



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

OCT 17 2014

NOV 17 2014

STATE AND LOCAL
 GOVERNMENT RECORDS

12/18/14

RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

Section A: Local Government Unit

<u>Mt. Healthy</u> (local government entity)	<u>Administration</u> (unit)
<u>[Signature]</u> (signature of responsible official)	<u>Bill Kocher</u> (name)
	<u>City Manager</u> (title)
	<u>9/24/14</u> (date)

Section B: Records Commission

<u>[Signature]</u> Records Commission	<u>(513) 931-8840</u> (telephone number)
<u>7700 Perry Street</u> (address)	<u>Mt. Healthy</u> (city)
	<u>45231</u> (zip code)
	<u>Hamilton</u> (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.

<u>[Signature]</u> Records Commission Chair Signature	<u>11-12-14</u> Date
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Section C: Ohio Historical Society - State Archives

<u>[Signature]</u> Signature	<u>Government Records Archivist</u> Title	<u>11/21/2014</u> Date
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Section D: Auditor of State

<u>[Signature]</u> Signature	<u>12-10-14</u> Date
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**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**

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.
(unit)

Section E: Records Retention Schedule

Mt. Healthy
(local government entity)

(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
AD-14-1	Accident Files	2 years, provided no action pending	Paper		<input type="checkbox"/>
AD-14-2	Administrative Memoranda and Executive Orders	Until superseded; Appraise for historical value	Paper		<input type="checkbox"/>
AD-14-3	Annual Budget	Permanent	Paper		<input checked="" type="checkbox"/>
AD-14-4	Annual Report	Permanent	Paper		<input checked="" type="checkbox"/>
AD-14-5	Bids, Successful (Equipment, Labor, Service)	15 years	Paper		<input type="checkbox"/>
AD-14-6	Bids, Unsuccessful	2 years after letting contract	Paper		<input type="checkbox"/>
AD-14-7	Certifications of Publishing Legal Notice	2 years	Paper		<input type="checkbox"/>
AD-14-8	Contracts and Agreements	15 years after expiration	Paper		<input type="checkbox"/>
AD-14-9	Council Agendas	2 years	Paper		<input type="checkbox"/>
AD-14-10	Email* (All Departments)	5 years	Electronic		<input type="checkbox"/>
AD-14-11	General Correspondence	1-5 years	Paper		<input type="checkbox"/>
AD-14-12	Grants	Expiration of grant plus audit period	Paper		<input type="checkbox"/>
AD-14-13	Grievance Hearing Files	Until resolved	Paper		<input type="checkbox"/>

(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 Requir ed by OHS- LGRP
AD-14-14	Insurance Certificates	2 years after expiration provided no claims pending	Paper		<input type="checkbox"/>
AD-14-15	Insurance Enrollment Record	Until employee terminates	Paper		<input type="checkbox"/>
AD-14-16	Insurance Policies	2 years after expiration provided all claims settled	Paper		<input type="checkbox"/>
AD-14-17	Labor Union Agreements	3 years	Paper		<input type="checkbox"/>
AD-14-18	Leases	2 years after expiration	Paper		<input type="checkbox"/>
AD-14-19	Legal Notices (Copies)	5 years	Paper		<input type="checkbox"/>
AD-14-20	Licenses	1 year after expiration	Paper		<input type="checkbox"/>
AD-14-21	Personnel Records	Permanent	Paper		<input type="checkbox"/>
AD-14-22	Petty Cash Ledger	3 years after last entry	Paper		<input type="checkbox"/>
AD-14-23	Phone Logs	2 years	Paper		<input type="checkbox"/>
AD-14-24	Reports (Department, Committee)	1-5 years	Paper		<input type="checkbox"/>
AD-14-25	Project Plans, Drawings and Maps	Life of project, Appraise for historical value	Paper		<input type="checkbox"/>
AD-14-26	Property inventories	Until superseded, provided audited	Paper		<input type="checkbox"/>
AD-14-27	Purchases and Bids	Until audited	Paper		<input type="checkbox"/>

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(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 Requir ed by OHS- LGRP
AD-14-28	Reference Materials	Until superseded or replaced	Paper		<input type="checkbox"/>
AD-14-29	Reports (Department, Committee)	Until superseded or replaced	Paper		<input type="checkbox"/>
AD-14-30	Soliciting Permits	1 year after date of expiration	Paper		<input type="checkbox"/>
AD-14-31	Tax Collection Records, Tax Receipts, W-2 Tax Forms	6 years if audited	Paper		<input type="checkbox"/>
AD-14-32	Waste Collection Records	3 years if audited	Paper		<input type="checkbox"/>

***Email** is a *format* on which records are sent, received and/or drafted using electronic mailing systems. Email is NOT a record series. Instead, each *individual* e-mail should be evaluated according to its content and retained in accordance with the record series adopted within this schedule that the content most closely fits. (*Email should be retained electronically rather than on paper as conversion to paper may cause loss of electronically attached metadata that is important to the authenticity of the record.*)

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