records.</p>	Retain until no longer of administrative value.	

23-42G	Public Records Requests Office copies. <i>For assistance with non-routine or voluminous requests contact the County Prosecutor's Office and the Records and Manager and Archivist.</i>	Retain for 3 years.	
23-43G	Public Records Log A listing of all public records requests received by a public office and the actions taken to respond to the request.	Retain for 3 years.	
23-44G	Public Relations and Training Materials Materials and resources compiled or created for presentations, speeches, public relations events, and/or training exercises.	Retain until superseded. <i>Appraise for historical value and transfer to the Archives.</i>	
23-45G	Publication Stock Stocks of various publications and printed brochures created or received.	Retain until no longer of administrative value. <i>Transfer one copy to the Archives.</i>	
23-46G	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. <i>Does not include definitive schedules held by the Office of Records and Information.</i>	Retain until superseded.	
23-47G	Reference, Library, or Museum Material Information and items acquired for individual use or exhibition, including convenience copies, textbooks, periodicals, and technical reference materials.	Retain until no longer of administrative value.	
23-48G	Scrapbooks Compilation of materials for retention of institutional memory.	Permanent. <i>Transfer to the Archives when no longer of administrative value.</i>	RC-3 Required by LGRP
23-49G	Social Media Posts & Records Information posted or received that is considered to be an original record. Social media is not a record series. It is an electronic means of communicating with the public, both official records and non-records.	Retain permanently in social media archiving system.	

23-50G	<u>Social Media Account Records</u> 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 & Updates, etc.	Retain 1 year after account is terminated, provided no action pending.	
23-51G	<u>Surveillance Video Recordings</u> Footage documenting daily actions of employees and visitors within an office and on its grounds for security purposes.	Retain for 1 cycle.	
23-52G	<u>Surveys & Questionnaires</u> Records collected from employees or public to assess how an event or program is perceived to determine if improvements or changes should be made.	Retain until no longer of administrative value.	
23-53G	<u>Telephone Record Logs</u> Records documenting the date and time of all inbound and outbound calls.	Retain for 1 year, provided no action pending.	
23-54G	<u>Travel and Training Expense Records</u> 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. <i>Does not include travel/training records held by the Office of the County Commissioners.</i>	Retain for 3 years.	
23-55G	<u>Technical Hardware Documentation</u> 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.	
23-56G	<u>Vehicle Maintenance Records</u> Records noting repairs to and routine maintenance of county-owned vehicles.	Retain until vehicle is sold or disposed of.	
23-57G	<u>Vehicle Mileage Records</u> Log of mileage and expenses incurred in county-owned vehicles.	Retain until vehicle is sold or disposed of.	

23-58G	<p><u>Volunteer/Intern Records</u> Records may include application for volunteer/intern service, liability waiver/release, hours worked, disciplinary actions, and evaluations.</p>	Retain for 3 years after termination of service.	
23-59G	<p><u>Vouchers—Shared Purchase</u> 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.</p>	Retain for 10 years.	