

**AGENDA
RECORDS COMMISSION**

April 19, 2023 AT 2:00 P.M.

1. Call meeting to order
2. Roll Call
3. Approve the Minutes of October 19, 2022
4. Application for One-Time Disposal of Obsolete Records (**RC1**)

DEPARTMENT

SCHEDULE NUMBER	DESCRIPTION	MEDIA TYPE TO BE DISPOSED	MEDIA TYPE TO BE RETAINED
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MHARS

100-21	MACSIS Transfers	Paper	None
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5. Application for Retention (**RC2**)

DEPARTMENT

SCHEDULE NUMBER	DESCRIPTION	RETENTION PERIOD	MEDIA
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Auditor

AUD-003	Abstracts of House Trailer Tax	3 years	Paper and Electronic
AUD-003	Abstracts of House Trailer Tax	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-006	Addition and Deduction Lists (Record of Additions and Deductions)	6 years	Paper and Electronic
AUD-006	Addition and Deduction Lists (Record of Additions and Deductions)	6 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-008	Addition/Correction Orders (Remitters)	2 years	Paper and Electronic
AUD-008	Addition/Correction Orders (Remitters)	change to: 2 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-009	Analysis Records	3 years	Paper and Electronic
AUD-009	Analysis Records	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-010	Animal Claims (Sheep Claims)	3 years	Paper and Electronic
AUD-010	Animal Claims (Sheep Claims)	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic

AUD-015	Application for Consent to Transfer Property or Other Interest of a Resident Decedent (Estate Tax Form 12; Consent to Transfer Assets)	5 years (permanent record is maintained by the Probate Court)	Paper and Electronic
AUD-015	- Application for Consent to Transfer Property or Other Interest of a Resident Decedent (Estate Tax Form 12; Consent to Transfer Assets)	change to: 5 years (permanent record is maintained by the Probate Court) or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-017	Application for Energy Consumption-Discount Home Owners	2 years	Paper and Electronic
AUD-017	- Application for Energy Consumption-Discount Home Owners	change to: 2 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-018	Application for Exemption	6 years	Paper and Electronic
AUD-018	- Application for Exemption	change to: 6 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-019	Application for 2.5% Tax Reduction on Home (2.5% Reduction Applications)	2 years	Paper and Electronic
AUD-019	- Application for 2.5% Tax Reduction on Home (2.5% Reduction Applications)	change to: 2 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-020	Application for the Valuation of Land in accordance with its Agricultural Use (Form 109A; Current Agricultural Use Valuation/CAUV Renewal Applications)	6 years	Paper and Electronic
AUD-020	- Application for the Valuation of Land in accordance with its Agricultural Use (Form 109A; Current Agricultural Use Valuation/CAUV Renewal Applications)	change to: 6 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-021	Application for Urban Renewal Tax Exemptions	6 years	Paper and Electronic
AUD-021	- Application for Urban Renewal Tax Exemptions	change to: 6 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-023	Appraisals - Inheritance Tax	One year (after tax is paid, provided audited. Duplicate info on file in the Probate Court)	Paper and Electronic
AUD-023	- Appraisals - Inheritance Tax	change to: One year (after tax is paid, provided audited. Duplicate info on file in the Probate Court) or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-024	Appraisals - New Building (May be combined with Applications for Deduction for Destroyed Property)	6 years	Paper and Electronic
AUD-024	- Appraisals - New Building (May be combined with Applications for Deduction for Destroyed Property)	change to: 6 years or until electronic scans are completed.	change to: Paper and/or Electronic

AUD-025	Appropriation Ledger - Disbursements (General Ledger, Auditor's Ledger)	5 years	Paper and Electronic
AUD-025	Appropriation Ledger - Disbursements (General Ledger, Auditor's Ledger)	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-026	Appropriation Ledger - Receipts	5 years	Paper and Electronic
AUD-026	Appropriation Ledger - Receipts	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-027	Appropriation Resolutions	2 years	Paper and Electronic
AUD-027	Appropriation Resolutions	change to: 2 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-028	Assessment Certificates (Preliminary - Prescribed Tax Form 904-A)	Until 5 yrs. after the taxes presented thereby have been paid, or litigation concerning the same has been settled.	Paper and Electronic
AUD-028	Assessment Certificates (Preliminary - Prescribed Tax Form 904-A)	change to: Until 5 yrs. after the taxes presented thereby have been paid, or litigation concerning the same has been settled or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-031	Certificate of Advance Tax Payment (Tax Form 903-A)	Until 5 yrs. after the taxes represented thereby have been paid, or litigation concerning the same has been settled.	Paper and Electronic
AUD-031	Certificate of Advance Tax Payment (Tax Form 903-A)	change to: Until 5 yrs. after the taxes represented thereby have been paid, or litigation concerning the same has been settled. or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-032	Charge Backs	3 years	Paper and Electronic
AUD-032	Charge Backs	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-034	Cigarette License Applications	3 years	Paper and Electronic
AUD-034	Cigarette License Applications	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-035	Conveyance Fee Forms	See Transfer Slips	Paper and Electronic
AUD-035	Conveyance Fee Forms	change to: See Transfer Slips or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-036	Delinquent Land Tax Certificates (Master List of Delinquent Tracts)	3 years	Paper and Electronic
AUD-036	Delinquent Land Tax Certificates (Master List of Delinquent Tracts)	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic

AUD-037	Delinquent Vacant Land Tax Certificates (Master List of Delinquent Vacant Tracts)	3 years	Paper and Electronic
AUD-037	Delinquent Vacant Land Tax Certificates (Master List of Delinquent Vacant Tracts)	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-038	Dispository Reports	3 years	Paper and Electronic
AUD-038	Dispository Reports	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-039	Ditch Assessment Record	See Special Assess. Records	Paper and Electronic
AUD-039	Ditch Assessment Record	change to: See Special Assess. Records or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-040	Docket of Bills Filed (May be subdivided by County Home and Welfare)	3 years	Paper and Electronic
AUD-040	Docket of Bills Filed (May be subdivided by County Home and Welfare)	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-041	Dog and Kennel License Registers	2 years (per ORC 955.07; provided audited)	Paper and Electronic
AUD-041	Dog and Kennel License Registers	change to: 2 years (per ORC 955.07; provided audited) or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-042	Dog License Applications	2 years (per ORC 955.07; provided audited)	Paper and Electronic
AUD-042	Dog License Applications	change to: 2 years (per ORC 955.07; provided audited) or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-043	Encumbrance Control File Status Report by Account (Outstanding Purchase Orders - Encumbrances)	5 years	Paper and Electronic
AUD-043	Encumbrance Control File Status Report by Account (Outstanding Purchase Orders - Encumbrances)	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-044	Estate Tax Determinations	5 years after last entry	Paper and Electronic
AUD-044	Estate Tax Determinations	change to: 5 years after last entry or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-045	Estate Tax Records (Inheritance Tax)	5 years	Paper and Electronic
AUD-045	Estate Tax Records (Inheritance Tax)	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-046	Exempt Personal Property Lists (Exempted Property Schedule)	3 years	Paper and Electronic
AUD-046	Exempt Personal Property Lists (Exempted Property Schedule)	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic

AUD-049	Forfeited Recognizances	One year after collected, provided audited	Paper and Electronic
AUD-049	Forfeited Recognizances	change to: One year after collected, provided audited) or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-050	Homestead and Disabled Exemption Applications	Until property sold or person deceased	Paper and Electronic
AUD-050	Homestead and Disabled Exemption Applications	change to: (Until property sold or person deceased) or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-051	Index to Record of Delinquent Lands Sold	5 years	Paper and Electronic
AUD-051	Index to Record of Delinquent Lands Sold	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-055	Journal of Court Warrants Issued	3 years	Paper and Electronic
AUD-055	Journal of Court Warrants Issued	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-056	Journal of Payments into the Treasury	3 years	Paper and Electronic
AUD-056	Journal of Payments into the Treasury	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-057	Journal of Warrants Issued (Journal of Orders Issued)	3 years	Paper and Electronic
AUD-057	Journal of Warrants Issued (Journal of Orders Issued)	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-058	Junkyard License Registered	3 years	Paper and Electronic
AUD-058	Junkyard License Registered	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-060	Land Sales	3 years	Paper and Electronic
AUD-060	Land Sales	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-061	Land Sales - Redeemed	3 years	Paper and Electronic
AUD-061	Land Sales - Redeemed	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-062	List of Licensed Cigarette Sellers	5 years	Paper and Electronic
AUD-062	List of Licensed Cigarette Sellers	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-063	Lost or Destroyed Land Records	See Board of Commissioners, Commissioner's Journal	Paper and Electronic
AUD-063	Lost or Destroyed Land Records	change to: See Board of Commissioners, Commissioner's Journal or until electronic scans are completed.	change to: Paper and/or Electronic

AUD-064	Malt Licenses (Brewer's Wort Licenses)	2 years	Paper and Electronic
AUD-064	Malt Licenses (Brewer's Wort Licenses)	change to: 2 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-065	Monthly Financial Statements (Monthly State of County Finances)	3 years	Paper and Electronic
AUD-065	Monthly Financial Statements (Monthly State of County Finances)	change to: 3 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-066	Mortgage Indebtedness Record (Real Estate Conveyance Forms)	See transfer records	Paper and Electronic
AUD-066	Mortgage Indebtedness Record (Real Estate Conveyance Forms)	change to: See transfer or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-067	Ohio Estate and Additional Tax Estimated Payment Notice	2 years after assessment is paid	Paper and Electronic
AUD-067	Ohio Estate and Additional Tax Estimated Payment Notice	change to: 2 years after assessment is paid or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-068	Ohio Estate Tax Charge (Estate Tax Form 6; Estate Tax Charge Slips)	2 years after assessment is paid	Paper and Electronic
AUD-068	Ohio Estate Tax Charge (Estate Tax Form 6; Estate Tax Charge Slips)	change to: 2 years after assessment is paid or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-069	Ohio Resident Investor's Cards	5 years	Paper and Electronic
AUD-069	Ohio Resident Investor's Cards	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-073	Personal Property Returns (May be subdivided as Oil and Gas, Banks, Insurance, Bridge Companies, Railroads, Telegraph, Telephone, Transit, Farms.)	5 years	Paper and Electronic
AUD-073	Personal Property Returns (May be subdivided as Oil and Gas, Banks, Insurance, Bridge Companies, Railroads, Telegraph, Telephone, Transit, Farms.)	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-074	Public Assistance Programs Financial Reports (Aid to Dependent Children and General Assistance Reports See Monthly Financial Statements)	5 years	Paper and Electronic
AUD-074	Public Assistance Programs Financial Reports (Aid to Dependent Children and General Assistance Reports See Monthly Financial Statements)	change to: 5 years or until electronic scans are completed.	change to: Paper and/or Electronic
AUD-075	Public Employees Retirement System Reports	5 Years	Paper and Electronic
AUD-075	Public Employees Retirement System Reports	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic

AUD-079	Record of Delinquent Lands Sold	5 years, provided audited Change to: 5 years, provided audited or until electronic scans are completed.	Paper and Electronic
AUD-079	Record of Delinquent Lands Sold		Paper and/or Electronic
AUD-080	Record of Relief Disbursements	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-080	Record of Relief Disbursements		Paper and/or Electronic
AUD-081	Records of Fees	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-081	Records of Fees		Paper and/or Electronic
AUD-083	Records of Payment for Children in Homes	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-083	Records of Payment for Children in Homes		Paper and/or Electronic
AUD-085	Relief Orders (May be subdivided and subtitled - Aid to the Blind Orders, Aid for Dependent Children Orders, Aid for the Disabled Orders, rent Relief Orders, Cash Relief Orders, and Child Welfare Orders)	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-085	Relief Orders (May be subdivided and subtitled - Aid to the Blind Orders, Aid for Dependent Children Orders, Aid for the Disabled Orders, rent Relief Orders, Cash Relief Orders, and Child Welfare Orders)		Paper and/or Electronic
AUD-086	Returns of Taxable Property (Personal Property Tax Returns, Form 920)	Until 5 yrs. after the taxes paid, or litigation settled. Change to: Until 5 yrs. after the taxes paid, or litigation settled. or until electronic scans are completed.	Paper and Electronic
AUD-086	Returns of Taxable Property (Personal Property Tax Returns, Form 920)		Paper and/or Electronic
AUD-087	Safe Deposit Box Inventories	2 years after filing Change to: 2 years after filing or until electronic scans are completed.	Paper and Electronic
AUD-087	Safe Deposit Box Inventories		Paper and/or Electronic
AUD-091	Sewer Assessments (Sewer System Rate Assessments; Sewer Improvement Records)	See Special Assess. Records Change to: See Special Assess. Records or until electronic scans are completed.	Paper and Electronic
AUD-091	Sewer Assessments (Sewer System Rate Assessments; Sewer Improvement Records)		Paper and/or Electronic
AUD-092	Sheep Claims	See Animal Claims Change to: See Animal Claims or until electronic scans are completed.	Paper and Electronic
AUD-092	Sheep Claims		Paper and/or Electronic

AUD-093	Sidewalk Assessments (Payment Assessments)	See Special Assess. Records	Paper and Electronic
AUD-093	Sidewalk Assessments (Payment Assessments)	Change to: See Special Assess. Records or until electronic scans are completed.	Paper and/or Electronic
AUD-094	Sidewalk Assessments Records	See Special Assess. Records	Paper and Electronic
AUD-094	Sidewalk Assessments Records	Change to: See Special Assess. Records or until electronic scans are completed.	Paper and/or Electronic
AUD-095	Special Assessments Records	5 years after last assessment recorded therein is paid	Paper and Electronic
AUD-095	Special Assessments Records	Change to: 5 years after last assessment recorded therein is paid or until electronic scans are completed.	Paper and/or Electronic
AUD-096	Split Bills	3 years	Paper and Electronic
AUD-096	Split Bills	Change to: 3 years or until electronic scans are completed.	Paper and/or Electronic
AUD-097	Split Duplicates	Retain until info is recorded on tax list	Paper and Electronic
AUD-097	Split Duplicates	Change to: Retain until info is recorded on tax list or until electronic scans are completed.	Paper and/or Electronic
AUD-098	Stock Lists - Ohio Resident Investors	5 years	Paper and Electronic
AUD-098	Stock Lists - Ohio Resident Investors	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-099	Street Assessments	See Special Assess. Records	Paper and Electronic
AUD-099	Street Assessments	Change to: See Special Assess. Records or until electronic scans are completed.	Paper and/or Electronic
AUD-100	Street Cleaning and Sprinkling Assessment Records	See Special Assess. Records	Paper and Electronic
AUD-100	Street Cleaning and Sprinkling Assessment Records	Change to: See Special Assess. Records or until electronic scans are completed.	Paper and/or Electronic
AUD-103	Tax Lists - Classified	3 years	Paper and Electronic
AUD-103	Tax Lists - Classified	Change to: 3 years or until electronic scans are completed.	Paper and/or Electronic

AUD-104	Tax Lists - Delinquent	3 years, delinquencies are recorded cumulatively Change to: 3 years, delinquencies are recorded cumulatively or until electronic scans are completed.	Paper and Electronic
AUD-104	Tax Lists - Delinquent		Paper and/or Electronic
AUD-105	Tax Lists - Delinquent Classified	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-105	Tax Lists - Delinquent Classified		Paper and/or Electronic
AUD-106	Tax Lists - Personal	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-106	Tax Lists - Personal		Paper and/or Electronic
AUD-108	Tax Registers	2 years Change to: 2 years or until electronic scans are completed.	Paper and Electronic
AUD-108	Tax Registers		Paper and/or Electronic
AUD-109	Township Special Assessment Records	5 years after last assessment recorded therein is paid Change to: 5 years after last assessment recorded therein is paid or until electronic scans are completed.	Paper and Electronic
AUD-109	Township Special Assessment Records		Paper and/or Electronic
AUD-111	Trailer License Applications	2 years Change to: 2 years or until electronic scans are completed.	Paper and Electronic
AUD-111	Trailer License Applications		Paper and/or Electronic
AUD-113	Transfer Slips (Conveyance Fee Forms)	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-113	Transfer Slips (Conveyance Fee Forms)		Paper and/or Electronic
AUD-114	Transfers on Affidavits	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-114	Transfers on Affidavits		Paper and/or Electronic
AUD-115	Treasurer's Daily Statements	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-115	Treasurer's Daily Statements		Paper and/or Electronic
AUD-116	Treasurer's Daily Sheets/Daily Financial Transactions	3 years Change to: 3 years or until electronic scans are completed.	Paper and Electronic
AUD-116	Treasurer's Daily Sheets/Daily Financial Transactions		Paper and/or Electronic

AUD-117	Treasurer's Monthly Statements	3 years	Paper and Electronic
AUD-117	Treasurer's Monthly Statements	Change to: 3 years or until electronic scans are completed.	Paper and/or Electronic
AUD-119	Unpaid Annual Disposal Refuse Charges to be Certified for Collection on Real Vendor History Record	3 years	Paper and Electronic
AUD-119	Unpaid Annual Disposal Refuse Charges to be Certified for Collection on Real Vendor History Record	Change to: 3 years or until electronic scans are completed.	Paper and/or Electronic
AUD-120	Vendor's License Applications	2 years after license canceled, provided audited	Paper and Electronic
AUD-120	Vendor's License Applications	Change to: 2 years after license canceled, provided audited or until electronic scans are completed.	Paper and/or Electronic
AUD-121	Vouchers	3 years	Paper and Electronic
AUD-121	Vouchers	Change to: 3 years or until electronic scans are completed.	Paper and/or Electronic
AUD-122	Weights and Measures Inspections	3 years after date of inspection, provided violations have been corrected	Paper and Electronic
AUD-122	Weights and Measures Inspections	Change to: 3 years after date of inspection, provided violations have been corrected or until electronic scans are completed.	Paper and/or Electronic
AUD-123	Year End Encumbrances Outstanding	5 years, provided audited	Paper and Electronic
AUD-123	Year End Encumbrances Outstanding	Change to: 5 years, provided audited or until electronic scans are completed.	Paper and/or Electronic
AUD-126	Tax Settlement: State Examiner Request Files, Certificates of Filing, Correspondence/Emails	5 years	Paper and Electronic
AUD-126	Tax Settlement: State Examiner Request Files, Certificates of Filing, Correspondence/Emails	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-128	Bookkeeping: Vouchers (incl Attorney Fee Vouchers), Pay-In Receipts	5 years	Paper and Electronic
AUD-128	Bookkeeping: Vouchers (incl Attorney Fee Vouchers), Pay-In Receipts	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic

AUD-129	Bookkeeping: Recaps, Rejections, Purchase Orders, Monthly Balancing Reports, Posting Sheets (Payables & Receivables), Sign out sheets & Warrant Notifications, Purchase Orders, Daily Encumbrance Reports, Office Files, Account Transfers, Appropriations, Payroll Cancelled Checks, Treasurer's Daily Records, Voided Warrants, Payroll Reports, Garnishments	5 years	Paper and Electronic
AUD-129	Bookkeeping: Recaps, Rejections, Purchase Orders, Monthly Balancing Reports, Posting Sheets (Payables & Receivables), Sign out sheets & Warrant Notifications, Purchase Orders, Daily Encumbrance Reports, Office Files, Account Transfers, Appropriations, Payroll Cancelled Checks, Treasurer's Daily Records, Voided Warrants, Payroll Reports, Garnishments	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-132	GIS: Correspondence	5 years	Paper and Electronic
AUD-132	GIS: Correspondence	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-135	Financial: Annual Audit Work Papers	5 years	Paper and Electronic
AUD-135	Financial: Annual Audit Work Papers	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-136	Financial: Oracle System Reports	5 years	Paper and Electronic
AUD-136	Financial: Oracle System Reports	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-137	Administration: Secretary Office Files: Monthly Balancing Reports, Employee Sick & Vacation records, Paid Office Invoices, etc.	5 years	Paper and Electronic
AUD-137	Administration: Secretary Office Files: Monthly Balancing Reports, Employee Sick & Vacation records, Paid Office Invoices, etc.	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-138	Internet: Bank Statements from Internet Access fees & Online Dog Tag Purchases, Balance Sheets to balance against online transactions, Receipts of online transactions, Payins for Internet Access fees (via mail)	5 years	Paper and Electronic
AUD-138	Internet: Bank Statements from Internet Access fees & Online Dog Tag Purchases, Balance Sheets to balance against online transactions, Receipts of online transactions, Payins for Internet Access fees (via mail)	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic

AUD-139	Real Estate/Appraisal: Sales Review/Cards/Parcels/Records; Appraisal Door Hangers	7 years	Paper and Electronic
AUD-139	Real Estate/Appraisal: Sales Review/Cards/Parcels/Records; Appraisal Door Hangers	Change to: 7 years or until electronic scans are completed.	Paper and/or Electronic
AUD-140	Bookkeeping: 1099 Reporting	7 years	Paper and Electronic
AUD-140	Bookkeeping: 1099 Reporting	Change to: 7 years or until electronic scans are completed.	Paper and/or Electronic
AUD-141	Bookkeeping: Financial Upgrade Records (Oracle)	5 years	Paper and Electronic
AUD-141	Bookkeeping: Financial Upgrade Records (Oracle)	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-142	Transfer: Daily Payins (& Register Receipts)	5 years	Paper and Electronic
AUD-142	Transfer: Daily Payins (& Register Receipts)	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-145	Appraisal/New Construction: Building Permits	4 years	Paper and Electronic
AUD-145	Appraisal/New Construction: Building Permits	Change to: 4 years or until electronic scans are completed.	Paper and/or Electronic
AUD-147	Data: Copies of master files or databases, application software, logs, directories, and other records needed to restore a system in case of a disaster or inadvertent destruction (12 back up cycles)	2 Weeks	Paper and Electronic
AUD-147	Data: Copies of master files or databases, application software, logs, directories, and other records needed to restore a system in case of a disaster or inadvertent destruction (12 back up cycles)	Change to: 2 Weeks or until electronic scans are completed.	Paper and/or Electronic
AUD-148	Financial: Closed Escrow Accounts with Contracts for Construction Projects	5 years	Paper and Electronic
AUD-148	Financial: Closed Escrow Accounts with Contracts for Construction Projects	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic
AUD-149	Tax Map: Conveyance Forms, Map Invoice Reports, Tax map Dept Reqs, Map Purchase Receipts, Photocopy Receipts, Tax Punch Cards, Employee Timesheets, Split Tickets, Tax Duplicate Printouts, Parcel ID Printouts	5 years	Paper and Electronic
AUD-149	Tax Map: Conveyance Forms, Map Invoice Reports, Tax map Dept Reqs, Map Purchase Receipts, Photocopy Receipts, Tax Punch Cards, Employee Timesheets, Split Tickets, Tax Duplicate Printouts, Parcel ID Printouts	Change to: 5 years or until electronic scans are completed.	Paper and/or Electronic

AUD-150	Payroll: Emails & Correspondence	2 years	Paper and Electronic
AUD-150	Payroll: Emails & Correspondence	Change to: 2 years or until electronic scans are completed.	Paper and/or Electronic
AUD-151	Payroll: ADP website assistance forms	1 year	Paper and Electronic
AUD-151	Payroll: ADP website assistance forms	Change to: 1 year or until electronic scans are completed.	Paper and/or Electronic
AUD-152	Payroll: Annual Open Enrollment of Benefits including Flexible Spending Accounts	2 year	Paper and Electronic
AUD-152	Payroll: Annual Open Enrollment of Benefits including Flexible Spending Accounts	Change to: 2 year or until electronic scans are completed.	Paper and/or Electronic
AUD-153	Payroll: Bi-weekly Balancing Reports	1 month	Paper and Electronic
AUD-153	Payroll: Bi-weekly Balancing Reports	Change to: 1 month or until electronic scans are completed.	Paper and/or Electronic
AUD-154	Tax Abatement Applications (County Approved) Description: Reduction of or exemption from taxes granted by county for a specified period, usually to encourage economic investment. i.e. Community Reinvestment Area (CRA's)	8 years after expiration	Paper and Electronic
AUD-154	Tax Abatement Applications (County Approved) Description: Reduction of or exemption from taxes granted by county for a specified period, usually to encourage economic investment. i.e. Community Reinvestment Area (CRA's)	Change to: 8 years after expiration or until electronic scans are completed.	Paper and/or Electronic
AUD-155	Tax Abatement Applications (Non-County Approved) Description: Reduction of or exemption from taxes granted by local governments (Other than County) for a specified period, usually to encourage economic investment. i.e. Community Reinvestment Area (CRA's)	3 years	Paper and Electronic
AUD-155	Tax Abatement Applications (Non-County Approved) Description: Reduction of or exemption from taxes granted by local governments (Other than County) for a specified period, usually to encourage economic investment. i.e. Community Reinvestment Area (CRA's)	Change to: 3 years or until electronic scans are completed.	Paper and/or Electronic

AUD-156	Tax Exemption-DTE FORM 24 Description: Application for Real Property Tax Exemption. Request for the exemption of property from taxation under a tax incentive program. i.e. Enterprise Zone Agreement (EZ's) and Tax Increment Finance (TIF's) . The EZ and TIF programs are required to submit a DTE FORM 24 for State approval.	5 years after exemption ends	Paper and Electronic
AUD-156	Tax Exemption-DTE FORM 24 Description: Application for Real Property Tax Exemption. Request for the exemption of property from taxation under a tax incentive program. i.e. Enterprise Zone Agreement (EZ's) and Tax Increment Finance (TIF's) . The EZ and TIF programs are required to submit a DTE FORM 24 for State approval.	Change to: 5 years after exemption ends or until electronic scans are completed.	Paper and/or Electronic
AUD-157	COMMUNICATION RECORDS (CORRESPONDENCE) Messages sent and received in any media, including letters, memoranda, faxes, e-mail messages, miscellaneous communications, etc.	Retain according to content. Ensure metadata retained if applicable.	Paper and/or Electronic
AUD-158	Mobile Homes: certificate of origins, copies of titles, transfer sheets, and photos, retired mobile homes	3 years	Paper and/or Electronic
AUD-159	Applications for Placement of Farmland in an Agricultural District (O. R. C. Section 92902) ODA-AG Adm. Form 11, 5-year term	2 years after the 5-year term expires	Paper and/or Electronic
AUD-160	Real Estate copies of Surplus applications, Certificate of Refunds, Vouchers, and Vendor Request forms. Bookkeeping Department has the originals.	1 year	Paper and/or Electronic

Commissioners/Personnel

HR/ID-APP	Application for Employee identification Badges	When obsolete	Paper
HR/EMP-ID	Employee identification Badges	When obsolete	Paper
HR/Apps	Application for employment	1 Year after receipt	Paper
HR/PAY-04-1	Employee Timesheets (Active/Terminated)	3 Years	Paper
HR/PAY-Reg	Payroll Registers, Recap sheets	3 Years	Paper
HR/PAY-Wkshts	Copies of Auditors Payroll Worksheets	3 Years	Multimedia
HR/PAY/ Sumshts	Personnel Summary Sheets & copies of Resolutions	7 Years	Multimedia
HR/PAY-Rpts	Recorded Reports, FMLA, Medical	7 Years	Paper
HR/PAY-I9	I-9 Employment Eligibility Forms	3 Years after date of hire or 1 Year after termination whichever is later	Paper

HR/Jobs	Job Classifications / Specifications	Until Superceeded	Multimedia
HR/PAY-Pers	Employee Personnel Files ~ including Court employees (Active/Terminated)	10 Years after Termination	Paper
HR/Corr	Correspondence	3 Years	Multimedia
HR/Union	Union Contracts	8 Years after expiration	Paper
HR/Test	Pre-Employment Drug Screen	10 Years	Paper

6. Records Disposal (rc3)– Sent To Ohio Historical Society

<u>Date</u>	<u>Department</u>	<u>Disposal Date</u>
12/06/22	Commissioners Administrator	01/03/23
12/06/22	CBCF	12/31/22
12/06/22	Commissioners Clerk	01/03/23
12/06/22	Golden Acres	12/31/22
12/06/22	Solid Waste	12/31/22
12/06/22	LCT	01/03/23
12/07/22	Budget	01/03/23
12/07/22	LCCDD	12/31/22 & 01/03/23
12/07/22	CFFC	01/03/23
12/07/22	Safety/Risk	12/31/22 & 01/03/23
12/09/22	Benefits	12/31/22 & 01/03/23
12/09/22	Maintenance	01/03/23
12/09/22	Special Projects	01/03/23
12/12/22	Auditor bookkeeping	01/03/23
12/12/22	Auditor licenses	01/03/23
12/12/22	Tax Settlement	01/03/23
12/12/22	BOR	01/03/23
12/12/22	BOE	01/03/23
04/12/23	Probate	12/30/23
04/12/23	Auditor/Real Estate	06/30/23
04/12/23	Auditor/Licensing	12/31/23
04/12/23	Auditor	12/31/23

RC3 (not sent to OHS due to no longer required RC3's)

<u>Date</u>	<u>Department</u>	<u>Disposal Date</u>
12/06/22	Auditor Appraisal	12/16/22
12/06/22	Auditor Appraisal	01/03/23
12/06/22	Port Authority	12/31/22
12/06/22	Recorders	12/31/22
12/07/22	Purchasing	01/03/23
12/07/22	Clerk of Courts	01/03/23
12/07/22	Engineer	01/03/23
12/07/22	Crime Lab	01/03/23
12/07/22	Commissioners Personnel	12/31/22 & 01/03/23
12/09/22	Domestic Relations	01/03/23
12/09/22	DD	01/09/23
12/09/22	Prosecutor	01/03/23
12/09/22	Domestic	01/03/22
12/12/22	Auditor admin	01/03/23
12/12/22	Auditor payroll	12/31/22
12/12/22	LCCS	12/31/22

RC3's cont. not sent to OHS

12/12/22	Health District	01/03/23
12/13/22	Prosecutor	01/03/23
03/13/23	Health District	03/30/23
03/29/23	Domestic Relations	04/14/23
04/04/23	EMA	06/30/23
04/12/23	Auditor/Real Estate	12/31/23

7. **OTHER**

- a. All forms that are to be submitted to the Records Commission can be found at <http://www.loraincounty.us>. Go to Departments, Clerk of Board and left side Records Commission Intake forms needs to be emailed to Records Secretary and approved before boxes taken to Records Center. **Forms updated with OHS new address; RC1, RC2 & RC3**

8. **NEW BUSINESS**

- a. 2023 Sunshine Law/Record Certified Training, Ohio Attorney General can register at this link <https://www.ohioattorneygeneral.gov/legal/sunshine-laws/sunshine-law-training>
April 11, June 28, August 11, September 20, October 23, November 29 and December 21 (virtual)
May 16, Kirtland and August 8 Bowling Green

2023 Sunshine Law/Record Training, State of Ohio Auditor can register at this link

<https://ohioauditor.gov/trainings/publicrecords.html>

April 18, July 11, August 15, November 14 & December 5 (virtual)

May 16 - Lodge at Hocking College, June 13 - Montgomery County, September 14 - Cuyahoga County Public Library, October 17 - City of Maumee Police Department

REMEMBER each Elected Official or Designee need to take everyone once/term

- b. Other

9. **OLD BUSINESS**

- a. other

10. **CORRESPONDENCE/EMAIL:**

- a. none

11. **RECORDS CENTER UPDATE** – Andrew Lipian12. **PUBLIC COMMENT**13. **NEXT MEETING**

Wednesday, October 18, 2023 at 2 p.m.

14. **CALL FOR ADJOURNMENT**