



Ohio Historical Society
State Archives of Ohio

Local Government Records Program
800 E. 17th Avenue
Columbus, Ohio 43211-2497

INSTRUCTIONS—RC-2

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.



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RECORDS RETENTION SCHEDULE (RC-2) – Part 1

See instructions before completing this form. Must be submitted with PART 2

Section A: Local Government Unit (To complete this form online, use “tab” key to jump from box to box.)

Butler County

Mental Health & Addiction Recovery Svcs

(local government entity)

(unit)

(signature of responsible official)

(name)

(title)

(date)

Section B:

Butler County Mental Health & Addiction Recovery Services Board

513-860-9240

(telephone number)

5963 Boymel Drive

Fairfield

45014

Butler

(address)

(city)

(zip code)

(county)

To have this form returned to the Records Commission electronically, include an email address: freezer@butlercountyohio.org
mrhodus@BCMHB.org

I hereby certify that the Butler County Mental Health Board & Record 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.

Mental Health & Addiction Recovery Svcs Board Chair, Signature

Date

Section C: Ohio Historical Society - State Archives

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

Section E: Records Retention Schedule

SAO/LGRP-RC2-(Inst.) Revised September 2011



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Butler County Mental Health & Addiction Recovery Srvs. Board

(local government entity)

(unit)

The retention periods specified herein are either required by statute or have been determined by best practice.

Permanent records existing solely in electronic format may become inaccessible through media decay and/or hardware/software obsolescence. It's recommended that digital records with greater than 10 year retention also be maintained in a paper or ANSI approved/recommended format.

Unless prohibited by statute, industry standards, or other regulatory mandates records with less than 10 year retention that's transferred from paper to electronic format can be disposed after record saved in digital format.

Records may not be disposed of until all audits and audit discrepancies have been settled and released or if a lawsuit or agency proceeding is pending, a legal hold on relevant records is required.

(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
GENERAL		Records commonly found in local government offices, agencies or board that document general business or day-to-day operations of divisions and/or departments.			
ADM.01	ACCIDENT REPORTS/FILES Report of personal or property damage involving county vehicle or occurring on county property.	5 years after all claims settled	Paper Electronic		<input type="checkbox"/>
ADM.02	ACCIDENT REPORTS/FILES Non-employee	5 years, provided no action pending.	Paper Electronic		<input type="checkbox"/>
ADM.03	ACTIVITY REPORTS Reports of detail financial, statistical, and/or other operational data. Report complied with activity information from other departments or divisions.	2 years	Paper Electronic		<input type="checkbox"/>
ADM.04	AGENDA (Meeting) Outline of topics to be discussed and/or acted upon during staff meeting.	2 years	Paper Electronic		<input type="checkbox"/>
ADM.05	ANNUAL INVENTORY ORC 305.18 – Department inventory of all material, machinery, tools, or other county supplies maintained by specific county department, officer, or elected official.	3 years	Paper Electronic Database		<input type="checkbox"/>
ADM.06	ANNUAL REPORT Substantive information of operations, policies, procedures, and planning	Permanent	Paper Electronic Database		<input type="checkbox"/>
ADM.07	AUDIOVISUAL Materials and resources compiled or created for presentation regarding public relation, outreach, educational, or events.	Until Superseded or Obsolete	Paper Electronic Database Website		<input type="checkbox"/>
ADM.08	BACK-UP DATA Computer generated back-up tapes/data storage medic device that's created, used and maintained for disaster recovery purposes.	30 days or one system back-up cycle then delete, erase, or destroy back-up data	Electronic USB Flashdrive CD Other (storage media devices)		<input type="checkbox"/>



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ADM.09	BIDS (SUCCESSFUL) Documents publicizing bid for specific services or merchandise from vendors, bond information, specification sheets, bid forms, and documents used to award bid. Incorporate into contract file (ADM.12)	5 years	Paper Electronic		<input type="checkbox"/>
ADM.10	BIDS (UNSUCCESSFUL) Documents received for advertised bid but not awarded.	1 year	Paper Electronic		<input type="checkbox"/>
ADM.11	BLANK FORMS Obsolete or superseded forms.	Until obsolete or superseded	Paper Electronic		<input type="checkbox"/>
ADM.12	BUILDING BLUEPRINTS	Retain until obsolete or replaced	Paper		<input type="checkbox"/>
ADM.13	BUSINESS ASSOCIATE AGREEMENTS Under the U.S. Health Insurance Portability and Accountability Act of 1996, a <u>HIPAA</u> business associate agreement (BAA) is a contract between a <u>HIPAA covered entity</u> and a HIPAA business associate (<u>BA</u>). The contract protects personal health information (PHI) in accordance with HIPAA guidelines.	Permanent	Paper		<input type="checkbox"/>
ADM.14	CLAIMS DATA (ARA's, RA's, OPLIST's and extracts) These are electronic remittance advice reports and related claim processing files for adjudication or supporting documentation of the claim adjudication process.	Permanent	Electronic		<input type="checkbox"/>
ADM.15	CLIENT DEMOGRAPHIC DATA	Permanent	Electronic		<input type="checkbox"/>
ADM.16	CLIENT DEMOGRAPHIC DATA/PRINTOUTS/REPORTS	Until no longer of administrative value	Paper		<input type="checkbox"/>
ADM.17	CLIENT GRIEVANCE REPORTS A client or his/her representative may initiate a grievance by contacting the Client's Rights Office at the Board Office and complete a written grievance. This report is a Client Grievance Report	Permanent	Paper		<input type="checkbox"/>
ADM.18	CLIENT CLINICAL & MEDICAL RECORD	20 Years after last contact with consumer	Paper		<input type="checkbox"/>
ADM.19	COMMUNITY PLANS Each Alcohol, Drug Addiction and Mental Health Services (ADAMHS) Board, Alcohol and Drug Addiction Services (ADAS) Board and Community Mental Health Services (CMHS) Board is required by Ohio law to prepare and submit to the Ohio Department of Mental Health & Addiction Services a plan for the provision of alcohol drug addiction and mental health services in its area. The plan, which constitutes the Board's application for funds, is prepared in accordance with procedures and guidelines established by OHIO MHAS	Permanent	Paper and/or electronic		<input type="checkbox"/>
ADM.20	COMPARISON DATA (when required by policy for purchasing) other than formal bid requests	3 Years after bid awarded	Paper		<input type="checkbox"/>



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ADM.21	COMPLIANCE REPORTS Standard reported filed by regulatory offices	5 years	Paper Electronic		<input type="checkbox"/>
ADM.22	CONTRACTS/ AGREEMENTS/LEASES (awarded via Board approval) Legal agreement with individuals, organization, or entities to procure goods (per bid process or other agreement), services, or equipment, statement of qualifications and contract awarded per legislative action (Resolution) as recorded in Minutes of a Commissioner Meeting.	8 years after contract expires	Paper Electronic		<input type="checkbox"/>
ADM.23	CONTRACTS/AGREEMENTS Professional services or any contract/agreement that doesn't require Board approval.	5 years after services received	Paper Electronic		<input type="checkbox"/>
ADM.24	COPIES AND DRAFT DOCUMENTS Preliminary working documents or additional copies of records or images and other documents which serve to convey information of temporary importance which are no longer required and serve no useful purpose.	Until no longer of administrative value	Paper Electronic		<input type="checkbox"/>
ADM.25	CORRESPONDENCE (TRANSIENT) Messages or information received or sent by any media including paper, telephone, memoranda, fax, email, text, etc. and communications convey information of temporary importance in lieu of oral communication and serve no useful purpose or document functions of the office.	Until no longer of administrative value	Paper Electronic Audio		<input type="checkbox"/>
ADM.26	CORRESPONDENCE (GENERAL OR SUBSTANTIVE) Messages or information received or sent by any media including paper, telephone, memoranda, fax, email, text, etc. that deals with aspects of administration of the office its policies or procedures.	Retain according to content and record series	Paper Electronic Audio		<input type="checkbox"/>
ADM.27	DELIVERY SLIPS/PACKING SLIPS Form received or sent with goods.	Until no longer of administrative value	Paper Electronic		<input type="checkbox"/>
ADM.28	DIRECTORIES/LISTS/ROSTERS Employee name, telephone number, and email, staff roster, committee membership, assignments, etc.	Until no longer of administrative value	Paper Electronic		<input type="checkbox"/>
ADM.29	DISASTER PLAN (CONTINUITY OF OPERATIONS PLAN, BUSINESS CONTINUITY PLAN) Documents plan and procedures to protect and reestablish county operations in event of emergency.	Until updated and superseded	Paper Electronic		<input type="checkbox"/>
ADM.30	EMPLOYEE GRIEVANCE & CIVIL RIGHTS COMPLAINTS	Permanent	Paper		<input type="checkbox"/>
ADM.31	EQUIPMENT OR VEHICLE MAINTENANCE Records documenting ownership, warranties for routine maintenance or repair of county owned or lease equipment or vehicles.	Life of equipment and/or vehicle or until no longer in county inventory	Paper Electronic		<input type="checkbox"/>



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ADM.32	HIPAA PRIVACY VIOLATIONS Following a breach of unsecured protected health information, covered entities must provide notification of the breach to affected individuals, the Secretary, and, in certain circumstances, to the media. In addition, business associates must notify covered entities if a breach occurs at or by the business associate.	Permanent	Paper		<input type="checkbox"/>
ADM.33	INSURANCE POLICIES Documents listing terms and conditions between county offices and insurance providers, records pertaining to administration of the policy.	5 years after expiration and all claims settled	Paper Electronic		<input type="checkbox"/>
ADM.34	LEASES Including leases for equipment.	Permanent 5 years after the lease terminates	Paper		<input type="checkbox"/>
ADM.35	LITIGATION Records related to legal claims against an office or individual and subsequent legal actions and court proceedings.	5 years after case closed and all appeals exhausted	Paper Electronic		<input type="checkbox"/>
ADM.36	MANUALS, HANDBOOKS, SAFETY POLICY Documents related to activities and operations of departments that may include rules regarding behavior, instructions for operating equipment and information about properties of chemicals, toxicity, first aid, and storage and disposal procedures.	Until superseded, obsolete, or updated	Paper Electronic		<input type="checkbox"/>
ADM.37	MAILING LISTS List of individuals or businesses and addresses for mail distribution.	Until no longer of administrative value	Paper Electronic		<input type="checkbox"/>
ADM.38	MAINTENANCE & REPAIR REQUESTS (facilities)	3 years	Paper		<input type="checkbox"/>
ADM.39	MAJOR UNUSUAL INCIDENTS A major unusual incident (O.A.C.5123:2-17-02) is defined as any alleged, suspected, or actual occurrence of an incident that adversely affects the health and safety of an individual. There are nineteen types of incidents defined in the rule that are considered major unusual incidents (MUIs). All of the incidents require that immediate action is taken to protect individuals from further harm, that an investigation is conducted to determine the cause of the incident and contributing factors, and that a prevention plan is developed to reduce the likelihood of future occurrences.	Permanent	Paper		<input type="checkbox"/>
ADM.40	NEEDS ASSESSMENTS/SURVEYS ORC 340.03(b) In cooperation with other local and regional planning and funding bodies and with relevant ethnic organizations, assess the community addiction and mental health needs, evaluate strengths and challenges, and set priorities for community addiction and mental health services, including treatment and prevention.	Permanent	Paper		<input type="checkbox"/>
ADM.41	PRESS RELEASES/PUBLICATIONS Brochures and promotional material created by county agencies to inform the public of services and functions.	Until superseded, obsolete, or updated. Retain one copy permanently for reference	Paper Electronic USB CD Website		<input type="checkbox"/>



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ADM.42	PROJECT INFORMATION (other than grants)	5 years and until no administrative value	Paper and/or electronic		<input type="checkbox"/>
ADM.43	QUALITY IMPROVEMENT (QI) DATA (for example, waiting list data, utilization review data, utilization management data, chart audit data, provider QI reporting, etc.)	Retain until summarized into reports	Paper and/or electronic		<input type="checkbox"/>
ADM.44	QUALITY IMPROVEMENT (QI) DATA SUMMARIES/REPORTS	5 years and until no longer administrative value	Paper and/or electronic		<input type="checkbox"/>
ADM.45	RECORD REQUESTS Requests received to inspect and review public records.	2 years after request processed	Paper Electronic		<input type="checkbox"/>
ADM.46	RECORD RETENTION AND DISPOSITION FORMS Documents also called RC-1, RC-2, and RC-3 that document retention and disposition of office records.	Permanent	Paper Electronic		<input type="checkbox"/>
ADM.47	REFERENCE MATERIALS	Until no longer of administrative value	Paper and/or electronic		<input type="checkbox"/>
ADM.48	REQUESTS FOR BIDS/PROPOSALS	3 years after awarded	Paper and/or electronic		<input type="checkbox"/>
ADM.49	SAFETY INSPECTIONS/DRILLS	3 years	Paper		<input type="checkbox"/>
ADM.50	SURVEILLANCE TAPES/VIDEOS Footage documenting daily actions of employees or public to monitoring security.	1 year	Audio		<input type="checkbox"/>
ADM.51	SPEECHES/PRESENTATIONS Written or records materials distributed when speaking to a group or press conference concerning an office and/or its operations.	Until no longer of administrative value	Paper Electronic USB CD Website		<input type="checkbox"/>
ADM.52	TRAVEL REQUESTS/EXPENSE REPORTS Requests for reimbursement for employee travel	3 years	Paper Electronic		



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ADM.53	Automated payment and Management System Multi-system of outpatient payment information of behavioral health care services for both Medicaid and non-Medicaid services maintained in Multi-Agency Community Services Information System (MACSIS) or any other claim adjudication software approved by the Board A. Claims Adjudication Files B. Reports C. Disclosure of Information Statement D. Outcomes File Log E. Pricing/Rate Related Documents F. Provider Request/Modification G. Provider Request/Modification H. Provider Test File Report I. User Account Request	Until no longer of administrative value Until no longer of administrative value 1 year after employee terminates 2 years 3 years 3 years 3 years 1 year after provider passes test phase 1 year after employee terminates	Paper Electronic		<input type="checkbox"/>
ADM.54	Network Activity Logs	Until no longer of administrative value but no longer than 60 days	Electronic		<input type="checkbox"/>
FISCAL Records commonly generated by local government offices and agencies that document operations of financial transactions, budgets, or reports.					
FIS.01	AUDIT REPORTS (FEDERAL, STATE, & INTERNAL) Financial examinations and reports issued by the Federal Government, Auditor of State, independent auditing agencies or audits conducted internally.	5 years	Paper Electronic		<input type="checkbox"/>
FIS.02	BUDGET (ANNUAL, DEPARTMENTAL/OFFICE) Fiscal allocation to a department or office for fiscal year.	3 years	Paper Electronic		<input type="checkbox"/>
FIS.03	BUDGET PREPARATION DOCUMENTS Working papers and preparation documents used to create, prepare, and submit annual budget.	2 years	Paper Electronic		<input type="checkbox"/>



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FIS.04	FINANCIAL RECORDS Documents pertaining to financial transactions including accounts receivable, bank statements, pay-ins to treasury; purchase orders; requisitions; invoices; warrants/billbacks; schedule of warrants paid; detail reports of financial transactions; cash and account books; receipts; canceled checks; vouchers; appropriation adjustments; transfers; encumbered and unencumbered amounts; remaining balances; monthly expenditures; petty cash, purchase orders, etc.	3 years after audited	Paper Electronic		<input type="checkbox"/>
FIS.05	FUEL USAGE and Travel Training Records Requests for reimbursement for employee travel, reports/expenditures for county vehicle fuel.	3 years	Paper Electronic		<input type="checkbox"/>
FIS.06	GRANT APPLICATION (NOT FUNDED) Application and other documents submitted.	1 year	Paper Electronic		<input type="checkbox"/>
FIS.07	GRANT FILES Records that document the application, evaluation, awarding, monitoring, and tracking of grants received.	Maintain records as required by grant. If retention unspecified, 5 years after grant expires provided all State or Federal audits have been released and litigation, claims or audit findings resolved.	Paper Electronic		<input type="checkbox"/>
FIS.08	FINANCIAL STATUS/ACTIVITY REPORTS Records of studies/reports used to measure county staff activity or programs and data used to calculate percentage of funds to be received or distributed to programs, divisions, entities, or local governments.	3 years after audited	Paper Electronic		<input type="checkbox"/>
FIS.09	TAX EXEMPT CERTIFICATES	Original to vendor; retain until no longer of administrative value	Paper		<input type="checkbox"/>
FIS.10	AUDITORS CERTIFICATES Certification from Auditors Office of estimated resources.	2 years	Paper Electronic		<input type="checkbox"/>
PERSONNEL					
Record of employment maintained by appointing authority.					
PER.01	EMPLOYEE BADGES, ID/ACCESS CARDS Identification badges, keyless entry devices or any related records	Until employee terminates	Paper Electronic Plastic Card		<input type="checkbox"/>
PER.02	EMPLOYEE NOTIFICATIONS, BULLETINS, AND NOTICE TO EMPLOYEES Announcements and informational notices including unsolicited announcements related to job functions.	Until no longer of Administrative value	Paper Electronic		<input type="checkbox"/>
PER.03	EMPLOYEE EVALUATIONS Records used to measure employee work performance	Permanent (active employee Personnel file)	Paper Electronic		<input type="checkbox"/>
PER.04	EMPLOYMENT APPLICATIONS (NOT HIRED) Solicited or unsolicited applications or resumes submitted by individuals for positions but not hired.	2 years	Paper Electronic		<input type="checkbox"/>



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PER.05	EMPLOYMENT APPLICATIONS (SUCCESSFUL) Applications or resumes submitted by individuals chosen for employment.	Permanent (in Personnel File)	Paper Electronic		<input type="checkbox"/>
PER.06	ORGANIZATIONAL CHART (TABLE OF ORGANIZATION) Diagram that shows structure of an organization, division, or department and relationships, relative ranks specific to positions.	Until superseded	Paper Electronic		<input type="checkbox"/>
PER.07	JOB DESCRIPTIONS Records that documents the classification needed/ experience/education/physical requirements, and duties specific to position title.	Until superseded or classification abolished	Paper Electronic		<input type="checkbox"/>
PER.08	PERSONNEL FILE – ACTIVE EMPLOYEE Documents employee service, evaluation, job description, classification, compensation, application/resume, continuing education or other professional association and certifications. A. Attendance/Leave Records/Time Cards/Payroll Records B. DISCIPLINARY ACTIONS/HEARINGS c.1. Audio, video, and/or other recordings c.2. Report of proceedings c.3. Transcripts C. JOB DESCRIPTION/CLASSIFICATION D. Medical Records, FMLA records E. Evaluation F. CONTINUING EDUCATION & PROFESSIONAL ASSOCIATION RECORDS (CERTIFICATIONS/CLASS/TRAINING/ SEMINARS/TRAINING ATTENDANC, ETC.	2 years 2 years or as mandated by contract or other legal agreement Permanent 2 years 2 years after employment terminates Until superseded or obsolete	Paper Electronic		<input type="checkbox"/>
PER.09	PERSONNEL FILE – NO LONGER EMPLOYEE Two years after employee terminates, job description/classification, retirement waivers, service records, and leave balances – all other documents purged and destroyed.	Permanent			
PER.10	WORKERS COMPENSATION CLAIMS Records of claims for Workers Compensation benefits such as claim form, investigations, hearings, results, requirements, terms, conditions, etc.	5 years after last activity or claim settled	Paper Electronic		<input type="checkbox"/>



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Board Records

Documents Board Meetings, reports, and planning.

BRD.01	Annual Board Report Yearly report of Board members, community services and outcomes, and financial overview	Permanent	Paper Electronic Digital		<input type="checkbox"/>
BRD.02	Board of Directors Committee and Regular Meeting Minutes, Agenda's and Resolutions Draft Agenda or Minutes	Permanent	Digital Paper Maintained 4 years after transcribed and approved in Board Meeting Minutes		<input type="checkbox"/>
BRD.03	Board Meeting Attendance Records, Board Member Files	Permanent	Electronic then converted to paper		<input type="checkbox"/>
BRD.04	Board Member Applications (not appointed)	2 years after application not accepted	Paper		<input type="checkbox"/>
BRD.05	Case Files Files from agency or service coordination team that document consumer and services to agree with ADM.18.	20 years after last contact with consumer	Paper Electronic		<input type="checkbox"/>
BRD.06	Monthly and Weekly Reports Documents status of on-going projects and issues, advise supervisors of various events or issues	1 year	Paper Electronic		<input type="checkbox"/>
BRD.07	Oaths of Office of Board Members	Permanent (retained in individual files of board members)	Paper		<input type="checkbox"/>
BRD.08	Client Rights Annual Report	Until Superseded or obsolete	Paper Electronic Digital		<input type="checkbox"/>
BRD.09	Quarterly Reports	5 years after incorporated into Annual Report	Paper Electronic		<input type="checkbox"/>
BRD.10	Strategic Plan	Until Superseded or obsolete	Paper Electronic Digital		<input type="checkbox"/>



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