



PUBLIC RECORDS POLICY HANDBOOK
UNION TOWNSHIP, OHIO
(Clermont County)

The Eastern Gateway of the Cincinnati Metropolitan Area

www.utclermont.gov

(MAY 2025)

UNION TOWNSHIP BOARD OF TRUSTEES

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PUBLIC RECORDS POLICY
UNION TOWNSHIP, CLERMONT COUNTY, OHIO

(ADOPTED SEPTEMBER, 2007)
(TITLE PAGE AMENDED 2022)
(APPENDIX AMENDED 2024)
(POLICY AMENDED 2025)

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Open Records Mission Statement

Consistent with the premise that government at all levels exists first and foremost to serve the interests of the people, it is our mission and intent to at all times fully comply with and abide by both the spirit and the letter of Ohio's Public Records Act and Open Meetings Act.

In order to accomplish the mission of fully complying with both the letter and spirit of the Public Records and Open Meetings Acts, Union Township hereby incorporates the following Statement of Principles as the foundation for its Public Record Policy Handbook:

Statement of Principles

Union Township: Will enact a formal resolution memorializing the Mission Statement;

Will ensure that appropriate personnel become and remain fully trained in and aware of the provisions of the acts;

Will do nothing that abridges the public's right to obtain information about their government or that inhibits or discourages citizens from doing so;

Will do everything possible to aid those who are seeking information, including but not limited to, fully explaining the scope and operation of the acts and assisting citizens in the formulation of requests;

Will construe the provisions of the acts in a manner that favors compliance with requests for information;

Will seek guidance from the legal counsel whenever a question arises about the application of the acts or about the appropriateness of a request for information;

Will clearly and concisely state the reason or reasons why a request for information has been denied.

Introduction

It is the policy of the Union Township Board of Trustees that openness leads to a better-informed citizenry, which leads to better government and better public policy. It is the policy of Union Township Board of Trustees to adhere to the state's Public Records Act. Any denial of public records in response to a valid request will be accompanied by an explanation, including legal authority, as outlined in the Ohio Revised Code. If the request is in writing, the explanation will also be in writing. Union Township reserves the right to amend this Policy Handbook from time to time, as required, to keep pace with revisions to the Ohio Public Records Law.

Article I. Definitions & General Administrative Requirements

Section 1.01 Definition of Public Record

Union Township, Clermont County, Ohio, in accordance with the Ohio Revised Code, defines the term "**PUBLIC RECORD**" as including the following: Any document – paper, electronic (including, but not limited to, e-mail), or other format – that is created or received by, or comes under the jurisdiction of a public office that documents the organization, functions, policies, decisions, procedures, operations, or other activities of Union Township agencies. All records of Union Township are public unless they are otherwise specifically exempt from disclosure, as enumerated within the Ohio Revised Code.

Section 1.02 Records Retention & Organization

It is the policy of Union Township that all records subject to disclosure, including email, as required by Ohio law, will be organized and maintained so that they are readily available for inspection and copying. Record retention schedules are to be updated regularly and shall be posted within the administrative offices of all Union Township agencies.

Section 1.03 Records Custodian Designation

Upon the adoption and effective date of this Policy, the Union Township Fiscal Officer shall be the designated "Records Custodian" for Union Township, Clermont County, Ohio.

Notwithstanding this designation, each Township Department shall remain responsible for fielding, coordinating, and/or managing responses to requests for public records, under the direction of the Township Fiscal Officer in his/her official capacity as the Records Custodian for Union Township, Clermont County, Ohio.

Article II. Processing Requests for Public Records

Each request for public records should be evaluated for a response using the following guidelines established within this section of the *Union Township Public Records Policy Handbook*. All requests shall be forwarded to the Union Township Fiscal Officer, or shall be otherwise documented and maintained by the agency within the Township responsible for fulfillment of the request.

Section 2.01 Identification of Public Records Requested

Although no specific language is required to make a request, the requester must at least identify the records requested with sufficient clarity to allow the designated employee(s) or agents of Union Township to identify, retrieve, and review the records. If it is not clear what records are being sought, the Township will contact the requester for clarification, and will assist the requestor in revising the request by informing the requestor of the manner in which the Township keeps its records.

Section 2.02 Transmittal of Request to Agency – No Identification Required

The requester shall not be required to put a records request in writing, and shall not be required to provide his or her identity or the intended use of the requested public record. However, in certain instances, individuals requesting public records may voluntarily provide his/her identity and/or contact information in order to assist Union Township staff in complying with the public records request.

Section 2.03 Inspection & Processing of Records Request

Public records shall be made available for inspection during regular business hours at the offices of Union Township, with the exception of published holidays. Public records shall be made available for inspection promptly. Copies of public records will be made available within a reasonable period of time. “Prompt” and “reasonable” take into account the volume of records requested; the proximity of the location where the records are stored; and the necessity for any legal review of the records requested.

Section 2.04 Responding to Public Records Requests

Each request for public records will be evaluated for an estimated length of time required to gather the records requested. Routine requests for records will be satisfied immediately, if feasible. Routine requests include, but are not limited to, meeting minutes, budgets, salary information, forms and applications, personnel rosters, etc. If fewer than 20 pages of copies are requested or if the records are readily available in an electronic format that can be readily e-

mailed, electronically copied, or downloaded easily by the requester, the aforementioned files, copies, or data will be made as quickly as Township technology allows.

All requests for public records to Union Township will be satisfied or be acknowledged in writing by the Township within three (3) business days following the receipt of the request. If the Township will charge for production of the responsive records, the estimated cost of the production shall be provided to the requester in the acknowledgment. For any request that is not denied, the Township will produce responsive records within a reasonable period of time.

Section 2.05 Denial or Redaction of Public Records

Any denial of public records requested will include an explanation, including legal authority for such denial. If portions of a record are public and portions are exempt as established within the Ohio Revised Code, the exempt portions will be redacted and the remainder of the document released to the requesting party. If there are redactions (which serve as a denial of that portion of a request), the Township shall clearly mark the redaction and provide the reason and legal authority for the redaction. In every instance, Union Township staff shall seek an opinion from the Union Township Law Director prior to finalizing any redaction to any requested records, or prior to denying a request for public records.

Article III. Transmittal & Recovery of Costs

Section 3.01 Costs for Public Records – General Procedures

Those seeking public records will be charged only the actual cost of making copies incurred by Union Township in the process of fulfilling a specific public records request. An invoice outlining the actual costs incurred for each item shall be prepared for the requester. Union Township staff shall issue a receipt of payment for the requested public records to the requester. Requested records will not be released until such time that payment is received for such request in full from the requester.

Section 3.02 Paper Copies

- ❖ The charge for 8.5"x 11" paper copies shall be \$0.10 per page
- ❖ The charge for 8.5"x 14" paper copies shall be \$0.10 per page
- ❖ The charge for 11"x 17" paper copies shall be \$0.15 per page
- ❖ The charge for oversize plans, prints, or other documents shall be \$5.00 per sheet
- ❖ The charge for outsourced plans, prints or other documents shall be the actual costs incurred by the Township as invoiced by the designated third-party vendor

Section 3.03 Electronic Copies, Audio Recordings, & Digital Media

- ❖ The charge for downloaded computer files to a compact disc shall be \$2.00 per disc
- ❖ The charge for DVD recordings of public meetings shall be \$5.00 per disc
- ❖ The charge for audio cassette recordings of public meetings shall be \$2.00 per cassette tape
- ❖ The charges for video records requested from the Union Township Police Department shall be as set forth within Section 3.04 of this Policy

Section 3.04 Law Enforcement Video Records: Fees and Processing

Union Township, in conjunction with its Police Department, records and maintains law enforcement video records in the administration and furtherance of legitimate law enforcement activities within the Township. This includes, but is not limited to, body worn camera footage, cruiser dash camera footage, mobile or stationary video surveillance footage, or other similar video footage that is recorded and maintained by the Township and its Police Department.

Consistent with the Public Records Act and notwithstanding other provisions of the Ohio Revised Code, the Township shall charge an individual or entity that requests law enforcement video records for the actual cost associated with the Township's preparation of a law enforcement video record for inspection or production. The actual cost to the Township of preparing each law enforcement video record for inspection or production, which includes reviewing, blurring or otherwise obscuring, redacting, uploading, and producing the law enforcement video records, and also includes the storage medium on which the record is produced, Township staff time, and other relevant overhead costs necessary to comply with the request, is \$55.00 per hour. This actual cost to the Township shall be assessed to the requester for the time taken to prepare each law enforcement video record for inspection or production, not to exceed \$750.00 in total.

When the Township receives a request for law enforcement video records, the Township's Police Department shall provide the requester with the estimated actual costs of fulfilling the request for law enforcement video records, in writing, within five (5) business days of receipt of the public-records request. The written response that includes the estimated actual costs may be sent either via email or regular mail, depending upon the manner in which the original request was received. If the original request was not received in writing either via email or written letter with a return address specified, the Township's Police Department shall utilize the method of contact utilized by the requester to advise them of the estimated actual cost (e.g. phone, text, in-person, etc.) only after making reasonable attempts to obtain a suitable and preferred method to transmit the estimated costs in writing, as specified by the requester.

The Township's Police Department shall require the requester pay the estimated actual cost before beginning the process of preparing a video record for inspection or production. The Township's Police Department's obligation to prepare a law enforcement video record for inspection or production shall commence only after the estimated actual cost is paid in full by the requester. The requester may make payment of the estimated actual cost by check, cash, credit card (in person), or money order.

In the event that the actual cost to prepare the requested law enforcement video records for inspection or production exceeds the estimated cost provided to the requester by the Township's Police Department, the Township's Police Department shall charge the requestor for the difference between the estimated cost and actual costs upon fulfilling the request for video records, subject to the following conditions:

1. The Township's Police Department advised the requester, in writing, that the actual costs exceed the estimated costs prior to (in advance of) fulfillment; and,
2. When the actual costs exceed the estimated costs, the actual cost charged to the requester shall not exceed twenty (20%) percent more than the estimated cost, as provided to the requester.

The Township's Police Department shall not charge the actual cost for the preparation of law enforcement video records for inspection or production for law enforcement video records requested by the following individuals, persons, or entities:

1. The victim, or potential victim, of a crime where a police report has been filed;
2. The immediate family members of the victim, or potential victim, of a crime requesting video on behalf of said victim, where a police report has been filed;
3. A parent or legal guardian of a juvenile minor victim, or potential victim, of a crime where a police report has been filed;
4. An attorney representing a victim, or potential victim of a crime, where documentation is provided evidencing an established attorney-client relationship and where a police report has been filed;
5. A person having durable or limited Power of Attorney (POA) on behalf of a victim, or potential victim, of a crime, provided that a police report has been filed and provided that proper documentation can be furnished evidencing the same;
6. A person requesting the video record on behalf of any state, federal, or local government agency or any state, federal, or local law enforcement agency, for any lawful government purpose, including the administration of any lawful administrative or law enforcement activities;
7. A person requesting the video record on behalf of any public school or any private school or institution recognized, operating, and licensed as such in the State of Ohio.

The Township's Police Department shall be authorized to seek communications, documentation, or other records from requesting parties in the event that an actual-cost exemption is sought, evidencing that a requester is eligible for an exemption from law enforcement video record costs, as detailed herein.

Section 3.05 Electronic Transmittal of Documents

There shall be no charge for documents e-mailed to the requester or for files transferred to a requester via "FTP" site (file transfer protocol). If a requestor requests documents in electronic format, the files shall be provided in that manner.

Section 3.06 Transmittal via Regular Mail or Courier Service

Requesters may ask that documents be mailed to them or delivered to them via courier service. Requesters shall be charged the actual cost of the postage and mailing supplies, or the actual cost of effecting delivery via the designated courier service.

Article IV. Electronic Message (EMAIL) Records

Documents in electronic mail format may be public records as defined by the Ohio Revised Code when their content relates to the business of the office. Email is to be treated in the same fashion as records in other formats and should follow the same retention schedules as other public records.

Section 4.01 Email Records – General Provisions

Records in private email accounts used to conduct public business are subject to disclosure, and all employees or representatives of this office are instructed to retain their emails that relate to public business in accordance with Article I of this document. Records in private email accounts shall be periodically copied to their business email accounts and/or to designated email archives as determined by the designated records custodian.

Section 4.02 Retention of Email Records

The records custodian of each Union Township agency shall treat the emails referenced in Section 4.01 of this Article as records of the public office, filing them in the appropriate way, retaining them per established schedules and making them available for inspection and copying in accordance with the Public Records Act, as amended.

Article V. Administration and Enforcement

Section 5.01 Remedies for Failure to Comply

Any employee of Union Township, including the designated Records Custodian for each Union Township agency, who willfully fails to fulfill a public records request by failing to follow the instructions of the appointed Records Custodian or who fails to observe the policies and procedures adopted within this document may be subject to disciplinary action as established within the *Personnel Policy Manual of Union Township, Clermont County, Ohio (Amended June 11, 2024)*.

Appendix

Retention Schedule

Employee Receipt Acknowledgement Form

Union Township Employee Acknowledgement Receipt of Public Records Policy Handbook

I, _____, hereby acknowledge that I have received a copy of the *Union Township Public Records Policy Handbook*, and understand the provisions set forth therein. Further, I understand the consequences of failure to follow the provisions set forth within this document, including being subject to disciplinary procedures set forth within the *Personnel Policy Manual of Union Township, Clermont County, Ohio (Amended June 11, 2024)*.

Signature

Date

Print Name

Department/Agency



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

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JULY 22 2025

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: Local Government Unit

Union Township, Clermont County, Ohio

(Local Government Entity)	(Unit/Department)		
Michael Logue		Chairman, Records Commission	07/21/2025
(Signature of Responsible Official)	(Name)	(Title)	(Date)

Section B: Records Commission

Union Township, Clermont County, Ohio Records Commission	(513) 752-1741		
(Telephone Number)			
4350 Aicholtz Road	Cincinnati, Ohio	45245	Clermont County, Ohio
(Address)	(City)	(Zip Code)	(County)

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

cwright@utclermont.gov

I hereby certify that our records commission met in an open meeting, as required by the Ohio Revised Code, §121.22, 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.


Records Commission Chair Signature

07/21/2025

Date

Section C: Ohio History Connection - State Archives

Local Government Records Archivist		7/22/2025
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 retains a permanent copy of this form

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

See instructions before completing this form.

Union Township, Clermont County, Ohio

(Local Government Entity)

(Unit/Department)

Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
AD-101	ACCIDENT REPORTS		2 fiscal years, provided audited.		
AD-102	ACCOUNT RECORDS	Arranged chronologically by date of entry. Contains date, name, purpose or source, number of warrant or voucher number, receipts and expenditures, and balance from various accounts. Although series loses administrative value rapidly, expiring by the time 10 years have elapsed, and loses fiscal value once audited, some Account Records have included Minutes and Results of Elections.	10 years after last entry, provided audited.	ORC-507.04	
AD-103	AGENDAS		2 years.		
AD-104	AMENDED OFFICIAL CERTIFICATES OF ESTIMATED RESOURCES	From County Auditor of Township for yearly budget.	5 years.		
AD-105	ANNUAL BUDGET RESOLUTIONS	July document and December amendments.	Incorporate into Minutes; retain copies 5 years.		
AD-106	ANNUAL FINANCIAL REPORTS	Proceedings.	Incorporate into Minutes.	ORC 507.07	
AD-107	ANNUAL FINANCIAL REPORTS TO AUDITOR OF STATE		25 years.		
AD-108	ANNUAL INVENTORIES	Annual inventory of Township equipment and supplies.	3 fiscal years, provided audited.	ORC-505.04	
AD-109	ANNUAL REPORTS - CLERK		Permanent.	ORC-5571.13	RC-3 REQUIRED
AD-110	APPLICATIONS FOR EMPLOYMENT		Retain with Personnel Record if applicant employed; destroy others after 2 years		
AD-111	APPROPRIATIONS LEDGERS	Receipts and Expenditures Records. Contains who the funds are for, for what purpose, when available, year available, amount, and source of funds.	5 fiscal years, provided audited.		
AD-112	AUDIT REPORTS		5 fiscal years.		
AD-113	BANK DEPOSIT SLIPS		4 fiscal years, provided audited.		
AD-114	BANK STATEMENTS	Reconciliations.	4 fiscal years, provided audited.		
AD-115	BIDS (Successful)	Contains bidder information, dates, cost of materials, labor, expected completion date, services to be provided, and penalties for non-completion.	3 fiscal years, provided audited.		
AD-116	BIDS (Unsuccessful)	See above.	3 fiscal years, provided audited.		
AD-117	BOND REGISTERS	Revenue Bonds.	20 fiscal years after issue called.		
AD-118	BONDS, OFFICIALS	(Record of Officials' Oaths and Bonds; Certificates of Oaths; Notices to Officers Elected or Appointed) Arranged by official's title and therein chronologically. Contains a record of surety bonds filed by Township officials, showing office holder, office, sureties, amounts and conditions of bonds, date approved, date filed, and oath.	10 years after termination of office or employee. Appraise for historical value.	ORC-503.25; ORC-507.04; ORC-507.05; ORC-507.08	
AD-119	BONDS, REVENUE	Redeemed Coupons	2 years after redemption, provided audited.		
AD-120	BUDGETARY AND FISCAL WORK SHEETS		3 fiscal years, provided audited.		
AD-121	BURIAL PERMITS	Burial Transit Permits.	5 fiscal years.		

✓

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec.117.26 ORC

AD-122	BURIAL RECORDS	Cemetery Records, Internment Records. Contains a record of burials in the township cemetery, showing name of decedent, place of birth, last residence, age at death, sex, date of death, cause of death, date of interment, lot number, location, box or vault, cost of digging, name of undertaker, address, and remarks.	Permanent.		RC-3 REQUIRED ✓
AD-123	CANCELED CHECKS		4 fiscal years, provided audited.		
AD-124	CASH BOOKS	Cash Receipts and Expenditures Journals	3 years, provided audited.		
AD-125	CEMETERY ACCOUNT RECORDS	(Investments of Cemetery Funds) funds for the care of the cemetery, including record of investments and receipts and disbursements.	10 years after last entry, provided audited.	ORC-507.04 ORC-517.17	
AD-126	CEMETERY DEED RECORDS/CEMETERY LOT SALES RECORDS	Includes lot number, section, parties, amount, lot description, witnesses, dates, cemetery blueprints, deeds to Township property, and mausoleum descriptions.	Permanent.	ORC-517.07	RC-3 REQUIRED ✓
AD-127	CEMETERY PLATS	Contains plat of Township cemetery, showing roads and pathways, with lots separately defined and numbered consecutively.	Permanent.	ORC-517.06	RC-3 REQUIRED ✓
AD-128	CERTIFICATES OF TOTAL AMOUNT FROM SOURCES AVAILABLE FOR EXPENDITURES AND BALANCES	Shows beginning balance and monies expected for the year.	3 years, provided audited.		
AD-129	CERTIFICATIONS OF PUBLISHING LEGAL NOTICES	Shows when published, who published, for what reason, length of run, and charge.	2 years.		
AD-130	CHECK REGISTERS	Stubs, duplicate copies of checks.	4 fiscal years, provided audited.		
AD-131	CONSTRUCTION FILES	Arrange chronologically. Contains records relating to building or road constructions, improvements, bids, specifications, inventories, and contracts.	15 years after construction is complete.		
AD-132	CONTRACTS AND AGREEMENTS		15 fiscal years.		
AD-133	CORRESPONDENCE		2 fiscal years.		
AD-134	CRYPT RECORDS	Mausoleum records; SEE Cemetery Records. Arranged chronologically. Contains owners' names at mausoleum, mapping, and statistics.	Permanent.		RC-3 REQUIRED ✓
AD-135	E-MAIL	Electronic mail system (e-mail)	1 month, if no longer of any administrative value.		
AD-136	EMERGENCY FUND MINUTES	Arranged chronologically by date of proceeding.	Permanent.		NO RC-3 FOR LGRP
AD-137	EMPLOYEE TIME RECORDS		3 years, provided audited.		
AD-138	EMPLOYMENT RECORDS	Ohio Bureau of Employment Reports. Quarterly payroll reports.	Permanent.		
AD-139	EQUIPMENT MAINTENANCE	Equipment maintenance and repair records.	1 year after equipment sold, scrapped, or no longer the property of the township (RC-3 required for disposal).		

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec.117.26 ORC

AD-140	EQUIPMENT MISSED, DAMAGED, DESTROYED	Contains description of equipment, facts of incident, and date.	2 years.		
AD-141	FEDERAL REVENUE SHARING RECORDS		Obsolete. Destroy if no longer of any administrative value.		
AD-142	FENCE DISPUTE FORMS	Line Fence Dispute Forms. Forms filed with trustees to settle building of fences.	5 years after settlement.		
AD-143	FENCE PARTITION RECORDS	Arranged chronologically. Contains description of property, names of owners, and date.	Appraise for historical value.		NO RC-3 FOR LGRP
AD-144	FENCE PROCEEDINGS	Arranged chronologically. Contains complaints over fences, border repairs, and other minutes.	Appraise for historical value.		NO RC-3 FOR LGRP
AD-145	GAS SLIPS	Charge slips and receipts for Township vehicles. Contains date, care, amount, and cost.	1 year, provided audited.		
AD-146	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		
AD-147	GRANTS - AWARDED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		
AD-148	INCOME TAX RETURNS		6 fiscal years.		
AD-149	INSURANCE POLICIES		2 years after expiration, provided all claims are settled.		
AD-150	INVENTORIES	Lists of equipment, departmental property, dates, status, and description.	1 year, until superseded.		
AD-151	JOINT ECONOMIC DEVELOPMENT DISTRICT RECORDS (JEDD)	Records of the contracts, proceedings, and other actions taken by various Joint Economic Development Districts created throughout the Township.	5 Years after termination of JEDD Contract, provided audited.		
AD-152	LAW SUITS	(After decisions)	5 years.		
AD-153	LEASES		5 fiscal years after expiration, provided audited.		
AD-154	LEVY FILES		Life of levy, plus 1 year, or 5 years, whichever is less.		
AD-155	LIQUOR BLACKLISTS	(Notice to Liquor Dealers) Arranged chronologically. Notices to tavern owners and liquor establishments not to sell liquor to individuals.	Obsolete. Appraise for historical value.		RC-3 REQUIRED ✓
AD-156	MAINTENANCE NEEDS STUDIES	Arranged chronologically. Contains equipment type, percent expected, annual depreciation, and replacement needs.	5 years after end of fiscal year.		
AD-157	MEMORANDUMS/NOTES		Until no longer of administrative value.		
AD-158	MINUTES	Proceedings of Township Trustees. Includes proceedings, election data, bonds, settlements, accounts, and other matters pertaining to the Township's jurisdiction. 19 th century records may contain Poor Records, Marks and Brands, Estray Records, Chattel Mortgages and Deeds, and other information not listed in separate volumes or files.	Permanent.	ORC-507.04	RC-3 REQUIRED ✓
AD-159	PAY-IN-ORDERS	Receipts.	3 years, provided audited.		

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec.117.26 ORC

AD-160	PAYROLL RECORDS	Contains information about Township employees' pay, vacation, sick time, comp time, application, and personal history.	60 years.		
AD-161	Individuals' Annual Records				
AD-162	PAYROLL RECORDS	Contains all payroll information, sick days, vacation, injury, social security number and dates.	3 fiscal years, provided audited.		
AD-163	Biweekly Records.				
AD-164	PERMITS AND LICENSES		1 year after expiration, provided audited.		
AD-165	P.E.R.S. MONTHLY REPORTS	Public Employees Retirement System Reports	60 years.		
AD-166	PERSONNEL RECORDS	Contains history on current and past employees. Includes work information, memos, pay increases, and worker's compensation.	60 years.		
AD-167	PLATS AND MAPS	Contains plats of subdivisions, towns, and villages within the Township, showing owners, parcel numbers, streets, alleys, streams and rivers, and railroads.	Appraise for historical value.		RC-3 REQUIRED ✓
AD-168	POLL BOOKS AND TALLY SHEETS	Poll Books arranged alphabetically by elector, showing date of election, precinct, ward, and names and addresses of electors. Tally sheets arranged by offices, therein alphabetically by candidate, showing votes cast for each candidate, proposal, or amendment	Appraise for historical value.		RC-3 REQUIRED ✓
AD-169	POST OFFICE RECORDS AND RECEIPTS	Receipts and transaction records documenting sales activities at the Contract Post Office operated by Union Township in conjunction with the USPS.	Retain for 3 years, provided audited (RC-3 Not Required).		PERMANENT
AD-170	TOWNSHIP PUBLICATIONS		Permanent; retain 2 copies.		✓
AD-171	REAL ESTATE DATA REPRODUCED FROM COUNTY AUDITOR'S RECORDS		Permanent; updates as available.		
AD-172	RECORDS OF COMMITTEES SERVED ON		1 year.		
AD-173	REQUISITIONS	Invoices; purchase orders.	3 fiscal years, provided audited.		
AD-174	RESOLUTIONS	Copies. Contains resolution number, reason for resolution, date passed, description of action, person introducing resolution, reference to date proposed, and action by board.	Retain copies 5 years after incorporation into Minutes (Proceedings).		
AD-175	SEMI-ANNUAL APPORTIONMENT OF TAXES		5 fiscal years.		
AD-176	SICK AND VACATION LEAVE RECORDS	Contains time allowed, employee name, dates used, and total time available.	60 years. Filed with Personnel Records.		
AD-177	SPECIFICATIONS BOOKS		Incorporate 1 copy with contracts.		
AD-178	STATEMENTS OF ACCOUNT FOR PER DIEM AND SERVICES		3 fiscal years, provided audited.	ORC-505.24	
AD-179	SUBDIVISION RECORD PLANS	Lot number and street address index.	Permanent.		RC-3 REQUIRED ✓
AD-180	SURETY BONDS	SEE Bonds			

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec.117.26 ORC

AD-181	TAPE RECORDINGS OF TRUSTEES' MEETINGS		Incorporate into official Minutes; then retain 1 year.		
AD-182	TAPE RECORDINGS OF DISCIPLINE AND GRIEVANCE HEARINGS		Incorporate into Personnel Files; then retain 30 days after appeal time has elapsed.		
AD-183	TAX SETTLEMENTS	Semi-annual apportionment of taxes from County Auditor.	5 years.		
AD-184	TELEPHONE BILLS, LONG DISTANCE TELEPHONE LOGS		2 fiscal years, provided audited.		
AD-185	TELEPHONE MESSAGES	Calls received.	Until no longer of administrative value.		
AD-186	TEXT MESSAGES	Cellular Phone Text Messages or Similar Electronic Communications Sent or Received on Mobile Devices.	Delete after Seventy-Two (72) Hours.		
AD-187	TIME SHEETS	Contains data concerning time, dates, and running totals of time available.	3 years, provided audited.		
AD-188	TOTAL WAGE AND SALARIES REPORTS	Office copy. Reports sent to County Auditor.	5 years.		
AD-189	UNION CONTRACTS	States all areas of employment and agreements between workers and management.	5 years after expiration.		
AD-190	VEHICLE MAINTENANCE REPORTS	Lists vehicle, type of repair, date done, mileage of vehicle, dates of all oil changes, name of person doing repair, etc.	1 year after equipment sold, scrapped, or no longer the property of the township (RC-3 not required).		
AD-191	VOUCHERS, INVOICES AND PURCHASE ORDERS		4 fiscal years, provided audited.		
AD-192	W-2 FORMS		4 fiscal years.		
AD-193	W-4 FORMS		Until superseded or employee terminates.		
AD-194	WORK SCHEDULES	Hours of work, days off, employee assignments, dates, and station.	1 year after schedule change.		
AD-195	WORKERS COMPENSATION CLAIMS	Contains name of injured, date of injury, amount of time off, degree of injury, how accident happened, claim number, place of employment, amount of benefits, length of benefits, and decision of board.	10 years after date of final payment.		

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec.117.26 ORC

Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
PD-101	ACTIVITY SHEETS		2 years.		
PD-102	ANIMAL CONTROL RECORDS		2 years.		
PD-103	APPOINTMENT BOOKS	Hourly, daily, weekly, monthly and annual appointment books, records, calendars, schedules, organizer and planner	Until no longer of administrative value (RC-3 not required).		
PD-104	ARREST REPORTS	Contains all information on arrest, including date, time, offense, officer, name of subject, location and disposition.	Until age 80 years or deceased. Maintain paper until electronically scanned and quality control checked, prior to paper destruction.		
PD-105	BLANK FORMS		Retain until no longer of administrative value (RC-3 not required).		
PD-106	BULLETINS	Bulletins, posters, general notices and displays	Retain until no longer of administrative value (RC-3 not required).		
PD-107	BUSINESS CARDS	Business cards: rotary, Rolodex and applicable software files.	Until no longer of administrative value (RC-3 not required).		
PD-108	CHILD ABUSE CASE RECORDS		7 years after case closed. Maintain paper until electronically scanned and quality control checked, prior to paper destruction.		
PD-109	COMPLAINT REPORTS		2 years, provided no action pending.		
PD-110	COMPLAINTS	Anonymous or unfounded complaints	Until no longer of administrative or legal value (RC-3 required for disposal).		
PD-111	COPIES	Reading, informational and reference.	Retain until no longer of administrative value (RC-3 not required).		
PD-112	CORRESPONDENCE	Transient	Retain until no longer of administrative value (RC-3 not required).		
PD-113	CORRESPONDENCE	Unsolicited communications: e-mail, mail, and similar unsolicited communications.	Retain until no longer of administrative value (RC-3 required for disposal).		
PD-114	POLYGRAPH RECORDS		6 years.		
CRIMINAL CASE FILES -					
PD-115	FELONIES		20 years, provided no action pending. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction.		
CRIMINAL CASE FILES -					
PD-116	MISDEMEANORS		3 years, provided no action pending. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction.		
PD-117	DRAFTS	Informal notes, reminder notes, videos in progress, out-takes, unused footage, bloopers, etc.	Retain until no longer of administrative value (RC-3 not required).		
PD-118	ELECTRONIC MAIL	Electronic mail system (e-mail)	Print e-mail that has a significant administrative, fiscal or legal value. File paper copy according to content. Erase e-mail after 1 month, when no longer of an administrative value (RC-3 not required).		
PD-119	EMPLOYEE CONTACT INFORMATION	Lists, rosters, informational directories containing employee contact information	Continually maintained, purged and updated (RC-3 not required).		
PD-120	FACSIMILE LOGS	Facsimile logs, cover sheets, confirmation notices and buffer printouts	Until no longer of administrative value (RC-3 not required).		
PD-121	FEDERAL BUREAU OF INVESTIGATION REPORTS		3 years. Maintain paper until electronically scanned and quality control checked, prior to paper destruction.		

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PD-122	FIELD INTERROGATION REPORTS		6 years. Maintain paper until electronically scanned and quality control checked, prior to paper destruction.		
PD-123	FIREARM RECORDS AND INVENTORIES		3 years, provided audited.		
PD-124	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		
PD-125	GRANTS - AWARDED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		
PD-126	HOUSE CHECKS	Lists house, address, date leaving, date returning, cars, and lights.	30 days after return.		
PD-127	INCIDENT LOGS	Police logs. Contains dispatch time, arrival on scene time, location, date, total time, officer, parties seen, and reason for run.	7 years.		
PD-128	INTOXILYZER RECORDS		Not less than 3 years.	OAC-3701-53-01	
PD-129	JUVENILE ARREST REPORTS	Contains all information on arrest, including date, offense, officer, charge, disposition, name of subject, address, and social security number.	Until age 18 years. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction.		
PD-130	MAGAZINES	Professional and trade magazines, catalogs, reference publications and directories	Retain until no longer of administrative value (RC-3 not required).		
PD-131	MANUALS	Equipment, operating and maintenance manuals	Until equipment sold, scrapped or no longer the property of the township (RC-3 not required).		
PD-132	MASTER NAME INDEX		Permanent.		RC-3 REQUIRED
PD-133	MATERIAL SAFETY DATA SHEETS	(MSDS)	Until revised, superseded or obsolete (RC-3 not required).		
PD-134	MISSING PERSON REPORTS		20 years, or until found. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction.		
	OFFENSE REPORTS -		20 years, provided no action pending. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction.		
PD-135	FELONIES				
	OFFENSE REPORTS -		3 years, provided no action pending. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction.		
PD-136	MISDEMEANORS				
PD-137	PAWNSHOP LOGS		1 year. Maintain paper until electronically scanned and quality control checked, prior to paper destruction.		
PD-138	PLANNING/SCHEDULING / CALENDAR/TRAINING	Information and data on: display boards, erasable and dry-erase boards, chalk boards, easel pads and electronic media.	Continually updated, revised, completed, superseded or erased (RC-3 not required).		
PD-139	POLICE CASE FILES	Drunk Driving Case Files. Court files of drunk driving cases including Alcohol Influence Reports, Breath Test results. Statements of Facts by arresting officers, Accident Reports, and Driving Under the Influence (DUI) reports.	Permanent. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction.	T-21.10	

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PD-140	POLICE RECORDS	Complaint Reports. Contains complaint reports made to the Township Police Department, showing name and address of complainant, nature of complaint, results of investigation, and name of investigating officer.	Until no longer of administrative value. Appraise for historical value.		
PD-141	RADIO AND TELEPHONE LOGS		2 years.		
PD-142	RADIO/PHONE CALLS AUDIO RECORDING TAPES		30 days, erase and reuse, provided no action pending.		
PD-143	RECOVERED PROPERTY RECORDS		2 years after disposal of property.		
PD-144	REPORTS	Computer-generated administrative and fiscal reports (non-specific and periodic)	Until no longer of administrative or fiscal value, then destroy (RC-3 required for disposal).		
PD-145	PHOTOGRAPHS	General photographs, negatives and electronic images	Maintain until no longer of an administrative or historical value.		RC-3 REQUIRED <input checked="" type="checkbox"/>
PD-146	ROAD LOGS	Contains all information on messages, runs, time in and out, company responding, operator, dates, who made calls, and action taken.	5 years, provided no action pending.		
PD-147	RULES AND REGULATIONS		Until superseded.		
PD-148	SUBPOENAS, SUMMONSES, AND WARRANTS		Until discharged.		
PD-149	TEXT MESSAGES	Cellular Phone Text Messages or Similar Electronic Communications Sent or Received on Mobile Devices	Delete after Seventy-Two (72) Hours.		
PD-150	TRAFFIC CRASH REPORTS	Original copy of accident report completed by officer. Includes date, time, owners, vehicles, injuries, and citations issued.	2 years, provided no action pending. Computerized reports will be entered directly into the RMS. Maintain paper supplements until electronically scanned and quality control checked, prior to paper destruction		
PD-151	TRAFFIC CITATIONS	Contains violation, date, time, vehicle, owner, officer, and offense.	3 years, provided audited.		
PD-152	TRAINING MATERIALS FILES		Until superseded.		
PD-153	TRAINING RECORDS		Merge with personnel records upon termination with employer.		
PD-154	TYPE OF CRIME FILES		Permanent.		<input checked="" type="checkbox"/>
PD-155	VEHICLE IMPOUND RECORDS	Contains date of tow, complaint, time, tow company, officer responding, release date, lot towed to, and signature.	3 years. Maintain paper until electronically scanned and quality control checked, prior to paper destruction.		
PD-156	VOICEMAIL	Voicemail, text messages, caller ID logs, pagers, activity logs, and related IT issues.	Erase or delete when no longer of administrative value (RC-3 not required).		
PD-157	VIDEO SURVEILLANCE	Internal and external video recording system	Held for 30 day on DVR recording system and or NVR recording system.		
PD-158	BODY WORN CAMERAS		Uncategorized Data and Fire/EMS calls without Police action held 30 days. Non-evidentiary categorized recordings held for 180 days. Categorized evidentiary recordings held for not less than 180 days, or until no longer needed for evidentiary, judicial, or administrative purposes. Response to resistance and critical incident data held for 20 years.		

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Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
FD-101	ACCIDENT FILES		2 years, provided no claims pending.		
FD-102	RESPONSE REPORTS - ALL RESPONSE TYPES - ALARM, EMS, FIRE, MEDIC, CASUALTY, ETC.	Daily Run Log, Daily Alarm Log, daily run reports for Emergency Medical Service Response, Fire Response, Alarm Response, Paramedic Response, Casualty Reports and Incident reports. Contains information on runs, equipment dispatched, time, date, type of run, location, time return, and address of run	5 years, provided no action pending. **Combines Prior Records FD102, FD107, FD109, FD116, FD128 into single records category**		
FD-103	APPARATUS CHECK LIST	Contains name of item, condition of item, location, and when last inspected	Life of equipment.		
FD-104	ARSON FILES	Arson Reports. Contains date of fire, address, investigation, and personnel involved.	Permanent.		✓
FD-105	BIDS FOR EQUIPMENT (Successful)		Until equipment out of service.		
FD-106					
FD-107	BURNING COMPLAINT FILES		1 year.		
FD-108	E-MAIL	Electronic mail system (e-mail)	1 month, if no longer of any administrative value.		
FD-109	ENVIRONMENTAL PROTECTION AGENCY BURNING VIOLATION RECORDS		5 years after violation corrected.		
FD-110	EQUIPMENT MAINTENANCE RECORDS		Life of equipment.		
FD-111	FIRE PREVENTION APPLICATION PERMITS	Lists applicant, date issued, date applied, permit number, type of business, storage used, and applicant's signature	Permanent.		
FD-112	FIRE CODE	Copies.	Until superseded.		
FD-113	FIRE AND LOSS RECORDS - ARSON OR DEATH	Involving Arson or Death	Permanent.		✓
FD-114	FIRE AND LOSS RECORDS - ALL OTHER	Not Involving Arson or Death	Five (5) years, provided no action pending.		
FD-115	FIRE INSPECTION REPORTS	Contains address, date, inspector, violations, findings, and suggestions, includes code violations, arranged by address, chronologically.	Life of structure. Combines prior FD-115 & FD-124.		
FD-116	FIREWORK PERMITS		30 days after expiration.		
FD-117	GAS AND OIL DISBURSEMENT RECORDS		1 year, provided audited.		
FD-118	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		

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FD-119	GRANTS - AWARDED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		
FD-120	HYDRANT LOCATION RECORDS		Permanent.		✓
FD-121	HYDRANT MAINTENANCE RECORDS	Contains repairs of hydrant, location, cause of damage, and company making repairs	2 years after test date.		
FD-122	INCIDENT REPORTS - SEE FD 102	Contains situation found and action taken, address, owner, fire origin, number of engines, building structure, officer in charge, date, time, and alarm time.	5 years, provided no action taken.		
FD-123	INSURANCE CLAIM FILES		10 years after final settlement.		
FD-124	MASTER RUN REPORTS		3 years.		
FD-125	PERSONAL INJURY WAIVERS	Contains waiver for the release of information to fire department for employment purposes.	Merge with Clerk's Accident Files.		
FD-126	RADIO/PHONE CALLS AUDIO RECORDING TAPES		30 days, erase and reuse, provided no action pending.		
FD-127	TEXT MESSAGES	Cellular Phone Text Messages or Similar Electronic Communications Sent or Received on Mobile Devices	Delete after Seventy-Two (72) Hours.		
FD-128	TRAINING MATERIALS FILES		Until superseded.		
FD-129	TRAINING RECORDS	Contains employee's name, rank, training received, certification, dates, instructor, and grade.	Merge with Personnel Records.		
FD-130	TRUCK MILEAGE RECORDS		Life of vehicle.		
FD-131	TRUCK REPAIR RECORDS		Life of vehicle.		
FD-132	VIOLATION NOTICES	Contains address, date, owner, violation, time allowed to correct, re-inspection date, inspector.	1 year after violation corrected.		
FD-133	WORK SCHEDULES		1 year after schedule change.		

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Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
	<i>General Administration Records</i>				
IT-101	INFORMATION RESOURCES MANAGEMENT AND DATA PROCESSING SERVICES PLANS	Agency IT plans, data processing services plans, strategic plans, and related records used to plan for information systems development, technology acquisitions, data processing services provision, or related areas.	Until superseded, obsolete or replaced.	GAR-PP-02	
IT-102	DATA PROCESSING POLICIES	Records of data processing policies, including those covering access and security, systems development, data retention and disposition, and data ownership.	Until superseded, obsolete or replaced.	GAR-PP-02	
IT-103	DATA PROCESSING PRODUCT / VENDOR AND STATE CONTRACTS REFERENCE FILES	Information on data processing, equipment, software, and other products and their vendors.	Until audited, provided no action pending.	GAR-C-02	
IT-104	OGS DATA CENTER TIME BILLING RECORDS	Reports and other records from the Office of General Services detailing charges for use of the OGS computer services, including monthly billing reports, copies of vouchers and bills.	Until audited, provided no action pending.	GAR-WV-04	
IT-105	COPIES OF PURCHASE REQUISITIONS, ORDERS, AND BILLING RECORDS FOR DATA PROCESSING SERVICES	Copies of records created to initiate the purchasing process, authorize and provide funds for, or satisfy claims and expedite payments for private service providers, including copies of purchase orders, invoice requests, receipts, agency vouchers, service reports, and other supporting documentation.	Until audited, provided no action pending.	GAR-OES-04	
IT-106	RECORDS OF CHARGEBACKS TO DATA PROCESSING USERS	Electronic and manual records used to document, calculate costs and bill program units for computer usage and data processing services. These records are also used for cost recovery, budgeting, or administrative purposes. Records not covered: Chargeback records subject to Federal audit requirements should be scheduled separately.	Until audited, provided no action pending.	GAR-OES-05	
	<i>Systems and Application Development</i>				
IT-107	DATA SYSTEMS SPECIFICATIONS	Records necessary for using the system: user guides, system or sub-system definitions, system flowcharts, program descriptions and documentation, job control or work flow records, system specifications, and input and output specifications.	3 years after discontinuance of system and until all system data is destroyed or transferred to new operation environment, then destroy.		
IT-108	DATA DOCUMENTATION / DATA DICTIONARY RECORDS	Records generally created during development or modification and necessary to access, retrieve, manipulate and interpret data in an automated system, including data element dictionary, file layout, code book or table, and other records that explain the meaning, purpose, structure, logical relationships, and origin of the data elements.	3 years after discontinuance of system and until all system data is destroyed or transferred to new operation environment, then destroy.		

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IT-109	AUTOMATED PROGRAM LISTING / SOURCE CODE	Automated program code which generates the machine-language instructions used to operate an automated information system.	Retain for 3 system update cycles after code is superseded or replaced, then destroy.		
IT-110	TECHNICAL PROGRAM DOCUMENTATION	Copy of program code, program flowcharts, program maintenance log, system change notices, original design documents, specifications, requirements, acceptance tests, and other records that document computer programs and the modifications made to computer programs.	Retain until all data in system has been migrated or destroyed.		
IT-111	DATA PROCESSING PROCUREMENT FILES	Records used in the procurement of system hardware and software, including request for proposals, proposals, quotations and bids, benchmark/acceptance testing information, correspondence, duplicate copies of contracts, purchase orders, technical reviews, and vendor information, including references and literature on the firm or product line.	For sale of goods, retain 5 years, then destroy. For services, retain 16 years, then destroy.	GAR-C-01	
IT-112	TEST DATABASE / FILES	Routine or benchmark data sets, related documentation, and test results constructed or used to test or develop a system.	Retain until no longer of administrative value, then destroy.		
<i>Computer Operations and Technical Support</i>					
IT-113	DATA PROCESSING OPERATING PROCEDURES	Records of procedures for data entry, the operation of computer equipment, production control, tape library, system backup, and other aspects of a data processing operation.	Until superseded, obsolete or replaced.	GAR-PP-02	
IT-114	DATA PROCESSING HARDWARE DOCUMENTATION	Records documenting the use, operation, and maintenance of an agency's data processing equipment, including operating manuals, hardware/operating system requirements, hardware configurations, and equipment control systems.	Retain until related hardware is no longer used and all data is transferred to and made useable in new hardware environment, then destroy.		
IT-115	MAINTENANCE CONTRACTS FILES	Maintenance contracts for data processing equipment, and related records, including copies of contracts, service histories, and work orders.	For sale of goods, retain 5 years after contract expires, then destroy. For services, retain 16 years, then destroy.	GAR-C-03	
IT-116	OPERATING SYSTEM AND HARDWARE CONVERSION PLAN	Records relating to the replacement of equipment or computer operating systems.	Retain 1 year after successful conversion, then destroy.		
IT-117	DATA PROCESSING DISASTER REAREDNESS AND RECOVERY PLAN	Records related to the protection and reestablishment of data processing services, equipment and data (back-up files) in case of a disaster.	Until superseded by revised plan, then destroy.		
IT-118	SYSTEM BACK-UP FILES	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.	Retain for a minimum of 12 system back-up cycles, then destroy.		

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec.117.26 ORC

IT-119	SYSTEM USERS ACCESS RECORDS	Electronic or textual records created to control or monitor individual access to a system and its data, created for security purposes, including but not limited to user account records, security logs, and password files.	Retain until no longer of administrative value, then destroy.		
IT-120	COMPUTER USAGE FILES	Electronic files or automated logs created to monitor computer system usage, including but not limited to, log-in files, system usage files, data entry logs, and records of individual computer program usage.	Retain until no longer of administrative value, then destroy.		
IT-121	SUMMARY COMPUTER USAGE REPORTS	Summary reports and other paper records created to document computer usage.	Retain until no longer of administrative value, then destroy.		
IT-122	COMPUTER RUN SCHEDULING RECORDS	Records used to schedule computer runs, including daily schedules, run reports, run requests, and other records documenting the successful completion of a run.	Retain until no longer of administrative value, then destroy.		
IT-123	INPUT DOCUMENTS	Copies of records or forms designed and used solely for data input and control when the data processing unit provides centralized data input services and original records are retained by the program unit.	Retain until all data has been entered into the system and, if required, verified, then destroy.		
IT-124	AUDIT TRAIL FILES	Data generated during the creation of a master file or database used to validate a master file or database during a processing cycle.	Retain for a minimum of 12 database/master file backup cycles, then destroy.		
IT-125	AUTOMATED TAPE LIBRARY SYSTEM FILES	Automated records used to control the location, maintenance, and disposition of magnetic media in a tape library.	Retain until related records or media are destroyed or withdrawn from the tape library, then destroy.		
IT-126	TAPE LIBRARY CONTROL RECORDS	Records used to control the location, maintenance, and disposition of magnetic media in a tape library, including list of holdings, control logs, and scratch reports, regarding the destruction of tape library electronic files.	Until superseded, then destroy.		
<i>User / Office Automation Support</i>					
IT-127	SITE / EQUIPMENT SUPPORT FILES	Records documenting support services provided to specific data processing equipment or installations, including site visit reports, program and equipment service reports, service histories, and correspondence and memoranda. For Service contracts, see Maintenance Contracts Files, above.	Retain site visit reports, problem and equipment service reports, and routine correspondence and memoranda until warranty or guarantee of service has expired, then destroy. Retain service histories and other summary records until the related equipment is no longer in use, then destroy.	GAR-PP-02	
IT-128	HELP DESK TELEPHONE LOGS AND REPORTS	Records used to document requests for technical assistance and responses to these requests, as well as to collect information on the use of computer equipment for program delivery, security, or other purposes.	Retain until no longer of administrative value, then destroy.		
IT-129	TRAINING COURSE INFORMATION	Memoranda, flyers, catalogues, registration forms, rosters, and other records relating to training courses run by a data processing user support or office automation support unit.	Retain until superseded, obsolete, or replaced, then destroy.	GP-O-08	

Audited means: One year encompassed by the records have been audited by the Auditor of State and the audit report has been released

pursuant to Sec.117.26 ORC

IT-130	NETWORK USAGE REPORTS	Summary reports and other records created to document computer usage for reporting or other purposes.	Retain until no longer of administrative value, then destroy.		
IT-131	TEXT MESSAGES	Cellular Phone Text Messages or Similar Electronic Communications Sent or Received on Mobile Devices	Delete after Seventy-Two (72) Hours.		
IT-132	E-MAIL	Electronic mail system (e-mail)	1 month, if no longer of any administrative value.		
	<i>Miscellaneous Records</i>				
IT-133	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		
IT-134	GRANTS - AWARDED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		

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Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
SD-101	BLACKTOPPING AND RESURFACING RECORDS	Contains name of street or road, date done, who did work, what was done, completion day, cost, what materials were used, and projected redo date.	Permanent.		RC-3 REQUIRED ✓
SD-102	CERTIFICATES OF LABOR PERFORMED		Until no longer of administrative value. Appraise for historical value.		RC-3 REQUIRED ✓
SD-103	DRAGGING RECORDS	Road Dragging Records. Arranged by dragging district number. Contains name of person who dragged, date notified, date dragged, date of return card, amount charged, and amount allowed.	Obsolete. Appraise for historical value.		RC-3 REQUIRED ✓
SD-104	DITCH RECORDS	Applications, Journals, Plats and Profiles. Arranged chronologically by date of meeting. Includes a record of proceedings relative to the establishment and construction of Township and joint Township ditches, including copies of petitions for establishing ditches, petitioners' property boundaries, notices of hearings, reports of viewers, trustees' findings and orders, engineer's reports of surveys and construction cost estimates, and plan of each ditch, showing date of entry, name and number of ditch, and date construction completed.	Permanent.		RC-3 REQUIRED ✓
SD-105	EASEMENTS		Permanent.		RC-3 REQUIRED ✓
SD-106	E-MAIL	Electronic mail system (e-mail)	1 month, if no longer of any administrative value.		
SD-107	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		
SD-108	GRANTS - AWARDED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		
SD-109	INSECT CONTROL RECORDS	Contains days of spray, area done, when to re-spray, what chemicals used, time, date, and operator.	2 years.		
SD-110	JOB ORDERS	Contains date work requested, address of job, employees sent, work done, completion date, follow-up comments, and time spent on job.	3 years after completed.		
SD-111	NOTICES TO DESTROY WEEDS	Arranged chronologically. Contains date, date notified, date to destroy and what to destroy (such as Canadian Thistles), and where. Also contains property owner and address.	Until no longer of administrative value. Appraise for historical value.		
SD-112	ROAD FUND RECORDS	Expenses of Township Road and Bridge Repairs; Delinquent Road Fund Journal. Arranged chronologically by date of entry. Contains date, Township funds and orders issued, to whom paid, and amount paid.	10 years after last entry, provided audited.	ORC-507.04 ORC-5543.05	

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec.117.26 ORC

SD-113	ROAD IMPROVEMENTS RECORDS	Arranged chronologically by date of meeting. Contains a record of proceedings for the construction, reconstruction, resurfacing, or improvement of public roads, and date; accounts of receipts and expenditures, including date, items of receipts, and amount.	Permanent.	ORC-5575.09	RC-3 REQUIRED ✓
SD-114	ROAD MILEAGE/LOG REPORTS	Yearly check of miles of roads in Township.	Permanent.		✓
SD-115	ROAD RECORDS	Contains information regarding the establishment, alteration, or vacation of public roads, showing name, date, petition filed, petitioners, record of hearings on the petitions, surveys and reports, record of lands to be appropriated for the improvement, showing owner, acres owned, quantity of land to be appropriated, and resolutions granting or rejecting the petition. May also include plat and maps, accounts, and names of citizens who worked on roads.	Permanent.	ORC-507.05 ORC-5575.09	RC-3 REQUIRED ✓
SD-116	ROAD TAX RECORDS	Road Tax Duplicates; Supervisors' Abstracts of Tax Duplicates and Yearly Reports and Accounts. Arranged alphabetically by name of landowner. Contains assessments on real estate, showing names of owners, location, description, acres, value, and tax information.	Permanent.		RC-3 REQUIRED ✓
SD-117	TEXT MESSAGES	Cellular Phone Text Messages or Similar Electronic Communications Sent or Received on Mobile Devices	Delete after Seventy-Two (72) Hours.		
SD-118	WORK ORDERS	Work orders for repairs or maintenance efforts completed by department staff or personnel	3 years after completed.		

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Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
ZP-101	APPLICATIONS FOR CONDITIONAL USE <i>Under Board of Zoning Appeals Case Files</i>	Arranged by case number. Contains name of applicant, mailing address, home and business phone numbers; location, description, including subdivision name, section, township, range, block and lot number; existing use; present zoning status, description of conditional use; supporting information, such as plans for proposed use and narrative statement relative to above requirements; date and name of applicant; date filed, date of notice to parties in interest, date of notice to newspapers, and date of public hearing; fee paid, decision of Board of Zoning Appeals; if approved, conditions and safeguards prescribed; and whether denied and reason. <i>Also includes Minutes and Notice of Final Action.</i>	Permanent.		
ZP-102	BOARD OF ZONING APPEALS CASE FILES		Permanent.		
ZP-103	BOARD OF ZONING APPEALS MINUTES / ZONING COMMISSION MINUTES	Arranged chronologically by date of proceeding <i>and also in respective case files. Also includes relevant correspondence directed to members of the ZC and/or BZA.</i>	Permanent.	ORC-519.15	RC-3 REQUIRED ✓
ZP-104	CERTIFICATES AND PLANS <i>See Permit Applications</i>	Certificates of Zoning Approval. Arranged numerically. Contains number and date of certificate, to whom approval is granted and address, description of property, property owner, address, zoning fee, and date.	Permanent.		
ZP-105	CHANGE REQUESTS - Zoning Commission case files. <i>Includes changes, text amendments, and approved plan amendments.</i>	Requests for Zoning Changes, etc. Contains date, legal description of property, change in classification requested, street address of property, owner's name and address, signature, date, fee paid, and receipt number. <i>Also contains site plans, tax maps, mailing addresses of adjacent property owners, notice to parties in interest, notice to newspapers, and all correspondence and Minutes.</i>	Permanent.		
ZP-106	COMPLAINT FORMS	Arranged chronologically. Contains name of complainant, date, by whom referred, address, name of offender and address, location and nature of violation, investigation and remarks, date, name of investigator, reference code, disposition and date, re-inspection information, condition found, and recommendations. <i>Cases not immediately resolved are filed by alpha.</i>	5 years, provided no action pending.		
ZP-107	E-MAIL	Electronic mail system (e-mail)	1 month, if no longer of any administrative value.		
ZP-108	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		
ZP-109	GRANTS - AWARDED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		
ZP-110	LEGAL OPINIONS	Filed with appropriate case or complaint files and in Trustees' records.	Permanent.		✓
ZP-111	LEGAL CORRESPONDENCE	Filed with appropriate case or complaint files and in Trustees' records.	Permanent.		
ZP-112	NUISANCE ABATEMENT RECORDS	Active and inactive.	Permanent.		

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ZP-113	OVERLAY DISTRICT CASE FILES	Part of Zoning and Planning Department files, but not part of ZC or BZA. Includes applications made directly to Trustees. Contains date, legal description of property, zoning and overlay classifications, street address of property, owner's name and address, signature, date, fee paid, and receipt number. Also contains description of the request, site plans, tax maps, notice to newspapers, all correspondence and Minutes.	Permanent.		
	PERMIT APPLICATIONS -	Applications for Zoning Approval. Arranged numerically. Contains property owner and address, contractor and address, dimensions and kind of lot, proposed use of land, building dimensions and construction, proposed use of building, yard dimensions, signature, and date. Also includes date received, fee paid, certificate issued, number, and whether application denied and reason.	Permanent.		
ZP-114	BUILDINGS OR FENCES <i>All Zoning Permit Applications (temporary uses, accessories, additions, etc.) See Section 211 and Article 11 expanded for commercial projects of UTZR.</i>				
ZP-115	PERMIT APPLICATIONS - SIGNS OR BILLBOARDS	Applications for Permits to Erect or Place in Use Sign or Billboard. Contains zoning approval date, and certificate number; name of owner of sign, number and street, and name of sign company; type of sign and classification; plot plans and sketch of sign; construction and dimensions of sign, rate and fees, receipt number, height above grade, projection from building, whether an electric sign, and by whom submitted.	Permanent.		
ZP-116	PERMIT RECORDS - ALL OTHER	Applications for all other permits, listed or unlisted, as detailed above. Contains property owner and address, contractor and address, dimensions and kind of lot, proposed use of land, building dimensions and construction, proposed use of building, yard dimensions, signature, and date. Also includes date received, fee paid, certificate issued, number, and whether application denied and reason.	Permanent.		

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Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
UTCIC-101	ACCOUNT RECORDS	Arranged chronologically by date of entry. Contains date, name, purpose or source, number of warrant or voucher number, receipts and expenditures, and balance from various accounts. Although series loses administrative value rapidly, expiring by the time 10 years have elapsed, and loses fiscal value once audited, some Account Records have included Minutes and Results of Elections.	10 years after last entry, provided audited.		
UTCIC-102	AGENDAS		2 years.		
UTCIC-103	ANNUAL FINANCIAL REPORTS TO AUDITOR OF STATE	Annual HINKLE Filing with the State of Ohio.	Retain for 3 years, provided filed and audited (RC-3 Not Required).		
UTCIC-104	AUDIT REPORTS		5 fiscal years.		
UTCIC-105	BANK DEPOSIT SLIPS		4 fiscal years, provided audited.		
UTCIC-106	BANK STATEMENTS	Reconciliations.	4 fiscal years, provided audited.		
UTCIC-107	BIDS (Successful)	Contains bidder information, dates, cost of materials, labor, expected completion date, services to be provided, and penalties for non-completion.	3 fiscal years, provided audited.		
UTCIC-108	BIDS (Unsuccessful)	See above.	3 fiscal years, provided audited.		
UTCIC-109	BOND REGISTERS	Revenue Bonds.	20 fiscal years after issue called.		
UTCIC-110	BONDS, REVENUE	Redeemed Coupons	2 years after redemption, provided audited.		
UTCIC-111	BUDGETARY AND FISCAL WORK SHEETS		3 fiscal years, provided audited.		
UTCIC-112	CANCELED CHECKS		4 fiscal years, provided audited.		
UTCIC-113	CASH BOOKS	Cash Receipts and Expenditures Journals	3 years, provided audited.		
UTCIC-114	CERTIFICATIONS OF PUBLISHING LEGAL NOTICES	Shows when published, who published, for what reason, length of run, and charge.	2 years.		
UTCIC-115	CHECK REGISTERS	Stubs, duplicate copies of checks.	4 fiscal years, provided audited.		
UTCIC-116	CONSTRUCTION FILES	Arrange chronologically. Contains records relating to building or road constructions, improvements, bids, specifications, inventories, and contracts.	15 years after construction is complete.		
UTCIC-117	CONTRACTS AND AGREEMENTS		15 fiscal years.		
UTCIC-118	CORRESPONDENCE		2 fiscal years.		
UTCIC-119	DEBT ISSUANCES	Records of Debt Issuances issued by SID	5 years, following repayment of debt issue, provided audited.		
UTCIC-120	DONATIONS	Records of donations made to UTCIC.	5 fiscal years, provided audited.		
UTCIC-121	E-MAIL	Electronic mail system (e-mail)	1 month, if no longer of any administrative value.		
UTCIC-122	EMPLOYEE TIME RECORDS		3 years, provided audited.		
UTCIC-123	EMPLOYMENT RECORDS	Ohio Bureau of Employment Reports. Quarterly payroll reports.	Permanent.		

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UTCIC-124	EQUIPMENT MAINTENANCE	Equipment maintenance and repair records.	1 year after equipment sold, scrapped, or no longer the property of the UTCIC.		RC-3 REQUIRED
UTCIC-125	EQUIPMENT MISSED, DAMAGED, DESTROYED	Contains description of equipment, facts of incident, and date.	2 years.		
UTCIC-126	FEDERAL REVENUE SHARING RECORDS		Obsolete. Destroy if no longer of any administrative value.		
UTCIC-127	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		
UTCIC-128	GRANTS - RECEIVED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		
UTCIC-129	GRANTS - AWARDED	Contains records of grants awarded by the entity.	5 years, provided audited.		
UTCIC-130	INSURANCE POLICIES		2 years after expiration, provided all claims are settled.		
UTCIC-131	INVENTORIES	Lists of equipment, departmental property, dates, status, and description.	1 year, until superseded.		
UTCIC-132	LAW SUITS	(After decisions)	5 years.		
UTCIC-133	LEASES	Contains records and details about leases entered into by UTCIC, including rent rolls, etc.	5 fiscal years after expiration, provided audited.		
UTCIC-134	LOANS - RECEIVED OR ISSUED	Contains loan records of UTCIC, including loans entered into, issued, or acquired by UTCIC.	5 years, after payment in full, provided audited.		
UTCIC-135	MEMORANDUMS/NOTES	Transient notes that document the official business of UTCIC, does not include personal notes.	Until no longer of administrative value.		
UTCIC-136	MINUTES	Proceedings of UTCIC Board of Directors. Includes proceedings, election data, bonds, settlements, accounts, and other matters pertaining to the UTCIC.	Permanent.		RC-3 REQUIRED ✓
UTCIC-137	MORTGAGES	Mortgages issued or entered into by UTCIC	5 years after payment in full/satisfaction issued, provided audited.		
UTCIC-138	PROPERTY RECORDS - ACQUISITIONS AND SALES	Contains records of properties purchased and sold by UTCIC for purposes for which entity was organized. Includes records of properties transferred or disposed of to UTCIC by Township or other entities.	5 years after conclusion of sale or purchase, provided audited.		
UTCIC-139	RESOLUTIONS	Copies. Contains resolution number, reason for resolution, date passed, description of action, person introducing resolution, reference to date proposed, and action by UTCIC.	Permanent.		

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UTCIC-140	TELEPHONE MESSAGES	Calls received.	Until no longer of administrative value.		
UTCIC-141	TEXT MESSAGES	Cellular Phone Text Messages or Similar Electronic Communications Sent or Received on Mobile Devices.	Delete after Seventy-Two (72) Hours.		
UTCIC-142	VOUCHERS, INVOICES AND PURCHASE ORDERS	Contains information about payments made by UTCIC in furtherance of duties pursuant to the purposes for which formed.	4 fiscal years, provided audited.		

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Sched. No.	Record Title	Description	Retention	Legal Citation	RC-3 REQUIRED
SID-101	ACCOUNT RECORDS	Arranged chronologically by date of entry. Contains date, name, purpose or source, number of warrant or voucher number, receipts and expenditures, and balance from various accounts. Although series loses administrative value rapidly, expiring by the time 10 years have elapsed, and loses fiscal value once audited, some Account Records have included Minutes and Results of Elections.	10 years after last entry, provided audited.		
SID-102	AGENDAS		2 years.		
SID-103	ANNUAL FINANCIAL REPORTS TO AUDITOR OF STATE	Annual HINKLE Filing with the State of Ohio.	Retain for 3 years, provided filed and audited (RC-3 Not Required).		
SID-104	ASSESSMENT RECORDS	Records of Assessments Levied within District	5 years, after conclusion of assessments, provided audited.		
SID-105	ASSESSMENT COLLECTIONS FROM COUNTY AUDITOR	Records of semi-annual assessments collected and attributable to the SID, held or transferred to the Township as fund custodian.	5 years, after conclusion of assessments, provided audited.		
SID-106	AUDIT REPORTS		5 fiscal years.		
SID-107	BANK DEPOSIT SLIPS		4 fiscal years, provided audited.		
SID-108	BANK STATEMENTS	Reconciliations.	4 fiscal years, provided audited.		
SID-109	BIDS (Successful)	Contains bidder information, dates, cost of materials, labor, expected completion date, services to be provided, and penalties for non-completion.	3 fiscal years, provided audited.		
SID-110	BIDS (Unsuccessful)	See above.	3 fiscal years, provided audited.		
SID-111	BOND REGISTERS	Revenue Bonds.	20 fiscal years after issue called.		
SID-112	BONDS, REVENUE	Redeemed Coupons	2 years after redemption, provided audited.		
SID-113	BUDGETARY AND FISCAL WORK SHEETS		3 fiscal years, provided audited.		
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SID-118	CONSTRUCTION FILES	Arrange chronologically. Contains records relating to building or road constructions, improvements, bids, specifications, inventories, and contracts.	15 years after construction is complete.		
SID-119	CONTRACTS AND AGREEMENTS		15 fiscal years.		
SID-120	CORRESPONDENCE		2 fiscal years.		
SID-121	DEBT ISSUANCES	Records of Debt Issuances issued by SID	5 years, following repayment of debt issue, provided audited.		
SID-122	DONATIONS	Records of donations made to District	5 fiscal years, provided audited.		

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SID-123	E-MAIL	Electronic mail system (e-mail)	1 month, if no longer of any administrative value.		
SID-124	EMPLOYEE TIME RECORDS		3 years, provided audited.		
SID-125	EMPLOYMENT RECORDS	Ohio Bureau of Employment Reports. Quarterly payroll reports.	Permanent.		
SID-126	EQUIPMENT MAINTENANCE	Equipment maintenance and repair records.	1 year after equipment sold, scrapped, or no longer the property of the UTCIC.		RC-3 REQUIRED (No RC-3 required)
SID-127	EQUIPMENT MISSED, DAMAGED, DESTROYED	Contains description of equipment, facts of incident, and date.	2 years.		
SID-128	FEDERAL REVENUE SHARING RECORDS		Obsolete. Destroy if no longer of any administrative value.		
SID-129	GRANT APPLICATIONS	Records of grants applied for, purpose, application materials, and supporting documentation.	5 years.		
SID-130	GRANTS - RECEIVED	Contains purpose of grant, funds applying for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.	Permanent.		
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SID-135	LEASES	Contains records and details about leases entered into by SID including rent rolls, etc.	5 fiscal years after expiration, provided audited.		
SID-136	LOANS - RECEIVED OR ISSUED	Contains loan records of SID, including loans entered into, issued, or acquired by SID.	5 years, after payment in full, provided audited.		
SID-137	MEMORANDUMS/NOTES	Transient notes that document the official business of SID, does not include personal notes.	Until no longer of administrative value.		
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SID-140	PROPERTY RECORDS - ACQUISITIONS AND SALES	Contains records of properties purchased and sold by SID for purposes for which entity was organized. Includes records of properties transferred or disposed of to SID by Township, UTCIC, or other entities.	5 years after conclusion of sale or purchase, provided audited.		
SID-141	RESOLUTIONS	Copies. Contains resolution number, reason for resolution, date passed, description of action, person introducing resolution, reference to date proposed, and action by SID.	Permanent.		
SID-142	TELEPHONE MESSAGES	Calls received.	Until no longer of administrative value.		
SID-143	TEXT MESSAGES	Cellular Phone Text Messages or Similar Electronic Communications Sent or Received on Mobile Devices.	Delete after Seventy-Two (72) Hours.		
SID-144	VOUCHERS, INVOICES AND PURCHASE ORDERS	Contains information about payments made by SID in furtherance of duties pursuant to the purposes for which formed.	4 fiscal years, provided audited.		

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UNION TOWNSHIP RECORDS COMMISSION

2025 ANNUAL MEETING

MEETING MINUTES

JULY 21, 2025

The Union Township Records Commission met in a Public Hearing pursuant to Ohio Revised Code Section 121.22, on JULY 21, 2025 at 4:00 PM, with the following members present:

Mr. Michael Logue, Union Township Trustees Chairman

Mr. Ronald B. Campbell, Union Township Fiscal Officer

Old Business

None.

New Business

Mr. Campbell indicated that there was a need to update the Township retention schedule to accommodate revisions to retention schedules for all departments to include and clarify records retention requirements for previously unscheduled records, to further review each table for consistency among the departments, and to act to update the record category numbering to reflect these modifications. In addition, the schedule was further updated to denote when RC-3 forms were required previously, based on prior approved retention schedules, and also now includes the Auditor of State "Audited" definition as per the amended 2024 schedule.

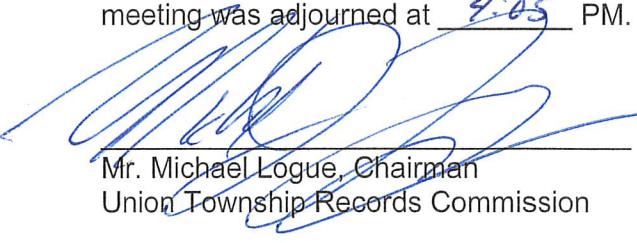
Mr. Logue made a motion to approve the retention schedule as presented and to authorize the filing of said schedule with the Ohio Historical Society. Motion seconded by Mr. Campbell.

Upon conducting roll call, the vote was as follows:

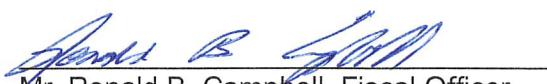
Mr. Campbell – Yes, Mr. Logue – Yes.

As there being no further business before the Union Township Records Commission, the meeting was adjourned at 4:05 PM.

*Mr. Campbell MADE MOTION TO ADJOURN. MC LOGUE
SECONDED.*


Mr. Michael Logue, Chairman
Union Township Records Commission

21 July 2025
Date


Mr. Ronald B. Campbell, Fiscal Officer
Union Township Records Commission

7/21/2025
Date