

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC - 3 Required by LGRP
	<b>Administrative General Forms</b>				<input type="checkbox"/>
<b>G-01</b>	<b>Accruals</b> Report of vacation, sick, compensatory, and personal time balance by employee. Final Accrual report kept in permanent personnel file. (Original copy held in Auditor's Office)	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
<b>G-02</b>	<b>Agendas</b> A list of items to be discussed and/or acted upon during a meeting.	2 Year	Paper/Electronic		<input type="checkbox"/>
<b>G-03</b>	<b>Annual Budgets</b>	3 Years	Paper/Electronic		<input type="checkbox"/>
<b>G-04</b>	<b>Annual Reports</b> A report containing substantive information of operations, policies, procedures, and planning	Permanent	Paper/Electronic		<input type="checkbox"/>
<b>G-05</b>	<b>Application for State Subsidy</b>	3 years	Paper/Electronic		<input type="checkbox"/>
<b>G-06</b>	<b>Applications for Employment – Not Hired</b>	6 months	Paper/Electronic		<input type="checkbox"/>
<b>G-07</b>	<b>Audit Reports</b> ORC 117.26. Financial and program examinations and reports issued by the Federal Government, State of Ohio, independent auditing agencies or conducted internally; including subsequent compliance reports	5 years	Paper/Electronic		<input type="checkbox"/>
<b>G-08</b>	<b>Bids (Successful)</b> Records documenting, publicizing, hearing, and awarding quoted bids from vendors for services or merchandise including bonding information, specification sheets, bid form and amounts, references, etc. that require a contract, incorporate into contract file. See ORC 2305.06	8 years, after expiration of contract if signed on or after 9/28/2012; contracts signed prior to 9/28/2012 kept for 15 years after expiration of contract	Paper/Electronic		<input type="checkbox"/>

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<b>G-09</b>	<b>Bids (Unsuccessful)</b>	2 years,	Paper/Electronic		<input type="checkbox"/>
<b>G-10</b>	<b>Board of Health Minutes</b>	Permanent	Paper/Electronic		<input type="checkbox"/>
<b>G-11</b>	<b>Board of Health Meeting Packets</b> Information submitted to Board of Health members prior to their meetings including, but not limited to, agenda, meeting minutes, director reports, finance reports and other documentation related to agenda items	3 years	Paper/Electronic		<input type="checkbox"/>
<b>G-12</b>	<b>Board of Health Resolutions</b>	Permanent	Paper/Electronic		<input type="checkbox"/>
<b>G-13</b>	<b>Brochures and Newsletters</b>	Until superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
<b>G-14</b>	<b>Claims and Litigation Records</b> Records related to legal claims against the Health Department and subsequent court proceedings if necessary	5 years, after case is closed and appeals are exhausted	Paper/Electronic		<input type="checkbox"/>
<b>G-15</b>	<b>Community Health Assessment</b> Report on the status of health conditions and risk behavior in the county	Permanent	Paper/Electronic		<input type="checkbox"/>
<b>G-16</b>	<b>Community Health Improvement Plan</b> Report on the strategies and objectives for the improving of health conditions and risk behaviors in the county	Permanent	Paper/Electronic		<input type="checkbox"/>
<b>G-17</b>	<b>Continuing Education Records</b> Professional development licenses, certifications, trainings, and other documents related to advancement in education connected to job position	Place in personnel file (Follow retention schedule for Personnel Files)	Paper/Electronic		<input type="checkbox"/>

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<b>G-18</b>	<b>Contracts and Agreements</b> Legal agreements with individuals, organizations or entities to procure goods and/or services	8 years, after expiration (ORC 2305.06)	Paper/Electronic		<input type="checkbox"/>
<b>G-19</b>	<b>Correspondence</b> Written communications from external and internal sources; documents actions, policies, procedures and programs with sufficient value for program operations	2 years	Paper/Electronic		<input type="checkbox"/>
<b>G-20</b>	<b>Disaster Plans</b> Plans and procedures to protect and re-establish operations in the event of a disaster.	Until obsolete or superseded	Paper/Electronic		<input type="checkbox"/>
<b>G-21</b>	<b>Disciplinary Hearings (Audio and Video Recordings)</b> A proceeding where an issue of employee discipline is heard and evidence is presented	1 year	Audio and/or Video Tape		<input type="checkbox"/>
<b>G-22</b>	<b>Disciplinary Hearings (Report of Proceedings/Transcripts)</b> A proceeding where an issue of employee discipline is heard and evidence is presented	Place in personnel file( Follow Retention Schedule for Personnel File)	Paper and/or Electronic		<input type="checkbox"/>
<b>G-23</b>	<b>District Advisory Council Meeting Minutes</b> Official record of the proceedings of the General Health District Advisory Council	Permanent	Paper/Electronic		<input type="checkbox"/>
<b>G-24</b>	<b>Electronic Mail (E-Mail)</b> Message with significant administrative, legal, and /or fiscal value.	Transfer to paper format and attach to corresponding record	Paper		<input type="checkbox"/>
<b>G-25</b>	<b>Evaluations</b> Records used to measure employee work performance	Place in personnel file (Follow Personnel File Record Retention Schedule)	Paper and/or Electronic		<input type="checkbox"/>

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<b>G-26</b>	<b>Fee Establishment Cost Methodology for Non-ODH Audited Programs</b>	Until Fee is Revised	Paper/Electronic		<input type="checkbox"/>
<b>G-27</b>	<b>Fee Establishment Cost Methodology for ODH Audited Programs</b>	6 months after ODH audit	Paper		<input type="checkbox"/>
<b>G-28</b>	<b>Financial Reports/Payment Ledgers</b> Records pertaining to financial transactions including accounts receivable and accounts payable; pay-ins to treasury; purchase orders; requisitions; invoices; warrants / billbacks; detail reports (checks written during month, current line item balances); cash and account books; receipts; canceled checks; vouchers; appropriation adjustments; transfers; encumbered and unencumbered amounts; and remaining balances; monthly expenditures statements; petty cash; etc.	3 years, with audit	Paper/Electronic		<input type="checkbox"/>
<b>G-29</b>	<b>Grant Records (Ohio Department of Health, Federal, State and Private)</b>	4 years after final report, provided all State audits have been conducted, the audit reports released and all litigation, claims or audit findings have been resolved	Paper/Electronic		<input type="checkbox"/>
<b>G-30</b>	<b>Grievances</b> Formal complaints and responses regarding work, conduct, interpersonal relations, or disciplinary actions towards an employee or employer; Includes unfounded complaints, investigation reports and pre-disciplinary conference records	3 years after complaint settled, if unfounded or no disciplinary action taken. If action taken, place in personnel file	Paper and/or Electronic		<input type="checkbox"/>
<b>G-31</b>	<b>Final Expense Report/Yearly Report to State</b> All supplemental documentation required for submission of Final Expense Report. Original sent to the State and maintained in GMIS system.	5 years after submission of report	Paper and/or Electronic		<input type="checkbox"/>

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<b>G-32</b>	<b>Inventory (Annual of County Property)</b> Inventory of equipment maintained by the Health Department	3 years, provided audit	Paper and/or Electronic		<input type="checkbox"/>
<b>G-33</b>	<b>Job Descriptions</b> Documents detailing the classification, needed experience/education/physical requirements and duties by position title	Until revised, superseded or classification abolished	Paper and/or Electronic		<input type="checkbox"/>
<b>G-34</b>	<b>Legal Opinions</b>	Until Superseded	Paper and/or Electronic		<input type="checkbox"/>
<b>G-35</b>	<b>Licenses, Permits, Certifications</b> Documents affirming requirements being met as prescribed by issuing agency	1 year after expiration	Paper and/or Electronic		<input type="checkbox"/>
<b>G-36</b>	<b>Payroll Records</b>	6 months after audit	Paper and/or Electronic		<input type="checkbox"/>
<b>G-37</b>	<b>Personnel Files</b> Documentation of service throughout the duration of an individual's employment	Destroy extraneous records 6 years after employee terminates, pending no legal action.	Paper and/or Electronic		<input type="checkbox"/>
<b>G-38</b>	<b>Personnel Files (Retirement Waiver, Service Record and Leave Accrual Summary Sheet)</b>	Permanent	Paper and/or Electronic		<input type="checkbox"/>
<b>G-39</b>	<b>Personnel Policy Manual</b> Rules and guidelines created to standardize and provide protocols for day-to-day operations in relation to personnel issues.	Permanent	Paper and/or Electronic		<input type="checkbox"/>
<b>G-40</b>	<b>Policies, Orders, Directives, Rules, Regulations and Procedures</b> Guiding principles used to set organizational direction	Until superseded, retain one copy until audited.	Paper and/or Electronic		<input type="checkbox"/>