



Ohio History Connection
State Archives of Ohio
Local Government Records Program
800 E. 17th Avenue
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www.ohiohistory.org/lgr

ORIGINAL

OCT 01 2021

RECORDS RETENTION SCHEDULE (RC-2)– Part 1

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

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

Section A: Local Government Unit

Medina County Board of Developmental Disabilities

(Local Government Entity)

(Unit)

Stacey Maleckar

Stacey Maleckar

Superintendent

9/21/2021

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

Medina County Records Commission

330-725-9782

(Telephone Number)

144 North Broadway St.

Medina

44256

Medina

(Address)

(City)

(Zip Code)

(County)

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

maryb@mcbbd.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.

[Signature]
Records Commission Chair Signature

9/21/21
Date

Section C: Ohio History Connection - State Archives

[Signature]
Signature

Local Government Records Archivist
Title

11/3/21
Date

Section D: Auditor of State

Records Manager

Signature

Title

Date

Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form

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

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Medina County Board of Developmental Disabilities

(Local Government Entity)

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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
R-109	Accident Reports (Students/Adult Enrollees) *Form used for enrollees' medical injuries	7 years prior to Q, 2007 and older 7 Years	Paper/ Electronic		<input type="checkbox"/>
R-136	Adult Services Staff Registration/Certification/ Signature Sheet	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-153	Affirmative Action Plan (applicant flow chart)	3 years	Paper/ Electronic		<input type="checkbox"/>
R-154	Affirmative Action Progress Report	3 years	Paper/ Electronic		<input type="checkbox"/>
R-249	Agency-Based Registration (Voter Registration Transmittal Forms)	2 years	Paper/ Electronic		<input type="checkbox"/>
R-40	Agency Plans <ul style="list-style-type: none"> Action Plans Operating Plans Strategic Plans 	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/> ✓
R-59	Agency Surveys <ul style="list-style-type: none"> Parent Public Staff 	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>
	<ul style="list-style-type: none"> CARF/Accreditation 	10 years	Paper/ Electronic		<input type="checkbox"/>
R-20	Application Packet and Supporting Documentation for Employment (not hired)	3 years	Paper/ Electronic		<input type="checkbox"/>
R-1	Audit/Performance Review Report	10 years	Paper/ Electronic		<input type="checkbox"/>
R-2	(Bids Successful) (Bids (Unsuccessful) *Records documenting publicizing, hearing, and awarding quoted bids from vendors for services or merchandise including bonding information, specification sheets, bid forms and amounts, references, etc.	15 years 3 years	Paper/ Electronic		<input type="checkbox"/>
R-3	Board Committee Minutes <ul style="list-style-type: none"> Donated Funds Committee 	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/> ✓

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	<ul style="list-style-type: none"> Ethics Committee 				
R-4	Board Meeting Minutes & Agendas <ul style="list-style-type: none"> Board Retreat Open Forum Regular Special Meetings 	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-5	Board Meeting Packets	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-284	Board Member Files	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-291	Board Resolutions (Approved)	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-6	Boiler Operation License/Certificate	1 year after expiration	Paper/ Electronic		<input checked="" type="checkbox"/>
R-290	Budget (Approved)	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-7	Building Blue Prints <ul style="list-style-type: none"> Public Building 	Permanent Until updated, superseded or obsolete. Appraise for historical value	Paper/ Electronic		<input checked="" type="checkbox"/>
R-8	Building Inspection Records	10 years	Paper/ Electronic		<input type="checkbox"/>
R-193	Building Key Assignments	2 years after separation of employment	Paper/ Electronic		<input type="checkbox"/>
R-161	Building Keys Related Forms	Until obsolete	Paper/ Electronic		<input type="checkbox"/>
R-70	Building Leases/Rental Agreements	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-9	Building Occupancy Permits	Until Superseded	Paper/ Electronic		<input type="checkbox"/>

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R-298	Calendars <ul style="list-style-type: none"> • MCBDD • Windfall School 	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-288	Closed Children/Adult Eligibility Inquiry files with no follow-through from the family	10 years	Paper/ Electronic		<input checked="" type="checkbox"/>
R-10	Committee Minutes/Agenda (other than Board) <ul style="list-style-type: none"> • Sign in Sheets 	Until obsolete as determined by chair	Paper/ Electronic		<input checked="" type="checkbox"/>
R-300	Computer Storage Media <ul style="list-style-type: none"> • Hard Disk Drive (HDD) • Solid State Drive (SSD) • Solid State Hybrid Drive (SSHD) 	Until no longer needed for administrative purposes	Electronic		<input type="checkbox"/>
R-273	Consent Forms <ul style="list-style-type: none"> • Photographs, videos, audio • Screenings (BMI, Vision, Hearing) • Windfall School Roster 	6 years from the last effective date	Paper/ Electronic		<input type="checkbox"/>
R-171	Contractor/Vendor's Conflict of Interest Questionnaire	7 years	Paper/ Electronic		<input type="checkbox"/>
R-14	Contracts for Service (Independent Contractors) <ul style="list-style-type: none"> • Agreement among MCBDD, Independent Private Duty Nurse/Private Duty Agency, and Enrollee (or Responsible Party) • Memorandum of Understanding (MOU) • Business Associate Agreement (BA) 	Permanent 15 years after contract expiration	Paper/ Electronic		<input type="checkbox"/>
R-246	Correspondence: Executive	According to subject matter	Paper/ Electronic		<input checked="" type="checkbox"/>
R-244	Correspondence: General <ul style="list-style-type: none"> • Email 	According to subject matter	Paper/ Electronic		<input type="checkbox"/>
R-283	Correspondence: Legal	Permanent	Paper/ Electronic		<input type="checkbox"/>

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

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R-245	Correspondence: Routine Form Letters	1 year	Paper/ Electronic		<input type="checkbox"/>
R-15	Cost Report and Back-up Documentation <ul style="list-style-type: none"> • Accounts Payable/Receivable Voucher Packet • Funding Records and Grant Documentation • Needs Committee Review Form • Receipt Books • Staff Ratio Sheets • Supported Living Documentation • Family Support Services Documentation (FSS) • Title XX Documentation • Transit Billing Logs • VRP Contract (Vocational Rehabilitation Partnership) • Personal Activity Report • Adult Services Documentation Sheets (aka Data Sheets) Service Documentation Sheets, Skill Development Documentation Sheets • Medicaid Documentation • Operating Travel Expense Report • Transportation Billing • Consumer Attendance Record/Manifest • Field Trip Requests (Trip Tickets) • Opportunities for 	<p>6 years from the date payment is received or until an initiated audit is resolved, whichever is longer</p> <p>Cost reports are subject to audit by DODD, the Ohio Department of Medicaid, and the Centers of Medicare and Medicaid Services (CMS) at their discretion. Records and documentation used to prepare the report must be kept on file for a period of 7 years after the final settlement.</p>	Paper/ Electronic		<input type="checkbox"/>

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	Ohioans with Developmental Disabilities (aka Vocational Rehabilitation <ul style="list-style-type: none"> Partnership, VRP, and Bureau of Vocational Rehabilitation, (BVR) 				
R-16	Department Meeting Minutes	Current year/plus 3 years	Paper/ Electronic		<input type="checkbox"/>
R-275	Digital Media <ul style="list-style-type: none"> Floppy Discs CD ROMs Cassette Tapes (does not include Board cassettes) 	Until no longer needed for administrative purposes	Paper / Electronic		<input type="checkbox"/>
R-17	Disaster Plans	Until superseded	Paper/ Electronic		<input type="checkbox"/>
R-281	Early Intervention Service Coordination Files	After the child's 9 th birthday 6 years after the enrollee's third birthday	Paper/ Electronic		<input type="checkbox"/>
R-19	Emergency Drill Records	10 years	Paper/ Electronic		<input type="checkbox"/>
R-293	Employee Medical Files <ul style="list-style-type: none"> Accident Reports FMLA Medical/Dental Miscellaneous Supplemental Benefits 	Age 70 or 10 years following separation of employment, whichever comes later	Paper/ Electronic		<input type="checkbox"/>
R-71	Employee Request for Leave Forms	3 years	Paper/ Electronic		<input type="checkbox"/>
R-138	Employee Sick and Vacation Budget Request Forms	2 years	Paper/ Electronic		<input type="checkbox"/>
R-20	Employment Applications (not hired)	3 years	Paper/ Electronic		<input type="checkbox"/>
R-89	Employee Sick and Vacation Payment Request Forms	6 years	Paper/ Electronic		<input type="checkbox"/>

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R-13	Enrollee Records <ul style="list-style-type: none"> • Active • Closed/Eligible • Deceased 	10 years following the death of the enrollee	Paper/ Electronic		<input type="checkbox"/>
R-23	Equipment Records	Life of Equipment	Paper/ Electronic		<input type="checkbox"/>
R-98	Evaluation Worksheet for ODD (H.R. copy)	Retain until employee obtains Provisional Certification	Paper/ Electronic		<input type="checkbox"/>
R-247	Family Delegation (med passing)	7 years	Paper/ Electronic		<input type="checkbox"/>
R-25	Fax Cover Sheets with Identifying Information	Permanent According to subject Matter * If part of an enrollee record, the retention period is 10 years after death (R-13)	Paper/ Electronic		<input type="checkbox"/>
R-26	Fax Transmission Logs	Current year/plus 3 years	Paper/ Electronic		<input type="checkbox"/>
R-174	Field Experience Packet Student Data Form <ul style="list-style-type: none"> • High school and college students/field observation and/or shadowing Student Release <ul style="list-style-type: none"> • High school and college students/field observation and/or shadowing Student Service Plan <ul style="list-style-type: none"> • High school and college students/field observation and/or shadowing 	3 years	Paper/ Electronic		<input type="checkbox"/>
R-196	Financial Reports (monthly)	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-28	Food Preparation License/Certificate	One year after expiration	Paper/ Electronic		<input type="checkbox"/>

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R-140	Hand Written Notes/Employee <ul style="list-style-type: none"> Personal 	According to subject matter as determined by originator or upon termination of employment	Paper		<input type="checkbox"/>
R-30	Health Department Inspection Reports	Current year/plus 3 years	Paper/ Electronic		<input type="checkbox"/>
R-287	Home and Community Based Services Site Settings Review- Residential or Day Program <i>*Form used to ensure site meets setting srules.</i>	Current year/past year	Paper/ Electronic		<input type="checkbox"/>
R-152	In-service Evaluation Forms	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>
R-191	In-service Sign-in Sheets	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-32	Insurance Policies	5 years	Paper/ Electronic		<input type="checkbox"/>
R-33	Labor Negotiation Documentation	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-34	Levy Records	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-35	Lunch Program	Current year/plus 3 years	Paper/ Electronic		<input type="checkbox"/>
R-194	Maintenance Requests	2 years	Paper/ Electronic		<input type="checkbox"/>
R-39	Major Unusual Incident Reports (MUIs) <ul style="list-style-type: none"> MUI Hotline Four Hour Notification Call/Report Form 	7 years	Paper/ Electronic		<input type="checkbox"/>
R-36	Material Safety Data Sheets (MSDS)	30 years	Paper/ Electronic		<input type="checkbox"/>
R-241	MCBDD Priority Categories Review Request	7 years	Paper/ Electronic		<input type="checkbox"/>
R-274	MCBDD Records Storage Form	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-264	Medical Emergency Information (replaced Student/Adult Medical Emergency Information)	Permanent Current year/ plus, past 2 years	Paper/ Electronic		<input type="checkbox"/>

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R-248	Medication Transport/Transfer Log	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>
R-150	Medina County Board of DD Adjusted Schedule Request	6 year	Paper/ Electronic		<input type="checkbox"/>
R-250	Medina County Board of Developmental Disabilities A Designated Voter Registration Agency Notice of Rights/Declination Form	2 years	Paper		<input type="checkbox"/>
R-180	Medina County Board of Developmental Disabilities Grounds Use Permit	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-213	Medina Creative Living IV Ohio Housing and Financing Administration Rent Subsidy Application <i>*Helps create wait list for Residential Services for MCBDD</i>	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-38	Meeting Room/Facility Rental Calendars	Current year/plus 2 years	Paper/ Electronic		<input type="checkbox"/>
R-242	Notice to request a County Conference	7 years	Paper/ Electronic		<input type="checkbox"/>
R-197	Ohio Department of Education In-service Training Form/Pre- school/School Age Child Care Programs (staff form)	5 years	Paper/ Electronic		<input type="checkbox"/>
R-77	OSHA Records (copies)	5 years	Paper/ Electronic		<input type="checkbox"/>
R-115	Payroll Documentation <ul style="list-style-type: none"> • Payroll Distribution Report • Payroll Transmittal Report • Payroll Adjustment Notes 	5 years	Paper/ Electronic		<input type="checkbox"/>
R-289	Personal Day Conversion Forms <i>*Used to payout employees remaining Personal Day balance at the end of each year.</i>	6 years	Paper/ Electronic		<input type="checkbox"/>

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R-4 I	Personnel Records (<i>individual</i>) <ul style="list-style-type: none"> • Job Descriptions/Postings (located in the personnel record) • OPERS Personal History Record (Form A) • SSA 1945 Form Statement Concerning You (Employment in a job not covered by Social Security) • Application Packet and Supporting Documentation for Employment (hired) • Disciplinary Action (staff) • Employee Training Sign-in Sheet • Staff Training Certificates • Staff Training Records • Application for Registration and Certification (HR copy) • Conflict of Interest Disclosure Statement • Abuser Registry Annual Notice (HR copy) • Employment Verification/Financial (HR copy) • HIPAA Training Verification • New Employee Orientation Training Verification Sheet (summary of orientation program) • Drug-Free Workplace Policy Acknowledge 	Age 70, or 10 years following separation of employment, whichever comes later	Paper/ Electronic		<input type="checkbox"/>

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	<ul style="list-style-type: none"> Agreement • Certification/Registration/Licensure • Computer Network Responsibility Form • Technology Access Checklist and Information Form • Time Sheets • Employment Verification/Financial (HR copy) • Service & Support Administration Verification Sheet (SSA Rule) <i>(retained at the SSA Office)</i> 				
R-42	Policies	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-144	Policies (index and table of contents)	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-43	Procedures	Until superseded	Paper/ Electronic		<input type="checkbox"/>
R-143	Procedures (Table of Contents)	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-108	Professional Training Requisition	3 years	Paper Electronic		<input type="checkbox"/>
R-282	Public Meeting Notices	Current year/plus, 2 years	Paper/ Electronic		<input type="checkbox"/>
R-286	Public Records Request Form (Request to inspect and review public records)	3 years	Paper/ Electronic		<input type="checkbox"/>
R-45	Public Relations Files	3 years	Paper/ Electronic		<input type="checkbox"/>
R-46	Publications (Newsletters, Annual Reports etc.)	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/>
R-296	Quality Assurance Documentation for Scanned Records	10 years Destroy paper once scanned	Paper/ Electronic		<input type="checkbox"/>
R-47	Recordings of Board Meetings	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-255	Records Destruction Certificate	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-160	Records Destruction Request Form	Permanent	Paper/ Electronic		<input type="checkbox"/>

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R-76	Records of Ineligible Adults	10 years	Paper/ Electronic		<input type="checkbox"/>
R-106	Records of Ineligible Children	10 years past their 21st birthday	Paper/ Electronic		<input type="checkbox"/>
R-294	Records Retention Schedules RC-1, RC-2, RC3	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-125	Rehabilitation Technology Project Analysis Report	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-50	Rosters (Annual) <ul style="list-style-type: none"> • Board • Adult Enrollee • Personnel • Student • OEA & AFSCME 	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-295	Scanned Records *(Excludes paper records with permanent retention i.e. Board Packets, etc.)	90 days after Quality Assurance has been completed	Paper		<input type="checkbox"/>
R-225	School Bus Driver Pre-Trip Form	1 year after vehicle is traded or disposed of	Paper		<input type="checkbox"/>
R-51	School Bus Emergency Evacuation Results	5 years	Paper/ Electronic		<input type="checkbox"/>
R-41	Service & Support Administration Verification Sheet (SSA Rule) <i>(retained at the SSA Office)</i> Added to R-41 on pg. 11	Age 70, or 10 years following separation of employment, whichever comes later	Paper/ Electronic		<input type="checkbox"/>
R-52	Software Licenses	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>
R-103	Staff Absentee Forms	3 years	Paper/ Electronic		<input type="checkbox"/>

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R-53	Staff Background Check Material <ul style="list-style-type: none"> Abuser Registry Information Criminal Affidavit Form Drivers Abstracts Pre-employment Dept. of Transportation Office of Inspector General Abuser Registry Sex Offender U.S. General Services Department of Rehabilitation and Correction Drivers Abstracts <ul style="list-style-type: none"> Non- Department of Transportation 	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-54	Staff Calendars	Current year/plus one year	Paper/ Electronic		<input type="checkbox"/>
R-151	Staff Satisfaction Survey	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>
R-79	Statistics-year end (unduplicated count of individuals served)	Permanent	Paper/ Electronic		<input checked="" type="checkbox"/> ✓
R-80	State of Ohio Department of Education License to Operate	3 years	Paper/ Electronic		<input type="checkbox"/>
R-219	Statement of Confidentiality	Until new one has been updated manually	Paper/ Electronic		<input type="checkbox"/>
R-56	State Patrol Inspection Report	Life of Vehicle	Paper/ Electronic		<input type="checkbox"/>
R-195	Superintendent Correspondence	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>

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R-285	Surveillance Tapes/Videos	Use for one cycle then reuse provided no action pending	Electronic		<input type="checkbox"/>
R-297	Table of Organization	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-301	Tablet Computers with Personal, Identifiable Information	Until no longer needed for administrative purposes	Electronic		<input type="checkbox"/>
R-62	Transportation Requests	Current year/past year	Electronic		<input type="checkbox"/>
R-63	Transportation Work Orders/Vehicle Maintenance Documentation	1 year after the vehicle is traded or disposed of	Paper/ Electronic		<input type="checkbox"/>
R-292	Union Contracts <ul style="list-style-type: none"> OEA (Ohio Education Association) AFSCME (American Federation of State, County and Municipal Employees) 	Permanent	Paper/ Electronic		<input type="checkbox"/>
R-299	Unusual Incident Reports (UIRs)	7 years	Paper/ Electronic		<input type="checkbox"/>
R-65	Vehicle Accident Report	1 year after the vehicle is traded or disposed of	Paper/ Electronic		<input type="checkbox"/>
R-182	Vehicle E-check, Inspections	Life of Vehicle with MCBDD290	Paper/ Electronic		<input type="checkbox"/>
R-91	Vehicle Identification Card	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>
R-64	Vehicle Log Form (aka Van logs)	Current year/plus, 2 years	Paper/ Electronic		<input type="checkbox"/>
R-66	Vehicle Check List Form (aka Vehicle Pre-Trip Inspection Forms)	1 year after the vehicle is traded or disposed of	Paper		<input type="checkbox"/>

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R-67	Vehicle Titles	Until vehicle is traded or disposed of	Paper/ Electronic		<input type="checkbox"/>
R-68	Visitor Log <ul style="list-style-type: none"> • Staff Sign In-out Logs • Student Sign In/out Logs 	Current year/plus, 2 years	Paper/ Electronic		<input type="checkbox"/>
R-169	Volunteer Application <ul style="list-style-type: none"> • Sign-in Sheets for Events • Evaluation • Supervisor Evaluation • Service Plan • Medical Information • Service Record • Volunteer Handbook • Referral to Volunteer Services (staff in need of a volunteer, or are referring a volunteer) 	Until no longer needed for administrative purposes	Paper/ Electronic		<input type="checkbox"/>
R-102	Windfall School Peer Information Packet <ul style="list-style-type: none"> • Peer Vision Screening 	Current year/plus, 1 year	Paper/ Electronic		<input type="checkbox"/>