



Ohio History Connection
 State Archives of Ohio
 Local Government Records Program
 800 E. 17th Avenue
 Columbus, Ohio 43211-2474
 614.297.2553
localrecs@ohiohistory.org
www.ohiohistory.org/lgr

OHIO HISTORY CONNECTION
 APRIL 12 2023
 STATE AND LOCAL
 GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)– Part 1

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

Section A and Section B must be filled out and signed by local government before submission to the State Archives

Section A: Local Government Unit

Delaware County

General schedule for all departments and agencies

(Local Government Entity)

(Unit)

[Signature]

Tracie Davies

County Administrator

4/7/23

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

Delaware County

(740) 833-2140

(Telephone Number)

2079 US Rte. 23 North

Delaware

43015

Delaware

(Address)

(City)

(Zip Code)

(County)

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

cshaw@co.delaware.oh.us

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.

[Signature]

4/12/23

Records Commission Chair Signature

Date

Section C: Ohio History Connection - State Archives

Fred Previta

State Archivist

5-2-2023

Signature

Title

Date

Section D: Auditor of State

Records Manager

Signature

Title

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

(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
23-01	Agendas – A listing of items to be discussed and/or acted upon during a meeting	No longer of administrative value	All media types		<input type="checkbox"/>
23-02	Annual Inventory — Departmental inventory of all material, machinery, tools and other county supplies under the jurisdiction of each county office or department. ORC 305.18	Office copy – 2 years and until no longer of administrative value Equipment listed in Facilities Dude Remains in Facility Dude until sold, then discarded or removed from service	All media types		<input type="checkbox"/>
23-03	Annual Reports – Solicited. A report containing substantive information of operations, policies, procedures and planning	Permanent – 1 copy	All media types		<input checked="" type="checkbox"/>
23-04	Annual Reports – Unsolicited. A report containing substantive information of operations, policies, procedures and planning	Until no longer of administrative value	All media types		<input type="checkbox"/>
23-05	Appointment/Desk, Wall and Phone Center - Chronological system of reckoning time and tasks	Until no longer of administrative value. Pending no legal action	All media types		<input type="checkbox"/>
23-06	Audio Visual, Public Relations and Training Material – Material and resources compiled or created for presentations, public relations, training and training exercises	Until superseded, obsolete, replaced or no longer of administrative value	All media types		<input type="checkbox"/>
23-07	Audit Reports – Federal, state and internal	5 years	All media types		<input type="checkbox"/>
23-08	Back-up Data – Computer generated backup tapes and data created. Used and maintained for disaster recovery purposes. Back-up media is not used for permanent or archival retention/storage	Retain for 1 system back-up cycle then override, delete, erase or destroy. Where a lawsuit or agency proceeding is pending, a legal hold on the records is required. Records that may have a bearing on the proceeding should be retained until the	All media types		<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 LGRP	(6) RC-3 Required by LGRP
		legal hold has been removed			
23-09	Badges and ID's – Employee identification badges and keyless entry devices and related documents	Retrieve upon employee termination or when obsolete, then destroy	All media types		<input type="checkbox"/>
23-10	Bids and Proposals – Successful. Records documenting, publicizing, hearing, awarding, quoted bids from vendors for service or merchandise, bonding, information, specification sheets, bid forms, costs, references and any other related information. May be incorporated into contract or project file. ORC 2305.06	6 years after the contract or project completed If incorporated into contract or project file see retention schedule # 23-23	All media types		<input type="checkbox"/>
23-11	Bids and Proposals – Unsuccessful. Bids not awarded	2 years after contract awarded	All media types		<input type="checkbox"/>
23-12	Blank Forms - Obsolete, unneeded, superseded form stock	Until no longer of administrative value	All media types		<input type="checkbox"/>
23-13	Blueprints, Vellums, Drawings, Tracking and Mylar's	Until updated, superseded or obsolete	All media types		<input type="checkbox"/>
23-14	Blueprints - Original. For public buildings	Permanent	All media types		<input checked="" type="checkbox"/>
23-15	Bond Documents - Preliminary official statement, bond purchase agreement, Blue Sky survey, indenture, resolution, loan/lease agreement, mortgage/deed of trust, request to authenticate and deliver bonds, credit enhancement documents, no arbitrage certificate, tax regulatory agreement, Form 8038/8038-G, land use restriction agreement, TEFRA approval, volume cap certificate, resolutions and certificates of the parties, legal opinions, rating letter(s), receipt for the bonds and proceeds, feasibility study, engineer's report, title insurance, financing statements, appraisal and any other related documents	IRS Rule 5.70. Retain for 3 years after the last bond has been retired, or if applicable 3 years after the last bond of the refunding issue has been retired	All media types		<input type="checkbox"/>
23-16	Bond Register -	7 years after final maturity of notes or bonds	All media types		<input type="checkbox"/>
23-17	Budgets - Annual department or office. Fiscal allocations to a department or office for a fiscal year	Office copy – 3 years Commissioner's Journal maintains budget resolution as permanent	All media types		<input type="checkbox"/>

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23-18	Budget Preparation Documents - Working papers. Preparation documents used to create an annual budget	Until no longer of administrative value	All media types		<input type="checkbox"/>
23-19	Bulletins, Posters, Notices and Reference Material – Material used for the purpose of informing people. May include exhibit material	Until no longer of administrative value	All media types		<input type="checkbox"/>
23-20	Claims and Litigation Records – Records related to legal claims against an office, legal actions and court proceedings	5 years after case is closed and all appeals exhausted	All media types		<input type="checkbox"/>
23-21	Compliance Reports - Standard reports required to be filed by or with a regulatory agency	5 years and no longer of administrative value	All media types		<input type="checkbox"/>
23-22	Continuing Education – Professional licenses, certifications, training and other documents noting advancement in education related to profession and/or job position	Placed in personnel file	All media types		<input type="checkbox"/>
23-23	Contracts – Legal agreements that procure goods and/or services. Records documenting publicizing, hearings, awarded quote bid(s) and any additional paperwork relating to the contract	8 years after contract completion or until the completion of any pending legal action	All media types		<input type="checkbox"/>
23-24	<p>Coronavirus Relief Fund Payment Records – Records that support compliance with subsection 601(d) of the Social Security Act as amended (42 U.S.C.801(d)). Records include, but are limited to the following:</p> <ul style="list-style-type: none"> • General ledger and subsidiary ledgers used to act for a) the receipt of Coronavirus Relief Fund payments and b) the disbursement from such payments to meet eligible expenses related to the public health emergency due to COVID-19 • Budget records from 2019 and 2020 • Payroll, time reports, human resource records to support costs incurred for payroll expenses related to addressing the public health emergency due to COVID-19 • Receipts of purchases made related to addressing the public health emergency due to COVID-19 • Contracts and subcontracts entered into using Coronavirus Relief Fund payments and all documents related to such contracts Grant agreements 	<p>Retain 5 years</p> <p>Unlike other records listed on the General Schedule, this retention period supersedes any retention listed on an approved departmental retention schedule</p> <p>An approved Certificate of Records Disposal (RC3) is required in order to destroy records listed in this record series</p>	All media types		<input type="checkbox"/>

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	<p>and grant sub-award agreements entered into using Coronavirus Relief Fund payments and all documents related to such awards</p> <ul style="list-style-type: none"> • All documents of reports, audits, and other monitoring of contracts including subcontracts and grant recipient sub-awards • All documentation supporting the performance outcomes of contracts, subcontracts, grant awards and grant recipient sub-awards • All internal and external email/electronic communications related to use of Coronavirus Relief Fund payments • All investigative files and inquiry reports involving Coronavirus Relief Fund payments 				
23-25	Correspondence (Transient) - Emails, drafts, telephone messages and other limited documents that do not set policy, do not establish guidelines or procedures, do not certify a transaction or do not become a receipt. Message serves to convey information of temporary importance in lieu of another method of communications	<p>Until no longer of administrative value unless correspondence becomes part of an official record.</p> <p>Original sender is responsible party.</p> <p>No RC3 required.</p>	All media types		<input type="checkbox"/>
23-26	Correspondence (Routine)- Emails, referral letters, requests for routine information, publications provided to the public which are answered by a standard letter/response. Does not attempt to influence policy	<p>1 year and until no longer of administrative value unless correspondence becomes part of an official record.</p> <p>Original sender is responsible party</p>	All media types		<input type="checkbox"/>
23-27	Correspondence (Administrative) - Emails, internal and external correspondences from various individuals, companies, and organizations requesting information pertaining to the agency and related inquiries. Correspondence is informative concerning policies, programs, fiscal and personnel matters	<p>2 years and until no longer of administrative value unless correspondence becomes part of an official record.</p> <p>Original sender is responsible party</p>	All media types		<input type="checkbox"/>

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23-28	Correspondence (Executive) - Emails and correspondence of the heads of the agency and their executive staff dealing with significant aspects of the administration concerning policies, programs, fiscal and personnel matters	5 years and until no longer of administrative value unless correspondence becomes part of an official record. Original sender is responsible party	All media types		<input type="checkbox"/>
23-29	Delivery and Packing Slips – Documents received when accepting goods from a carrier or vendor	Until no longer of administrative value provided there are no discrepancies. No RC3 required			<input type="checkbox"/>
23-30	Directories, Lists and Rosters - Lists including such information as phone numbers, email addresses, staff roster, committee membership, assignments, schedules and flowcharts	Until superseded, obsolete or replaced. No RC3 required			<input type="checkbox"/>
23-31	Disaster Plans (Continuity of Operations Plan and Business Continuity Plan) – Documents, plans and procedures to protect and reestablish operations in the event of a disaster	Until updated or superseded			<input type="checkbox"/>
23-32	Disciplinary Hearings - A proceeding where an issue of employee discipline is heard and evidence is presented to help determine the issue. If Human Resources maintains the personnel file, the hearing records are maintained as permanent per their RC2.	Permanent If Human Resources maintaining personnel file then office copy becomes a duplicate copy.	All media types		<input type="checkbox"/>
23-33	Drafts, Informal Notes and Transient Records: Working copies, informal notes, telephone messages, duplicate copies, extra copies for temporary convenience and documents which serve to convey information of temporary importance	Until no longer of administrative value. No RC3 required	All media types		<input type="checkbox"/>
23-34	Elected Officials Bonds – Issued by bonding or surety company in the name of the elected official	Office Copy: As long as the official is holding office. County Treasurer's office maintains for 10 years after the bond expires. The County Treasurer's bond maintained by the County Auditor's office. All other's maintained by	All media types		<input checked="" type="checkbox"/>

(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
		the County Treasurer. Review for historical value			
23-35	Elected Officials Oath of Office – When elected persons take the oath, they swear or affirm that they will faithfully and impartially discharge the duties of the office to the best of their ability. Oath can be administered orally or written. Oath must be filed with the County Auditor	Office copy. As long as official holding office. County Treasurer's office maintains for 2 years after leaving office. The County Treasurer's oath is maintained by the County Auditor. All other's maintained by County Treasurer. Review for historical value	All media types		<input checked="" type="checkbox"/>
23-36	Employee Applications and Resumes (Successful) – Application submissions by individuals chosen for employment. Includes interview notes, reference and all applicable background check information	If using HR – Check with HR to add or remove duplicate copies before sent to microfilm. HR maintains as permanent If not using HR – Hard copy must be maintained until file scanned and sent to microfilm.	All media types		<input type="checkbox"/>
23-37	Employee Applications and Resumes (Unsuccessful) – Application submissions by individuals chosen for employment. Includes interview notes, reference and all applicable background check information	2 years and no longer of administrative value	All media types		<input type="checkbox"/>
23-38	Employee Evaluation - Record(s) used to measure an employee's work performance	If using HR – Check with HR to add or remove duplicate copies before sent to microfilm. HR maintains as	All media types		<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 LGRP	(6) RC-3 Required by LGRP
		permanent If not using HR – Hard copy must be maintained until scanned and sent to microfilm.			
23-39	Equipment Maintenance Records -Files documenting ownership, warranties, routine maintenance and repair to county owned equipment	Life of equipment	All media types		<input type="checkbox"/>
23-40	Fee Schedule - Fees for goods and/or services provided	Until superseded, obsolete or replaced			<input type="checkbox"/>
23-41	Financial Records - Records pertaining to financial transactions including accounts receivable, accounts payable, bank statements, requisitions, warrants, bill backs, listing of warrants to be paid, deposit receipts, detail reports (checks written during month, current line item balances) cash and account books, receipts, receipt books, canceled checks, vouchers, appropriation adjustments, transfers, balances, monthly statements, memo transfers and petty cash	3 years provided audited by the Auditor of State	All media types		<input type="checkbox"/>
23-42	Invoices (Paid)	Office copy – Until audited by the Auditor of State. County Auditor maintains for 4 years after audited	All media types		<input type="checkbox"/>
23-43	Pay-in form to the County Treasurer – Form states amount of money deposited, date, org key, object code, revenue source where funds should be deposited	Office copy – Until audited by the Auditor of State. County Auditor maintains for 3 years after audited	All media types		<input type="checkbox"/>
23-44	Purchase Order – Verification of approval to move forward with a purchase	Office copy – Until audited by the Auditor of State. County Auditor maintains for 5 years	All media types		<input type="checkbox"/>
23-45	Fuel Usage Records – Manager Plus is a fuel software that keeps track of inventory, fuel, mileage and generates a work order when an oil change is needed. To obtain fuel must have a fob and a code. Invoice for fuel goes directly to the Auditor’s office for payment. Fuel delivered to the Service Center is maintained in hard copy	Records in Manager Plus Cloud. Purged when vehicle sold Documentation for fuel delivered to the Service Center is maintained as a hard copy for 5 years.	All media types		<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 LGRP	(6) RC-3 Required by LGRP
23-46	Grant Application (File) – Not Funded	1 year	All media types		<input type="checkbox"/>
23-47	Grant Application (File) – Funded Documents the application, evaluation, awarding, monitoring, tracking of financial records and any related material	Maintain as required by the grant. If retention is not specified retain for 5 years provided all local, state and federal audits have been conducted, the audit report released and all litigation, claims or audit findings have been resolved	All media types		<input type="checkbox"/>
23-48	Image Files – Visual documents. Photographs, slides, video tapes of a person or place	Until no longer of administrative value. Contact the Records Center for historical value	All media types		<input checked="" type="checkbox"/> (for images of historical value)
23-49	Incident Report – Report of personal or property damage involving a vehicle or property	Office copy – Until audited by the Auditor of State and no pending legal action. Risk and Insurance maintains for 5 years providing no pending action	All media types		<input type="checkbox"/>
23-50	Inventories – Listing of the types and location of equipment, supplies and material (ORC 306.18)	Office copy – 1 year provided audited by the Auditor of State County Auditor maintains for 3 years after audit	All media types		<input type="checkbox"/>
23-51	Job Description – Documents the classification, needed experience, education, physical requirements and duties by position title	Until superseded or no longer of administrative value	All media types		<input type="checkbox"/>
23-52	Leases – Equipment and Real Estate	Reference Contracts General RC2, Schedule #23-23	All media types		<input type="checkbox"/>
23-53	Leave Requests – Form used to request leave for sick, vacation, personal time and compensation time	Office copy – Until audited by the Auditor of State and no discrepancies	All media types		<input type="checkbox"/>

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		County Auditor's office maintains for 4 years after audited			
23-54	Legal Advertisements and Notices – Legal announcements to inform the public of meetings, hearings, bids, auctions or other events	1 year and no longer of administrative value	All media types		<input type="checkbox"/>
23-55	Licenses, Permits and Certificates – Documents affirming requirements being met as prescribed by an issuing agency	1 year after expiration and no longer of administrative value	All media types		<input type="checkbox"/>
23-56	Mail –	Refer to Correspondence schedules	All media types		<input type="checkbox"/>
23-57	Mailing List – List of individuals with contact information for mail distribution	Until updated, superseded or obsolete	All media types		<input type="checkbox"/>
23-58	Management, Operations and Statistical Reports – Reports, feasibility studies, statistical analysis created to assess functions, projects, production and programs	Until incorporated into annual report or 5 years	All media types		<input type="checkbox"/>
23-59	Manuals and Handbooks – Documents related to activities and operations of a department, office or agency. May include rules regarding behavior, policies, procedures, processes, guidelines and instructions for operating equipment	Until updated, superseded or obsolete Review for historical value	All media types		<input type="checkbox"/>
23-60	Material Safety Data Sheets (MSDS Sheets) - Information about properties of chemicals including physical data, toxicity, first aid, storage and disposal processes	30 years per OSHA 29 CFR 1910.1020(d)(1)(ii)(B)	All media types		<input type="checkbox"/>
23-61	Meeting Audio and Video Recordings - 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 or tape reused 30 days after approval of the official record. Must have no pending discrepancies or legal action	All media types		<input type="checkbox"/>
23-62	Meeting Transcription and Notes – Non verbatim summary of the actions taken at a meeting. Used to construct the official summary or meeting minutes	Retain until minutes approved by vote in an open meeting	All media types		<input type="checkbox"/>
23-63	Minutes of Administrative Meetings – Meetings of administrative staff, management	Retain until project, goal or actions			<input type="checkbox"/>

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	teams, committees or working Includes both departmental and inter- departmental meetings	completed + 3 years Must have no pending discrepancies or legal action			
23-64	Minutes of Meetings or Hearings of Appointed Bodies and Commissions - Official minutes of proceedings, discussion, decisions, votes, resolutions or other official actions of appointed boards and commissions during public or executive session meetings	Permanent Copy maintained by the group's designated recorder until minutes approved and signed Must have no pending discrepancies or legal action			<input checked="" type="checkbox"/>
23-65	Payroll Records – Copies including but not limited to time sheets, overtime documents, attendance records and timecards	Office copy – 1 year provided audited by the Auditor of State County Auditor maintains as permanent			<input type="checkbox"/>
23-66	Personnel Files (Employee Files) – Documentation of service throughout the duration of an individual's employment. File contains employment application, personnel action forms, performance evaluations, disciplinary or grievance documentation, documentation of training received or other documentation relating to the person's employment history and performance	If using HR - Check with HR to combine more than one file and add or remove duplicate copies before scanned and sent to microfilm HR maintains the file as permanent If not using HR - Hard copy must be maintained until file scanned and sent to microfilm	All media types		<input type="checkbox"/>
23-67	Personnel Files (Medical Employee Files) – Records pertaining to employee's medical insurance and condition as it relates to their employment. Includes confidential medical information and Family Medical Leave Act (FMLA) information	If using HR - Check with HR to combine more than one file and add or remove duplicate	All media types		<input type="checkbox"/>

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		<p>copies before scanned and sent to microfilm</p> <p>HR maintains the file as permanent</p> <p>If not using HR - Hard copy must be maintained until file scanned and sent to microfilm</p>			
23-68	Press and News Releases – Information disseminated to the public through media outlets	<p>Until no longer of administrative value</p> <p>Review for historical value</p>	All media types		<input checked="" type="checkbox"/>
23-69	Professional Association Records and Related Material – Documents from associations related to an employee's job functions that enhance job performance and knowledge, inform of events and provide general information about the association	Until no longer of administrative value	All media types		<input type="checkbox"/>
23-70	Publications – Created by the local government. Brochures and promotional material created by county agencies to inform the public of services events and functions	<p>Until no longer of administrative value</p> <p>Review for historical value</p>	All media types		<input checked="" type="checkbox"/>
23-71	Record Requests – Public requests to inspect, review and obtain a copy of a public record(s). ORC 149.43	<p>1 year if no disputes and no pending legal action</p> <p>Logs of public records requests kept until audited by the Auditor of State</p>	All media types		<input type="checkbox"/>
23-72	Record Requests - Requests from one county department to another	Until no longer of administrative value	All media types		<input type="checkbox"/>
23-73	Receiving Documents - Documents received when supplies or equipment are delivered. Paperwork states what has been delivered, backorder items and delivered items	<p>Until no longer of administrative value</p> <p>No RC3 required</p>	All media types		<input type="checkbox"/>
23-74	Records Retention and Disposition Forms - Also referred to as RC1, RC2 and RC3. Forms developed by the Ohio History Connection that document the retention and disposition of the records maintained by an office, department or agency	<p>Office copy – RC1 and RC3 until audited by the Auditor of State</p> <p>RC2 until superseded</p>	All media types		<input type="checkbox"/>

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		Records Center maintains all forms as permanent			
23-75	Resolution – A written motion adopted by a government board, department or agency	Office copy – Until no longer of administrative value. If issued by the County Commissioner's maintained permanently in the Commissioner's Journal	All media types		<input type="checkbox"/>
23-76	Social Networking Records - Information posted or received that is considered to be an original record. Social media is not a records series. It is an electronic means of communicating with the public	Retain according to content Follow the retention period of the appropriate record series	All media types		<input type="checkbox"/>
23-77	Surveillance Tapes and Videos – Footage documenting daily actions of employees and visitors within a county building and its grounds	30 days then reuse provided no action pending	All media types		<input type="checkbox"/>
23-78	Time Cards and Time Sheets	Office copy – Reference Payroll records. General RC2, Schedule 23-65			
23-79	Training/Travel Requests/Records – A travel request form is a county generated form that requests permission to travel for professional purposes. May state date(s) of travel, expenses and overview of the trip, training, conference or meeting. An expense report may be a part of the request	Until audited by the Auditor of State	All media types		<input type="checkbox"/>
23-80	Uniform Records – Records tracking the management of uniforms. Only record is an invoice which lists who receives uniforms and cost to be paid	Office copy - Reference Invoices paid. General RC2, Schedule #23-42	All media types		<input type="checkbox"/>
23-81	Union Contracts and Agreements – Original and all related documents to be held by individual departments, offices and agencies. Copies maintained in Human Resources	Until the contract/agreement is superseded	All media types		<input type="checkbox"/>
23-82	Vehicle Records - Maintenance, mileage and any related documentation regarding the vehicle	Until vehicle sold or disposed Information maintained in Manager Plus	All media types		<input type="checkbox"/>

Permanent records existing solely in electronic format may become inaccessible through media decay and/or hardware/software obsolescence. The Ohio History Connection recommends that digital imaged records of permanent or greater than 10 year retention periods be maintained in either paper or microfilm formats in addition to digital formats.

All audits and audit discrepancies regarding the record titles listed above must be settled before the records may be disposed of.

The retention periods specified are either required by statute or have been determined by acceptable and best practice. Where a lawsuit or agency proceeding is pending, a legal hold on the records is required. Records that may have a bearing on the proceeding should be retained until the legal hold has been removed.

ELECTRONIC MAIL (e-mail) is a format on which records are sent, received and/or drafted using an electronic mailing system. E-mail 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 the Delaware County General Schedule.

The departmental retention schedule should be referenced and used first. If a record series is not listed on the departmental schedule then the General Schedule can be utilized.