




RECORDS RETENTION SCHEDULE (RC-2)– Part 1

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

Section A: Local Government Unit

Chardon Local School District

(Local Government Entity)	(Unit)		
	Ashley Brudno	Treasurer	02/07/2018
(Signature of Responsible Official)	(Name)	(Title)	(Date)


Section B: Records Commission

Records Commission		440-285-4052	
		(Telephone Number)	
428 North Street	Chardon	44024	Geauga
(Address)	(City)	(Zip Code)	(County)

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

ashley.brudno@chardonschools.org

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.

	02/07/2018
Records Commission Chair Signature	Date

Section C: Ohio History Connection - State Archives

Signature	Title	Date

Section D: Auditor of State

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

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*

(Local Government Entity)

(Unit)

(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
1101	Minutes	Permanent	Paper, electronic		<input type="checkbox"/>
1102	Board Meeting Agendas	1 calendar year	electronic		<input type="checkbox"/>
1103	Blue Prints, Building Plans	Permanent	Paper		<input type="checkbox"/>
1104	Deeds, Easements	Permanent	Paper		<input type="checkbox"/>
1105	Strategic Plan	10 years after superseded	Paper, electronic		<input type="checkbox"/>
1106	Board Policies	1 year after superseded	electronic		<input type="checkbox"/>
1107	Administrative Regulations	1 year after superseded	electronic		<input type="checkbox"/>
1108	Directives, Standards, Laws for Local, State and Federal Governmental Agencies	Until Superseded	Paper, electronic		<input type="checkbox"/>
1109	Court Decisions	Permanent	Paper, electronic		<input type="checkbox"/>
1110	Litigation and Claims records	Permanent	Paper, electronic		<input type="checkbox"/>
1111	Civil Rights Reports	Permanent	Paper, electronic		<input type="checkbox"/>
1112	Title IX Reports	10 years	Paper, electronic		<input type="checkbox"/>
1113	Levy and Election Records	10 years	Paper, electronic		<input type="checkbox"/>
1201	Adopted Courses of Study	Until Superseded	Paper, electronic		<input type="checkbox"/>
1202	Adopted Special Education Programs	Until Superseded	Paper, electronic		<input type="checkbox"/>
1203	Adopted Special Programs	Until Superseded	Paper, electronic		<input type="checkbox"/>
1204	School Calendars	5 years	Paper, electronic		<input type="checkbox"/>
1205	Enrollment Record (By grade and building)	Permanent	Paper, electronic		<input type="checkbox"/>
1301	Record Disposal forms (RC-3)	10 years	Paper, electronic		<input type="checkbox"/>
1302	Records Retention Schedules (RC-2)	Until superseded	Paper, electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

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1303	Public Records Request log	5 years	Paper, electronic		<input type="checkbox"/>
1401	Bargaining Agreements	10 years after expiration	Paper, electronic		<input type="checkbox"/>
1402	Employee Handbooks	Until Superseded	Paper, electronic		<input type="checkbox"/>
1403	Job Descriptions	Until superseded	Paper, electronic		<input type="checkbox"/>
1404	Personnel Directory	Until Superseded	Paper, electronic		<input type="checkbox"/>
2101	Student Record File - Enrollment/Withdrawal Information Grades/Transcripts Activities Record Attendance Records Individual Test Results Standardized Competency/Proficiency Aptitude/Foreign Exchange Records Suspension/Expulsions Home Schooled Student Records/Office Record Cards	Permanent	Paper, electronic		<input type="checkbox"/>
2102	Special Education Student Records (IEP's, ETR's, Prior Written Notices, Meeting Invitations, Progress Reports, Outside Provider Reports, tutoring reports)	7 years following student graduation and parent notification and no outstanding request to inspect and review	Paper, electronic		<input type="checkbox"/>
2103	Special Education Testing Protocols	Until superseded following parent notification and no outstanding request to inspect and review	Paper, electronic		<input type="checkbox"/>

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2104	Health/Medical Records Visual Screening Hearing Screening Immunization Records	7 Years After Graduation	Paper, electronic		<input type="checkbox"/>
2105	Student Accident Reports	5 years after graduation provided no action pending	Paper, electronic		<input type="checkbox"/>
2106	Emergency Contact Information	Until Superseded	Paper, electronic		<input type="checkbox"/>
2107	Court Orders on guardianship r parental rights/responsibilities	Until Superseded	Paper, electronic		<input type="checkbox"/>
2108	Discipline Records (including Suspension/Expulsion Letters, Office Referrals)	1 Year after Student Graduates	Paper, electronic		<input type="checkbox"/>
2109	Child Abuse/Neglect Referral Letters	7 Years After Graduation	Paper, electronic		<input type="checkbox"/>
2110	Teacher Grade Books/Records	3 Years	Paper, electronic		<input type="checkbox"/>
2111	Pre-School Screening Profiles	3 Years	Paper, electronic		<input type="checkbox"/>
2112	Age and Schooling Records (Work Permits)	3 Years	Paper, electronic		<input type="checkbox"/>
3101	Student Activity Records, (budget requests, goals and purpose statements, Ticket sale reports, sales potential forms - "Form A" and "Form B")	4 years provided audited	Paper, electronic		<input type="checkbox"/>
3102	Textbook Inventories	Until Superseded	Paper, electronic		<input type="checkbox"/>
3103	Supplies Inventory	Until Superseded	Paper, electronic		<input type="checkbox"/>
3104	Student Handbooks	Until Superseded	Paper, electronic		<input type="checkbox"/>
3105	Tornado and Fire Drill Records	1 year	Paper, electronic		<input type="checkbox"/>

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3106	Building Health Inspections	2 years	Paper, electronic		<input type="checkbox"/>
4101	Environmental Reports and Data (asbestos, etc.)	4 years	Paper, electronic		<input type="checkbox"/>
4102	Vandalism Reports	4 years	Paper, electronic		<input type="checkbox"/>
4103	Security camera footage	30 days, provided no claims pending	Paper, electronic		<input type="checkbox"/>
4104	Repair, Installation and Maintenance Records	4 years	Paper, electronic		<input type="checkbox"/>
4105	Building, Boiler, Maintenance Reports	2 years	Paper, electronic		<input type="checkbox"/>
4106	Building Use Forms	4 years	Paper, electronic		<input type="checkbox"/>
4107	Maintenance/Custodial/Technology Work Orders	4 years	Paper, electronic		<input type="checkbox"/>
4108	Employee accident reports	5 years, provided no claims pending	Paper, electronic		<input type="checkbox"/>
4109	Bids and Specifications (Unsuccessful)	1 year after completion of project, provided audited	Paper, electronic		<input type="checkbox"/>
4110	Bids and Specifications (Successful)	4 years after completion of project, provided audited	Paper, electronic		<input type="checkbox"/>
4111	Prevailing Wage Records	4 years provided audited	Paper, electronic		<input type="checkbox"/>
4112	Contractor Files (proposals, additions, drawings, etc.)	Until Project Complete, provided no action pending and provided audited	Paper, electronic		<input type="checkbox"/>

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4113	Plant and Equipment Inventory	Until Superseded, provided audited	Paper, electronic		<input type="checkbox"/>
4114	Warranty/Guarantee	Until equipment disposed of	Paper, electronic		<input type="checkbox"/>
4115	Leases (property, building, equipment)	5 years after expiration of lease, provided audited	Paper, electronic		<input type="checkbox"/>
4201	Driver Physical	2 years after termination	Paper, electronic		<input type="checkbox"/>
4202	Driver Certifications	2 years after termination	Paper, electronic		<input type="checkbox"/>
4203	Fuel Consumption Reports	4 years	Paper, electronic		<input type="checkbox"/>
4204	Extra trip records	4 years	Paper, electronic		<input type="checkbox"/>
4205	Transportation Field Trip Forms and Volunteer Driver forms	Fiscal year Plus 2 years	Paper, electronic		<input type="checkbox"/>
4206	Vehicle Maintenance Reports (including preventative maintenance)	Fiscal year Plus 2 years	Paper, electronic		<input type="checkbox"/>
4207	Vehicle Registration	Until vehicle disposed of	Paper, electronic		<input type="checkbox"/>
4208	Vehicle Defect Report	Until vehicle disposed of	Paper, electronic		<input type="checkbox"/>
4301	Food Service Records - Menus, Food Production, Milk Sold, Students Served	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
4302	Lunchroom Records Cash Register Tapes, Cashier's Daily Reports	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
4303	Lunchroom Reports (Free and reduced)	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
4304	Free/Reduced Price Lunch Application	4 years	Paper, electronic		<input type="checkbox"/>
4305	Lunchroom License	1 year after expiration	Paper, electronic		<input type="checkbox"/>

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5101	Annual Financial Reports - Appropriation/Budget reports, revenue reports, Vendor Listing, Check Register, Purchase Order Listing, Financial Summary, Detail Reports, Fund balance reports	5 years, provided audited	Paper, electronic		<input type="checkbox"/>
5102	Financial Audit (released by Auditor of State) including financial statements, notes, opinion letters, and Federal Schedule	10 years, provided audited	Paper, electronic		<input type="checkbox"/>
5103	Five Year Forecasts	5 years	Paper, electronic		<input type="checkbox"/>
5104	Bank Depository Agreements	4 years after completion	Paper, electronic		<input type="checkbox"/>
5105	Bank Statements	10 years, provided audited	Paper, electronic		<input type="checkbox"/>
5106	Investment Records (investment ledger, confirmations, wire transfers, copy of cd, etc.)	5 years, provided audited	Paper, electronic		<input type="checkbox"/>
5107	Bond Register	20 years after issue expires	Paper, electronic		<input type="checkbox"/>
5108	Bonds and Coupons	Until Redeemed, provided audited	Paper, electronic		<input type="checkbox"/>
5109	Securities	Permanent	Paper, electronic		<input type="checkbox"/>
5110	Tax Anticipation Notes (Records borrowing against Future tax Collections)	10 years, provided audited	Paper, electronic		<input type="checkbox"/>
5111	Tax Budget Files (Alternative Tax Budget File and Resolution)	10 years, provided audited	Paper, electronic		<input type="checkbox"/>
5112	Certificate of Estimated Resources	10 years, provided audited	Paper, electronic		<input type="checkbox"/>
5113	Original Appropriations, Appropriations Amendments, and Final Appropriations	10 years, provided audited	Paper, electronic		<input type="checkbox"/>

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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
5114	Insurance Policies	15 years after Expiration Provided all Claims settled	Paper, electronic		<input type="checkbox"/>
5115	Employee Bonds, Board Member Bonds	5 years after expiration	Paper, electronic		<input type="checkbox"/>
5116	Vendor Contracts	15 years after expiration	Paper, electronic		<input type="checkbox"/>
5117	Voucher Packages (check copy, PO, invoice, expenditure support)	10 years, provided audited	Paper, electronic		<input type="checkbox"/>
5118	Receipts (includes copy of receipt, deposit slip, pay-in form, check copy, receipt support: tuition report, state foundation report, tax settlement sheet, auxiliary services report, grant report, etc.)	10 years, provided audited	Paper, electronic		<input type="checkbox"/>
5201	Personnel files (including employment applications, resumes, contracts/salary notices, evaluations, personnel actions, absence certifications, tax forms, retirement enrollment, payroll deduction authorizations, transcripts, Civil Rights/Civil Services records, disciplinary records, retirement letters, and any other documents which become part of the personnel file)	Permanent	Paper, electronic		<input type="checkbox"/>
5202	Application materials for individuals not hired (employment application, resume, references, recommendation letters, background check, etc.) (NOTE: application materials for anyone hired will go in personnel file which is permanent.)	2 years after the position for which they applied is filled	Paper, electronic		<input type="checkbox"/>
5203	Payroll Ledgers Bi-weekly payroll reports, quarterly payroll reports	Permanent	Paper, electronic		<input type="checkbox"/>

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5204	Monthly Payroll Reports Leave usage and Accumulation Retirement service, etc.	Permanent	Paper, electronic		<input type="checkbox"/>
5205	Bureau of Employment Service Quarterly Reports	6 years, provided audited	Paper, electronic		<input type="checkbox"/>
5206	W-2's, W-4's (employer copy)	6 years, provided audited	Paper, electronic		<input type="checkbox"/>
5207	Federal Income Tax (quarterly/annual)	6 years, provided audited	Paper, electronic		<input type="checkbox"/>
5208	Ohio Income Tax (monthly/annual)	6 years, provided audited	Paper, electronic		<input type="checkbox"/>
5209	City Income Tax (monthly/annual)	6 years, provided audited	Paper, electronic		<input type="checkbox"/>
5210	School Income Tax (monthly/annual)	6 years, provided audited	Paper, electronic		<input type="checkbox"/>
5211	Payroll Reports used for each payroll computer generated	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5212	Payroll Update Listing	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5213	Payroll Calculations	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5214	State Employees Retirement System (SERS) Reports	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5215	State Teachers Retirement System (STRS) Reports	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5216	Annuity Reports	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5217	Benefit Folders/Reports	4 years, provided audited	Paper, electronic		<input type="checkbox"/>

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5218	Employee Request and/or authorization for leave forms (sick, vacation, personal, or other leave)	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5219	Employee Vacation/Sick Leave Records	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5220	Time Sheets (includes Overtime authorization)	6 years, provided audited	Paper, electronic		<input type="checkbox"/>
5221	Employee Insurance Bills Medical Dental Life	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5222	Paycheck register	4 years, provided audited	Paper, electronic		<input type="checkbox"/>
5223	Unemployment Claims and reports	5 years	Paper, electronic		<input type="checkbox"/>
5224	Worker's Compensation Claim records	10 years after financial payment made	Paper, electronic		<input type="checkbox"/>
9999	Transient documents - Notes, drafts, correspondence, invitations, meeting agendas (other than Board meeting agendas)	Until no longer of administrative value	Paper, electronic		<input type="checkbox"/>