



## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

#### Administration

**West Chester Township**

(Revises Administration Schedule approved 05/26/2021)

(local government entity)

(unit)

**Larry D. Burks**

**Township Administrator**

**4/25/2022**

(signature of responsible official)

(name)

(title)

(date)

### Section B: Records Commission

**West Chester Township**

**513-777-5900**

Records Commission

(telephone number)

**9113 Cincinnati Dayton Road**

**West Chester**

**45069**

**Butler**

(address)

(city)

(zip code)

(county)

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

[jwhittaker@WestChesterOH.org](mailto:jwhittaker@WestChesterOH.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.

4/26/2022

Records Commission Chair Signature / **Mark S. Welch, Chair, Board of Trustees**

Date

### Section C: Ohio Historical Society - State Archives

**Government Records Archivist**

**6/13/2022**

Signature

Title

Date

### Section D: Auditor of State

Signature

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**



**Ohio Historical Society**  
**State Archives of Ohio**  
**Local Government Records Program**

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township Administration**  
 (Revises Administration Schedule approved 05/26/2021)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                     | (3)<br>Retention<br>Period                                                                                | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| ADM-10-01                 | <b>Aggregation Records</b><br>Electric and gas aggregation services including correspondence, worksheets reports and other documents                                                                                                    | 1 year<br>and no longer of<br>administrative<br>value                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-02                 | <b>Annexation Records</b><br>Includes petitions, agreements, maps, correspondence, etc.                                                                                                                                                 | Permanent                                                                                                 | Paper                 |                                                         | ✓                                          |
| ADM-10-03                 | <b>Audiovisual Productions</b><br>Township promotional information, instructional materials, public service announcements; local sports, Chamber of Commerce events, local community events, etc.                                       | Until information is<br>no longer current<br>Appraise for<br>historical value                             | DVD /<br>Digital      |                                                         | ✓                                          |
| ADM-10-04                 | <b>Bond Issue Files</b><br>Correspondence, general documentation, bond ratings, official statement, bond schedule & other documents (See also ADM-13-054)                                                                               | 2 years<br>after final payment                                                                            | Paper                 |                                                         | <input type="checkbox"/>                   |
| ADM-10-06                 | <b>Collective Bargaining Documents</b><br>Documents that assist in the preparation, review and decision-making processes                                                                                                                | 1 year<br>after contract<br>expired and no<br>longer of<br>administrative<br>value                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-07                 | <b>Cooperative Purchasing</b><br>Ohio DAS Cooperative Purchasing Program including member number, purchasing schedules, training offers, usage reports, etc.                                                                            | Until superseded<br>or no longer of<br>administrative<br>value                                            | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-012                | <b>Elevator Certifications</b>                                                                                                                                                                                                          | 1 year<br>after superseded                                                                                | Paper                 |                                                         | <input type="checkbox"/>                   |
| ADM-10-013                | <b>Time Off Requests</b><br>Requests for time off including vacation, sick, personal and comp time; administrative reference only, official records in HR                                                                               | Life of system<br><br>Paper copy 1 year<br>and no longer of<br>administrative<br>value                    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-014                | <b>Permits and Licenses</b><br>Applications for road closures, road races, parades or block parties. May include application, executed agreement or permit, license agreement, site maps, certificates of insurance and other documents | 1 year<br>after event<br>or superseded<br>and no longer of<br>administrative<br>value<br>provided audited | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



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Section E: Records Retention Schedule

**West Chester Township Administration**  
(Revises Administration Schedule approved 05/26/2021)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                          | (3)<br>Retention<br>Period                                             | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| ADM-10-016                | <b>Property or Space Use</b><br>Records relating to the use of township property by non-profits and other organizations. Includes, correspondence, requests and applications, insurance certificates, and quarterly summary reports                                                          | 1 year after vacating property and no longer of administrative value   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-017                | <b>Fleet Records</b><br>Titles, registrations, licensing, purchase, sale and trade records; includes recall notices and various notices and forms from and to the BVM                                                                                                                        | 1 year after vehicle is sold or disposed                               | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-019                | <b>Historic Designations</b><br>State or federal historic designations for buildings, structures or districts within the township and preservation of historic structures                                                                                                                    | Permanent                                                              | Paper                 |                                                         | ✓                                          |
| ADM-10-020                | <b>Historical and Archaeological Site Records</b><br>Records relating to archaeological and historical sites in the township                                                                                                                                                                 | Permanent                                                              | Paper /<br>Electronic |                                                         | ✓                                          |
| ADM-10-021                | <b>Incident / Injury Reports</b><br>Record of employee vehicle accidents and property damage: Initial report, police report, correspondence, photos, and other documents supporting incident and including insurance coverage records ( <i>See also WCT-09-033 and HR-09-040 &amp; 041</i> ) | 2 years after all claims settled and no longer of administrative value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-022                | <b>Insurance Policies</b><br>Policy and documents issued by insurance company to outline liability and other coverage and risk control standards for the township under the insurance policy ( <i>See also ADM-13-057</i> )                                                                  | 2 years after superseded provided all claims are settled               | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-023                | <b>Insurance Certificates</b><br>Documents provided by insurance providers as proof of insurance coverage for specific purposes including but not limited to events, vehicle or equipment rentals, facility use, etc.                                                                        | 1 year after expired or superseded                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



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Section E: Records Retention Schedule

West Chester Township

Administration

(Revises Administration Schedule approved 05/26/2021)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period                                                       | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| ADM-10-024                | <b>Inventory, Annual Township</b><br>Annual listing to track and control fixed assets including land and buildings, motor vehicles, furniture, office equipment, computers, fixtures and fittings, and machinery and other items owned or administered by the township (RC §505.04) (Department Inventory WCT-09-034)                  | 3 years<br>after superseded<br>and no longer of<br>administrative<br>value       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-025                | <b>Landfill Records</b><br>Records pertaining to permit and application, reviews, monitoring, inspections, investigations, surveys, screenings, testing of land uses and activities (i.e. "Skinner Landfill" records)                                                                                                                  | 5 years<br>after site ceases<br>operation                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-026                | <b>Legal Opinions</b><br>Formal opinions written by legal counsel to advise and present the basis and rationale for legal recommendations                                                                                                                                                                                              | Permanent                                                                        | Paper                 |                                                         | ✓                                          |
| ADM-10-027                | <b>Legislative Tracking Files</b><br>Correspondence, copies of existing or proposed legislation, constituent concerns, legal research and attorney notes                                                                                                                                                                               | Until no longer of<br>administrative<br>value                                    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-028                | <b>Law Suits</b><br>Includes notes, reports, background material, settlement records, affidavits, summons and complaints, claims for damages, initial and final agreements, responses, orders of dismissals, notice and general appeal, legal briefs, and transcripts of proceedings, orders, court decisions, and related information | 10 years<br>after case closed<br>and no action<br>pending                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-030                | <b>Meeting Records, Executive &amp; File Copies</b><br>Personal documentation of trustee public meetings collected and used for reference, including agenda, exhibits, resolutions, indexes, staff reports, notes, correspondence and purchase requisitions                                                                            | After meeting<br>minutes approved<br>and no longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-031                | <b>Agendas and Supporting Documentation</b><br>Order of items to be discussed by the trustees at public meetings. Include support docs, item summaries and rationale for staff recommendations                                                                                                                                         | Permanent                                                                        | Electronic            |                                                         | <input type="checkbox"/>                   |



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Section E: Records Retention Schedule

**West Chester Township Administration**  
(local government entity) (unit)  
(Revises Administration Schedule approved 05/26/2021)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                  | (3)<br>Retention<br>Period                                                                       | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| ADM-10-032                | <b>Newsletter</b><br>Township newsletter distributed to subscribers                                                                                                                                                  | Retain one paper<br>copy<br>permanently.<br>Life of system /<br>database                         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-034                | <b>Public Relations Records</b><br>News, press releases, or any public relations files<br>maintained or issued by township. Includes print,<br>electronic, audio and audiovisual records                             | 2 years<br>after action or<br>event and no<br>longer of<br>administrative or<br>historical value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-036                | <b>Project Files, Administrative</b><br>Subject files in alpha order containing records of<br>various issues organized by title, person, subject or<br>other area of interest that are not part of another<br>series | Until no longer of<br>administrative<br>value                                                    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-037                | <b>Construction Files</b><br>Records related to building or road construction or<br>significant renovations of existing properties.<br>Includes correspondence, specifications and<br>drawings                       | Life of structure                                                                                | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-039                | <b>Property, Sale or Transfer</b><br>Records pertaining to transactions for the sale or<br>trade of land, buildings or other real property                                                                           | Permanent                                                                                        | Paper                 |                                                         | ✓                                          |
| ADM-10-040                | <b>Property Files, Deeds and Other Legal<br/>Documents Reflecting Legal Title</b><br>Deeds, appraisals, surveys, description of property,<br>restrictions and all other similar documents                            | Permanent                                                                                        | Paper                 |                                                         | ✓                                          |
| ADM-10-041                | <b>Property Files, Easement and Right-of-Way</b><br>Documents granting or receiving easements or<br>right of way                                                                                                     | Permanent                                                                                        | Paper                 |                                                         | ✓                                          |
| ADM-10-043                | <b>Road Improvement Records</b><br>Documents construction, reconstruction,<br>resurfacing, or improvement of public roads, curbs<br>and storm pipes                                                                  | Permanent                                                                                        | Paper /<br>Electronic |                                                         | ✓                                          |
| ADM-10-044                | <b>Road Records</b><br>Documents include records of acceptance;<br>vacation; speed control; widening; calming devices;<br>stop signs and "no parking" designations                                                   | Permanent                                                                                        | Paper                 |                                                         | <input type="checkbox"/>                   |
| ADM-10-045                | <b>Road Studies</b><br>Includes traffic studies, county engineer projects,<br>problems and projects                                                                                                                  | 10 years                                                                                         | Paper                 |                                                         | <input type="checkbox"/>                   |



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**West Chester Township Administration**  
(Revises Administration Schedule approved 05/26/2021)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                     | (3)<br>Retention<br>Period                                                               | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| ADM-10-046                | <b>Road Mileage Reports</b><br>Annual account of miles of roads in the township                                                                                                                                                                                                                                                                                         | Permanent                                                                                | Paper                 |                                                         | <input type="checkbox"/>                   |
| ADM-10-047                | <b>Special District Records</b><br>Documents the development and execution of the district including but not limited to studies, contracts, correspondence, and notes, spreadsheets, agreements, affidavits and other documents. (ex. Joint Economic Development District and Tax Increment Financing District)                                                         | Active + 5 years                                                                         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-048                | <b>Studies, Plans, and Reports, Adopted</b><br>Documents prepared in-house or externally regarding regional and local planning, strategic or long-range planning or growth for the township: plans such as comprehensive land use, vision, transportation, economic development, streetscape, corridor, and multi-year plans, etc. (See also WCT-09-065 and WCT-13-114) | 5 years<br>after superseded<br>and no longer of<br>administrative or<br>historical value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-10-049                | <b>Township Name Change</b><br>Official documents and records of steps taken to change name from Union Township to West Chester Township                                                                                                                                                                                                                                | Permanent                                                                                | Paper /<br>Electronic |                                                         | ✓                                          |
| ADM-10-050                | <b>Township, Limited Home Rule</b><br>Documents the enactment of township limited home rule; includes resolution, correspondence and other records                                                                                                                                                                                                                      | Permanent                                                                                | Paper                 |                                                         | ✓                                          |
| ADM-10-051                | <b>Township, Logo and Trademark</b><br>Current and past township logos including copyright information and trademark registration                                                                                                                                                                                                                                       | Permanent                                                                                | Paper                 |                                                         | <input type="checkbox"/>                   |
| ADM-10-052                | <b>Administrator's Report</b><br>Updates prepared by the administrator to advise trustees of current projects and general information; typically includes memo, copies of correspondence for informational purposes, minutes for review, etc.                                                                                                                           | Until no longer of<br>administrative<br>value                                            | Electronic            |                                                         | <input type="checkbox"/>                   |
| ADM-13-053                | <b>Backflow Prevention Device Test Records</b><br>Records relating to backflow preventer testing in township buildings                                                                                                                                                                                                                                                  | 1 year<br>after superseded                                                               | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-13-054                | <b>Bond Issue Documentation</b><br>Documents created for submittal to complete the official statement including correspondence and general documentation (See also ADM-10-004)                                                                                                                                                                                          | Until no longer of<br>administrative<br>value                                            | Paper /<br>electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

**West Chester Township Administration**  
(Revises Administration Schedule approved 05/26/2021)

(local government entity)

(unit)

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|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------|
| ADM-13-055                | <b>Bonds / Oaths Of Officials</b><br>Record of oaths and bonds of township officials;<br>Certificates of oaths                                                                                                                                          | 10 years after<br>termination of<br>office or<br>employment<br>Appraise for<br>historical value | Paper                 |                                                                                                                                                                                       | ✓                                          |
| ADM-13-056                | <b>Conference Room Use Records</b><br>Requests and forms for outside groups using<br>township conference rooms and township hall                                                                                                                        | Until no longer of<br>administrative<br>value                                                   | Paper /<br>Electronic |                                                                                                                                                                                       | <input type="checkbox"/>                   |
| ADM-13-057                | <b>Insurance Policy Renewal Documents</b><br>Working docs, worksheets, correspondence,<br>exposure statements, value statements, invoice,<br>and coverage details (See also ADM-10-022)                                                                 | 1 year<br>after policy issued<br>and no longer of<br>administrative<br>value                    | Paper /<br>Electronic |                                                                                                                                                                                       | <input type="checkbox"/>                   |
| ADM-13-058                | <b>Liquor Permits</b><br>Includes signed applications, correspondence, PD<br>investigation results, etc.                                                                                                                                                | 3 years<br>after action by the<br>board<br>provided audited                                     | Paper /<br>Electronic | Audited means: the years<br>encompassed by the records<br>have been audited by the<br>Auditor of State and the<br>audit report has been<br>released pursuant to<br>Sec. 117.26 O.R.C. | <input type="checkbox"/>                   |
| ADM-13-059                | <b>Minutes (Proceedings of Township Trustees)</b><br>Official record of the proceedings of the trustees                                                                                                                                                 | Permanent                                                                                       | Paper /<br>Electronic |                                                                                                                                                                                       | <input type="checkbox"/>                   |
| ADM-13-060                | <b>Minutes, Drafts (Proceedings of Township Trustees)</b><br>Drafts created for final approval by the Board                                                                                                                                             | After minutes<br>approved and no<br>longer of<br>administrative or<br>historical value          | Paper /<br>Electronic |                                                                                                                                                                                       | <input type="checkbox"/>                   |
| ADM-13-061                | <b>Petitions</b><br>Signed by citizens requesting action by the<br>township. Petitions state the issue of concern and<br>list the names of citizens. Includes petitions of<br>initiative, referendum, recall, vacation of public<br>rights-of-way, etc. | 10 years<br>and no longer of<br>administrative<br>value                                         | Paper /<br>Electronic |                                                                                                                                                                                       | <input type="checkbox"/>                   |
| ADM-13-062                | <b>Property Files, Leases and Agreements</b><br>Documents terms for the use of Township-owned<br>facilities. Includes original executed documents,<br>insurance certificates, annual reports,<br>correspondence, etc.                                   | 5 years<br>after expiration<br>and no longer of<br>administrative<br>value<br>provided audited  | Paper /<br>Electronic |                                                                                                                                                                                       | <input type="checkbox"/>                   |
| ADM-13-063                | <b>Resolutions</b><br>Includes resolution number, reason, date passed,<br>description of action, and action by board                                                                                                                                    | Permanent                                                                                       | Paper                 |                                                                                                                                                                                       | ✓                                          |



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(local government entity)

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| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period                                           | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| ADM-13-064                | <b>Resolutions, Reference and Electronic</b><br>Electronic and other media record kept for<br>reference or convenience                                                                                                                                                                 | 5 years<br>and no longer of<br>administrative or<br>legal value      | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-13-065                | <b>Social Media</b><br>Web-based media services (i.e. Twitter and<br>Facebook) used to post updates of township<br>events and items of interest; archive of postings<br>maintained on the web based media service;<br>comments deleted by policy will be retained via<br>"screen shot" | Until no longer of<br>administrative<br>value                        | Electronic            |                                                         | <input type="checkbox"/>                   |
| ADM-13-066                | <b>Social Media Archive &amp; Deleted Posts</b><br><i>Screen shots of deleted posts or comments.</i>                                                                                                                                                                                   | 1 year<br>after removal                                              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-13-067                | <b>Speeches, Papers and Presentations</b><br>Notes or text of speeches, papers or presentations<br>delivered in conjunction with township work                                                                                                                                         | 2 years                                                              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-13-068                | <b>Storage Tanks, Underground</b>                                                                                                                                                                                                                                                      | 10 years<br>after tank<br>removed                                    | Paper                 |                                                         | <input type="checkbox"/>                   |
| ADM-13-069                | <b>Weather Events</b><br>Records of administration response to severe<br>weather including snow, wind and storms. Includes<br>maps, phone logs, correspondence, etc.                                                                                                                   | 1 year<br>after event and no<br>longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| ADM-13-070                | <b>Website Content</b><br>Information posted to website pages using content<br>management system.                                                                                                                                                                                      | 1 year                                                               | Electronic            |                                                         | <input type="checkbox"/>                   |
| ADM-13-071                | <b>Website-Based Customer Interactions and<br/>Service Requests</b><br>Records maintained on website utilizing internet-<br>based applications                                                                                                                                         | 2 years                                                              | Electronic            |                                                         | <input type="checkbox"/>                   |
| ADM-17-072                | <b>Telephone Logs</b><br>Records of calls to Administration used for<br>convenience to capture phone numbers for call<br>back, to relay messages, requests or concerns,<br>and other notifications and general information                                                             | Until no longer of<br>administrative<br>value                        | Paper /<br>Electronic |                                                         |                                            |



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**West Chester Township Administration**  
(Revises Administration Schedule approved 05/26/2021)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                          | (3)<br>Retention<br>Period                                             | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| ADM-17-073                | <b>Special District Records</b><br>Transmittal letters to and from Township and property owners, unsigned forms, notes, worksheets, obsolete spreadsheets, general correspondence and other documents that do not serve to verify or add value to the files (See ADM 10-047) | 1 year after receipt of Final Determination from Ohio Tax Commissioner | Paper / Electronic   |                                                         |                                            |
| ADM-17-074                | <b>Open Data Platform Content</b><br>Information posted to website pages using content management system                                                                                                                                                                     | Life of the posting on site                                            | Electronic           |                                                         |                                            |
| ADM-17-075                | <b>Open Data Platform-Based Customer Interactions and Service Requests</b><br>Records maintained on website utilizing internet-based applications                                                                                                                            | 2 years                                                                | Electronic           |                                                         |                                            |
| ADM-20-076                | <b>Director Report</b><br>Bi-weekly updates prepared by the department directors to advise Township Administrator of current projects and general information; typically includes summary of activities and projects and supporting documentation                            | Until no longer of administrative value                                | Electronic           |                                                         |                                            |
| ADM-20-077                | <b>Continuous Improvement Process Maps</b><br>Process maps created to document and transform existing and new processes                                                                                                                                                      | 5 years and no longer of administrative value                          | Paper / Electronic   |                                                         |                                            |



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APR 25 2018

# STATE AND LOCAL GOVERNMENT RECORDS

## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

#### Communications and Information Technology

West Chester Township

(Supersedes Information Technology Schedule approved 3/25/2014)

(local government entity)

(unit)

Director, Communications  
and Information Technology

*Dennis Dick*  
(signature of responsible official)

Dennis Dick  
(name)

(title)

3-29-18  
(date)

### Section B: Records Commission

West Chester Township

513-777-5900

Records Commission

(telephone number)

9113 Cincinnati Dayton Road

West Chester

45069

Butler

(address)

(city)

(zip code)

(county)

To have this form returned to the Records Commission electronically, include an email address: [KByrd@WestChesterOH.org](mailto:KByrd@WestChesterOH.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.

Records Commission Chair Signature / *Lee Wong*, President Board of Trustees

4/24/18  
Date

### Section C: Ohio Historical Society - State Archives

*Angie C. Shahan*  
Signature

Govt. Records Archivist  
Title

5/7/18  
Date

### Section D: Auditor of State

*Martin E. Mohr*  
Signature

Records Manager  
Title

5-16-18  
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

West Chester Township

Communications and Information Technology

(Supersedes Information Technology Schedule approved 3/25/2014)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                          | (3)<br>Retention<br>Period                                                                                                          | (4)<br>Media<br>Type     | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------|---------------------------------------------------------|--------------------------------------------|
| IT-12-02                  | Attendance Records (Communications & IT Department)<br>Records for internal department use to track employee off-time for sick, vacation, compensatory, overtime, etc. (convenience & reference copies)<br>Revised 2018                                                                                                                                                                      | 1 year<br>and no longer of<br>administrative<br>value                                                                               | Paper<br>&<br>Electronic |                                                         | <input type="checkbox"/>                   |
| IT-12-02                  | Help Desk Logs and Reports<br>Records documenting requests for technical assistance and responses to these requests as well to collect information on the use of computer equipment for program delivery, security and other purposes. Includes records in "Track-It" program, "Help Desk" voice mail messages, and e-mail transmissions                                                     | Active<br>then until no<br>longer of<br>administrative<br>value                                                                     | Electronic               |                                                         | <input type="checkbox"/>                   |
| IT-12-03                  | Information System Backup Files<br>Copies of master files or databases, application software, logs, directories, and other documentation needed to restore a system in case of a disaster or inadvertent destruction.                                                                                                                                                                        | 1 year after<br>superseded or<br>obsolete                                                                                           | Electronic               |                                                         | <input type="checkbox"/>                   |
| IT-12-04                  | Information System Program Records<br>Documentation pertaining to development, installation, modification, troubleshooting, operation and removal of software from Township computer systems; records required to plan, develop, operate, maintain and use electronic records; system specifications, file specifications, codebooks, record layouts, user guides and output specifications. | Until<br>superseded or<br>no longer<br>needed to<br>retrieve or read<br>data and<br>information that<br>is stored<br>electronically | Electronic<br>& Paper    |                                                         | <input type="checkbox"/>                   |
| IT-12-05                  | Information System Records<br>Records pertaining to the installation and operation of computer systems and software used by the Township.                                                                                                                                                                                                                                                    | Until no longer<br>of<br>administrative<br>value                                                                                    | Electronic               |                                                         | <input type="checkbox"/>                   |
| IT-12-06                  | Information System Security<br>Records documenting security of the Township's computer systems, including employee access requests, passwords, access authorizations and similar documentation.                                                                                                                                                                                              | 3 years after<br>superseded                                                                                                         | Electronic               |                                                         | <input type="checkbox"/>                   |
| IT-12-07                  | Information System Software Management<br>Documentation of the use of software in Township information systems, including records of software purchases, inventories, software and site licensing, copyright compliance and upgrades.                                                                                                                                                        | 1 year<br>after disposal or<br>upgrade of<br>software                                                                               | Electronic               |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Communications and Information Technology

(Supersedes Information Technology Schedule approved 3/25/2014)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                          | (3)<br>Retention<br>Period              | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| IT-12-08                  | Information System Wiring<br>Documentation of the wiring of the Township's computer network system, including blueprints, diagrams and drawings of layout and installations of fiber optics, computer networks, cables, computer equipment connections and similar documentation.                            | Until no longer of administrative value | Electronic & Paper   |                                                         | <input type="checkbox"/>                   |
| IT-12-09                  | Information Systems Equipment Support Records<br>Information on data processing equipment, software, and other products and their vendors. Record of support services provided for specific data processing equipment, including site visit reports, service reports, service histories, and correspondence. | Active + 1 year                         | Electronic & Paper   |                                                         | <input type="checkbox"/>                   |
| IT-12-10                  | Information Systems Usage Reports<br>Records created to monitor computer system and network usage including but not limited to log-in files, system usage files, data entry logs, and records of individual computer program usage.                                                                          | Until no longer of administrative value | Electronic & Paper   |                                                         | <input type="checkbox"/>                   |
| IT-12-11                  | Security Records – Videotapes Township Buildings<br>Video recordings from security cameras in public areas of Township buildings. Security setups vary and recordings may be continuous, stop-frame or random use. In addition to visual feed, videos also show date and time indexing information.          | 30 days                                 | NA                   |                                                         | <input type="checkbox"/>                   |
| IT-12-12                  | Software and Software Manuals                                                                                                                                                                                                                                                                                | 1 year after disposal or upgrade        | Electronic & Paper   |                                                         | <input type="checkbox"/>                   |
| IT-12-13                  | System Acceptance Tests<br>Records of tests conducted by township and vendor's employees to ensure the system meets all specified requirements during implementation.                                                                                                                                        | Life of system                          | Paper                |                                                         | <input type="checkbox"/>                   |
| IT-12-14                  | System Proposal (CAD)<br>Records of Intergraph Public Safety's response to township's request for proposal used to spec out and purchase the CAD/RMS system.                                                                                                                                                 | Life of system                          | Paper                |                                                         | <input type="checkbox"/>                   |
| IT-12-15                  | System Settings<br>Record of modifications to township CAD and RMS systems documenting original settings and changes made to meet township's operational objectives (Includes CAD and I/LEADS)                                                                                                               | Life of system                          | Electronic           |                                                         | <input type="checkbox"/>                   |



Ohio Historical Society  
State Archives of Ohio  
Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

West Chester Township

Communications and Information Technology

(Supersedes Information Technology Schedule approved 3/25/2014)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                  | (3)<br>Retention<br>Period | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| IT-12-16                  | Telephone System<br>Information pertaining to the acquisition, installation and operation of the internal telephone system used in Township buildings and other Township facilities. | Life of system<br>+ 1 year | Paper &<br>Electronic |                                                         | <input type="checkbox"/>                   |
| IT-14-17                  | Computer Hardware<br>Hardware devices used to process or access Criminal Justice Information.                                                                                        | Life of system             | Electronic            |                                                         | <input type="checkbox"/>                   |



## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

#### Common Schedule – All Departments

(Revises Common Schedule approved 05/13/2022)

West Chester Township

(local government entity)

(unit)

  
(signature of responsible official)

Larry D. Burks  
(name)

Township Administrator  
(title)

5/17/2024  
(date)

### Section B: Records Commission

West Chester Township

513-777-5900

Records Commission

(telephone number)

9113 Cincinnati Dayton Road  
(address)

West Chester  
(city)

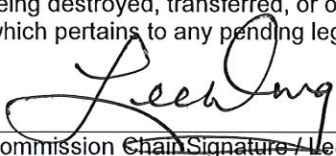
45069  
(zip code)

Butler  
(county)

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

[jwhittaker@westchesteroh.org](mailto:jwhittaker@westchesteroh.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.



05/07/2024

Records Commission Chair Signature / Lee Wong, Chair, Board of Trustees

Date

### Section C: Ohio Historical Society - State Archives

Government Records Archivist

6/13/2024

Signature

Title

Date

### Section D: Auditor of State

Signature

Date

**Please Note: The State Archives retains RC-2 forms permanently.  
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Ohio Historical Society  
State Archives of Ohio  
Local Government Records Program

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Columbus, Ohio 43211-2497

Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments  
(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                       | (3)<br>Retention<br>Period                                                                 | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-001                | <b>Legal Ads</b><br>Proof of publication, including affidavits, provided by newspapers for public hearing notices, resolutions, bid solicitations, and others                                                                                                                                                                                                             | 3 years<br>and no longer of<br>administrative<br>value                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-002                | <b>Agendas – Convenience copies</b><br>Order of items to be discussed at public meetings; includes support docs, item summaries, and rationale for staff recommendations                                                                                                                                                                                                  | Until no longer of<br>administrative<br>value                                              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-003                | <b>Agreements and Contracts</b><br>Records that document some form of agreement that is enforceable by law between the township and other parties, including sponsorships. May include specifications, affidavits of publication, accepted bids, performance bonds, contracts, purchase orders, inspection reports, and correspondence (See also WCT-09-005 & WCT-13-115) | 8 years<br>after expiration of<br>contract (ORC<br>2305.06)                                | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-004                | <b>Awards, Honors, Proclamations</b><br>Presented by public or private sources                                                                                                                                                                                                                                                                                            | 2 years<br>and no longer of<br>administrative or<br>historical value                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-005                | <b>Bid Documentation</b><br>Includes bid requisition/authorizations, invitations to bid or propose, bid specifications, accepted and rejected bids, bid tabulation/evaluations, and estimates (See also WCT-09-003 & WCT-13-115)                                                                                                                                          | 8 years after<br>expiration of<br>contract (ORC<br>2305.06)<br><br>Unsuccessful<br>2 years | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-006                | <b>Budget Preparation Documents</b><br>Used to assist in preparation, review and decision-making processes for department budgets, including reports, instructions, worksheets, spending plans, proposals, financial forecasting and similar records (See also WCT-09-076)                                                                                                | 1 year<br>after adoption of<br>final budget                                                | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-007                | <b>Budget, Preliminary</b><br>Draft version of the budget presented for review prior to formal consideration by the trustees                                                                                                                                                                                                                                              | 1 year<br>after adoption of<br>final budget and<br>no longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Ohio Historical Society  
State Archives of Ohio  
Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
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Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments  
(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                       | (3)<br>Retention<br>Period                                                         | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-008                | <b>Calendars, Appointment and Itinerary Records</b><br>Calendars or documents maintained by staff that record appointments, itineraries, and other activities of officials or employees                                                                                                                                                                                   | Until no longer of administrative value                                            | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-009                | <b>Committee Records</b><br>Records of committees, task forces or other types of groups composed of members of the staff and/or other township entities that are set up for specific purposes (Ex. employee safety committees, teams established to work on township issues, etc.)                                                                                        | 2 years after work of committee concludes, provided records have no enduring value | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-011                | <b>Complaints</b><br>From various sources concerning the township, includes records pertaining to the resolution of the complaint, including anonymous complaints (Does not include complaints received through Website Action Line – See ADM-13-071)                                                                                                                     | 2 years and no action pending                                                      | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-012                | <b>Correspondence, Administrative</b><br>Incoming/outgoing and internal correspondence pertaining to the formulation, planning, interpretation, modification, or redefinition of programs, services, or projects; the governing administrative regulations, policies, and procedures; and expired grant correspondence. Also includes email and FAX (See also WCT-09-029) | 5 years and no longer of administrative or historical value                        | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-013                | <b>Correspondence, Personal</b>                                                                                                                                                                                                                                                                                                                                           | Retention not required                                                             |                      |                                                         | <input type="checkbox"/>                   |
| WCT-09-014                | <b>Correspondence, Routine</b><br>Incoming/outgoing and internal correspondence, in any media, pertaining to or arising from routine operations of policies, programs, services, or projects; includes email and FAX                                                                                                                                                      | 2 years and no longer of administrative value                                      | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-015                | <b>Correspondence, Transitory</b><br>Incoming/outgoing and internal correspondence or memos, in any media pertaining to preliminary or short-term information; includes email and FAX                                                                                                                                                                                     | Until no longer of administrative value                                            | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-016                | <b>Copies &amp; Duplicates</b><br>Reading, informational or reference. Duplicate copies should not be retained longer than the record copy                                                                                                                                                                                                                                | Until no longer of administrative value                                            | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments

(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period                                                    | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-018                | <b>Electronic Mail (Email)</b><br>Includes any attachments and metadata                                                                                                                                                                                                                | Follow the retention schedule for the specific type of record by content      | Electronic           |                                                         | <input type="checkbox"/>                   |
| WCT-09-019                | <b>Electronic Records</b><br>Records created and stored using computer software and technologies                                                                                                                                                                                       | Follow retention schedule for the specific type of record by content          | Electronic           |                                                         | <input type="checkbox"/>                   |
| WCT-09-020                | <b>Emergency Operations, Distributed Copies</b><br>Includes Emergency Operations, Standard Operating Procedures, Functional Annex, etc.                                                                                                                                                | All copies returned to WCFLD for disposition                                  | Paper                |                                                         | <input type="checkbox"/>                   |
| WCT-09-021                | <b>Envelopes</b><br>Envelopes that contained communications received by the township                                                                                                                                                                                                   | Until no longer of administrative value                                       | Paper                |                                                         | <input type="checkbox"/>                   |
| WCT-09-022                | <b>Expense Records</b><br>Records that document travel, mileage, claims for reimbursement and other expenses                                                                                                                                                                           | 2 years provided audited                                                      | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-023                | <b>External Group and Agency Records</b><br>Records provided to the township for courtesy or informational purposes from associations, organizations, groups, and agencies that are not part of the township but which have some form of association or relationship with the township | Until no longer of administrative value                                       | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-024                | <b>Fee and Rate Schedules</b><br>Fee and rates established by the township for various services including permits, cemetery, maps, etc.                                                                                                                                                | Permanently incorporated into trustee minutes<br>Copies kept until superseded | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-025                | <b>Forms – Blank</b><br>Unused forms that are either obsolete or superseded                                                                                                                                                                                                            | Until obsolete or superseded                                                  | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-026                | <b>Fuel Records</b><br>Records pertaining to fuel usage by township vehicles and equipment, including periodic fuel usage reports                                                                                                                                                      | 3 years provided audited                                                      | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-027                | <b>General Subject Files – Administrative</b><br>Records of a general nature that are created or received in the course of administering programs                                                                                                                                      | 1 year and no longer of administrative value                                  | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments

(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                       | (3)<br>Retention<br>Period                                     | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-028                | <b>General Subject Files – Housekeeping</b><br>Records of a general housekeeping nature that are maintained and do not relate directly to the primary program responsibility of the office                                                                | Until no longer of administrative value                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-029                | <b>Grants Awarded</b><br>Includes application, contracts or agreements, and reports, etc. (See also WCT-09-012)                                                                                                                                           | Permanent                                                      | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-030                | <b>Grants Not Awarded</b><br>Documentation of rejection by the grantor, or withdrawal or non-acceptance by the township; includes background, supporting and supplemental information                                                                     | 1 year<br>after rejection or<br>withdrawal<br>provided audited | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-032                | <b>Historical Records</b><br>Narrative of the township, departments and community prepared for reference and informational purposes                                                                                                                       | Permanent                                                      | Paper /<br>Electronic |                                                         | J ✓                                        |
| WCT-09-033                | <b>Incident / Injury Reports, Department Copies</b><br>Records of accidents or injury to persons or property damage ( <i>Originals HR-09-040 &amp; 041; See also ADM-10-021</i> )                                                                         | Until no longer of administrative value                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-034                | <b>Inventory, Department</b><br>Track and control of assets including land and buildings, motor vehicles, furniture, office equipment, computers, fixtures and fittings, machinery and other equipment. ( <i>Final annual inventories in ADM-10-024</i> ) | Until superseded and no longer of administrative value         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-035                | <b>Mailing and Distribution Lists</b><br>Lists of names and addresses compiled for various mailings, such as notifications, community outreach and other administrative purposes                                                                          | Until superseded or obsolete                                   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-036                | <b>Manuals – Vehicles and Equipment</b><br>Manuals provided by the vendor regarding specifications and proper installation, operation and maintenance of vehicles or equipment                                                                            | Life of vehicle or equipment                                   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-037                | <b>Meeting Notification Lists</b><br>Listings kept of persons who have requested advance notification of all meetings or meetings with specific content                                                                                                   | Until updated                                                  | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



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Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments  
(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                          | (3)<br>Retention<br>Period                                                                                                                                       | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-038                | <b>Memberships</b><br>Records of memberships that are paid for by the township for officials, employees or the township as an organization in professional associations and organizations such local, county, state and national professional associations and organizations | 1 year<br>after expired or<br>superseded                                                                                                                         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-040                | <b>Notice of Meetings</b><br>Documentation of compliance with Ohio Public Meeting law ORC 121.22                                                                                                                                                                             | 1 year<br>after meeting                                                                                                                                          | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-041                | <b>Office Equipment Records</b><br>Pertains to acquisition, installation and operation, including copy counts, etc.                                                                                                                                                          | Life of equipment                                                                                                                                                | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-042                | <b>Organizational Charts &amp; Personnel Allocation Charts, Departmental</b><br>Functional charts of positions and personnel holding positions (See also HR-09-055)                                                                                                          | 2 years<br>after revised or<br>rescinded                                                                                                                         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-043                | <b>Performance Evaluation Preparation &amp; Working File</b><br>Documents relating to performance evaluation, day-to-day training, and direct management and supervision of employees (See HR-09-065)                                                                        | 90 days after final<br>decision rendered<br>and no actions or<br>appeals pending                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-044                | <b>Personnel Development File</b><br>Operational copy of employee file kept in individual departments until transferred to HR at end of township employment (See HR-09-067)                                                                                                  | Merge with<br>Personnel File<br>Official Record<br>Destroy duplicate<br>copies securely                                                                          | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-045                | <b>Photographic Records</b><br>Photographs, negatives, prints, digital images, slides, videos and motion pictures                                                                                                                                                            | Permanent                                                                                                                                                        | Multi                 |                                                         | ✓✓                                         |
| WCT-09-046                | <b>Policies, Rules, Guidelines – Final</b><br>Manuals, guidelines, administrative rules, or similar departmental records distributed internally for the use of employees or externally to the public that govern programs, services or projects (See also WCT-09-048)        | 10 years<br>after terminated or<br>superseded<br>provided no longer<br>of historical, legal<br>or administrative<br>value<br>Keep duplicates<br>until superseded | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments

(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                     | (3)<br>Retention<br>Period                                                                  | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-047                | <b>Program Development Records</b><br>Records documenting the formulation and adoption of programs, ongoing or special events, or activities provided by the township as recreational, service, cultural or educational amenities for the community; may include narrative or statistical reports, correspondence, and other supporting documents (See also WCT-09-050) | 5 years after policy or program adopted and no longer of administrative or historical value | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-048                | <b>Policies , Rules, Guidelines – Working Files</b><br>Material used in the development of manuals, guidelines, administrative rules, or similar departmental records (See also WCT-09-046)                                                                                                                                                                             | 1 year after final approval and no longer of administrative value                           | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-049                | <b>Mailing, Postal Records</b><br>Records documenting transactions with the US Postal Service and private carriers. May include: postal meter records, forms, loss reports, and related items (See also WCT-09-057)                                                                                                                                                     | Until no longer of administrative value                                                     | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-050                | <b>Program Records</b><br>Records pertaining to programs, ongoing or special events, or activities held at township facilities and programs provided by the township as recreational, service, cultural or educational amenities for the community (See also WCT-09-047)                                                                                                | 5 years after event and no longer of administrative or historical value                     | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-053                | <b>Publications</b><br>Documents printed or otherwise produced for internal or external distribution, including annual reports, brochures, pamphlets, leaflets, and similar materials printed by or for the township or any of its departments, and made available to the public (See also WCT-13-111)                                                                  | Until superseded and no longer of administrative or historic value                          | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-054                | <b>Purchase Requests &amp; Invoice Records</b><br>Department copies with supporting docs submitted for approval and payment; uploaded items to ERP, cash receipts, purchase/invoice documents, etc.                                                                                                                                                                     | Until no longer of administrative value provided audited                                    | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments  
(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                   | (3)<br>Retention<br>Period                                                    | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-055                | <b>Receipt and Receipt Books</b><br>Cash book showing record of receipts of monies for fees, rentals, registrations, applications, public records, and others ( <i>Does not include cemetery receipt records CS-11-009</i> )                                                                                                                          | 2 years<br>after last entry<br>provided audited                               | Paper                 |                                                         | <input type="checkbox"/>                   |
| WCT-09-056                | <b>Record Finding Aids</b><br>Manual or automated indexes, logs, lists, registers, and other finding aids designed to make it easier to locate pertinent files or information                                                                                                                                                                         | Until no longer of<br>administrative<br>value                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-057                | <b>Mailing Receipts</b><br>Receipts for registered and certified mail, insured mail, special delivery, certificates of mailing, etc. ( <i>See also WCT-09-049</i> )                                                                                                                                                                                   | Attach to copy of<br>mailing                                                  | Paper                 |                                                         | <input type="checkbox"/>                   |
| WCT-09-058                | <b>Record Requests (ORC 149.43)</b><br>Correspondence and documentation relating to requests for public records that are furnished under Ohio Sunshine Laws ( <i>See also WCT-13-113</i> )                                                                                                                                                            | 1 year<br>after request is<br>answered<br>provided audited                    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-059                | <b>Record Retention Schedules and Compliance Certificates (RC1, RC2 &amp; RC3)</b><br>Authorizations for the retention and disposition of records; Includes schedules, disposal requests, disposal receipts, and record disposal logs ( <i>See also WCT-13-112</i> )                                                                                  | Paper<br>permanent<br><br>Electronic<br>until superseded                      | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-062                | <b>Reports – Administrative</b><br>Reports or studies on non-fiscal aspects of programs, services, or projects compiled by personnel, advisory committees, or consultants under contract, and not noted elsewhere in this schedule. Includes management reports, annual reports, planning, daily, monthly, weekly and/or quarterly reports and others | 3 years<br>and no longer of<br>administrative<br>value or historical<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-063                | <b>Scrapbooks</b><br>Record of the township or individual departments which may include photographs, newspaper clippings and other items documenting township activities and actions and the reactions of citizens                                                                                                                                    | Permanent                                                                     | Paper                 |                                                         | ✓                                          |
| WCT-09-064                | <b>Surveys and Questionnaires</b><br>Completed miscellaneous surveys, questionnaires and similar instruments that are routine and are received and completed by the township for return to the originator                                                                                                                                             | 1 year<br>and no longer of<br>administrative<br>value                         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



**Ohio Historical Society**  
 State Archives of Ohio  
 Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township**

**Common Schedule – All Departments**  
 (Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period                                           | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-065                | <b>Reports, Studies, and Surveys – Final</b><br>Non-routine or special surveys completed by township, customer or clients and the statistical data maintained ( <i>See also WCT-13-114</i> )                                                                                                                           | 3 years<br>and no longer of<br>administrative or<br>historical value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-066                | <b>Technical or General Reference Materials</b><br>Copies of articles, periodicals, reports, studies, vendor catalogs and similar materials that are needed for reference and information but are not considered to be part of the department records                                                                  | Until no longer of<br>administrative<br>value                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-067                | <b>Time Worked Records</b><br>Copies of basic time and earnings cards or sheets and work production sheets of individuals where all or part of the employee's earnings are determined, and including requests for sick, vacation, personal and other time off. If applicable, originals sent to payroll for processing | 3 years for paper /<br>life of system for<br>electronic              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-068                | <b>Training and Conference Materials</b><br>Documents and materials collected at seminars, conferences or other training sessions not sponsored by the township                                                                                                                                                        | Until no longer of<br>administrative<br>value                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-069                | <b>Transcriptions</b><br>Transcriptions of voice mail messages, taped interviews and others used to record events and no action taken and not part of another record series                                                                                                                                            | Until no longer of<br>administrative<br>value                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-070                | <b>Transient Material</b><br>Includes notes and post-it notes, transmittals, memos, phone messages, drafts and other limited documents which serve to convey information of temporary importance                                                                                                                       | Until no longer of<br>administrative<br>value                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-071                | <b>Mailings, Undeliverable</b><br>Mailings sent by the township that were returned as undeliverable                                                                                                                                                                                                                    | 1 year<br>after matter<br>referenced in<br>mailing is<br>concluded   | Paper                 |                                                         | <input type="checkbox"/>                   |
| WCT-09-072                | <b>Vehicle Maintenance Records</b>                                                                                                                                                                                                                                                                                     | Until vehicle is<br>sold or disposed                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-09-073                | <b>Visitor Log</b><br>Visitors in buildings and/or office areas. May include name, date and time checked in and out, and reason for visit                                                                                                                                                                              | 1 year<br>after last entry in<br>calendar year                       | Paper                 |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments  
(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                       | (3)<br>Retention<br>Period                                                                  | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-09-074                | <b>Warranties</b><br>Records of manufacturer's warranties and guarantees relating to operation or replacement of vehicles, equipment or components                                                                                                                                                                                        | Life of equipment or expiration of warranty + 1 year                                        | Paper                |                                                         | <input type="checkbox"/>                   |
| WCT-09-075                | <b>Work Orders, Routine</b><br>Documentation of requests and authorizations for routine work such as assistance in moving furniture, boxes, etc.                                                                                                                                                                                          | Until no longer of administrative or fiscal value                                           | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-076                | <b>Worksheets, Financial</b><br>Rough notes, calculations or drafts assembled or created and used to prepare or analyze other documents; spreadsheets, worksheets, preparatory notes, tentative financial estimates and projections, and other documentation of a preliminary or deliberative and transitory nature (See also WCT-09-006) | Until no longer of administrative value                                                     | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-077                | <b>Worksheets and Drafts</b><br>Records created in drafting documents such as contracts, agreements, fee schedules, forms, reports, surveys, lease docs, easements, resolutions, presentations, applications, etc.                                                                                                                        | 1 year after document is finalized or no longer of administrative value, whichever is later | All media            |                                                         | <input type="checkbox"/>                   |
| WCT-09-078                | <b>Catalogs, trade journals and other printed materials</b> received from other offices, commercial firms or private institutions, which require no action and are not needed for documentary purposes                                                                                                                                    | Until no longer of administrative value                                                     | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-09-088                | <b>Voice Mail Messages</b>                                                                                                                                                                                                                                                                                                                | 10 days or no longer of administrative value                                                | Electronic           |                                                         | <input type="checkbox"/>                   |
| WCT-11-090                | <b>Liability Waivers</b><br>Forms signed by program participants to release the township from any liability related to various activities                                                                                                                                                                                                 | 3 years and no action pending                                                               | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| WCT-11-091                | <b>Licenses Issued to Township</b><br>Licenses and supporting documentation for licenses issued to township departments by other entities as evidence that the township is allowed to undertake some type of activity for which a license is required                                                                                     | 2 years after expired or superseded                                                         | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments  
(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                       | (3)<br>Retention<br>Period                                                                                                                 | (4)<br>Media<br>Type      | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-11-092                | <b>Recordings – Dispatch Radio (911) and Recorded Phones</b><br>Law enforcement, fire, and medical emergency radio transmissions; phone calls to or from township phones attached to recording devices                                    | 1 year                                                                                                                                     | Electronic                |                                                         | <input type="checkbox"/>                   |
| WCT-11-093                | <b>Security – Building Access Levels</b><br>Lists and logs showing assigned levels of access for employees, visitors and vendors in township buildings and facilities                                                                     | Until superseded and no longer of administrative value                                                                                     | Electronic / Paper        |                                                         | <input type="checkbox"/>                   |
| WCT-11-094                | <b>Security – Building Access System</b><br>Records generated by automated systems to show entry and exit from secured areas by authorized persons using an electronic badge or similar system to gain entry or exit; setting door timers | Life of the current system                                                                                                                 | Electronic / Paper        |                                                         | <input type="checkbox"/>                   |
| WCT-11-095                | <b>Security Access Records</b><br>Records relating to the issuance of keys, proximity cards, identification cards, building passes, passwords, etc. to individual employees, contractors, and visitors.                                   | 2 years after superseded, expired or terminated                                                                                            | Card / Electronic / Paper |                                                         | <input type="checkbox"/>                   |
| WCT-11-097                | <b>Videos, Surveillance</b><br>Video recordings from security cameras in public areas of township buildings including interior and exterior video                                                                                         | 30 days provided that any pertinent recordings are retained until final resolution of any related potential or pending claim or litigation | Electronic                |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments

(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                        | (3)<br>Retention<br>Period                                                                                                                                                              | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-11-098                | <b>Video / Audio Recordings</b><br>Relating to interviews, investigations, prisoner processing, etc.                                                                                                                       | 30 days<br>except that<br>portions of<br>recordings relating<br>to specific cases<br>may be captured<br>separately and<br>retained as part of<br>and for the life of<br>the case record | Electronic            |                                                         | <input type="checkbox"/>                   |
| WCT-13-102                | <b>Equipment Maintenance Records</b><br>Documents outlining the acquisition and maintenance history including calibration and inspection reports                                                                           | Life of equipment                                                                                                                                                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-104                | <b>Leases or Rental Agreement Records</b><br>For equipment, machinery, vehicles, office equipment, etc. Includes supporting docs and insurance                                                                             | 1 year<br>after expiration<br>and no longer of<br>administrative<br>value                                                                                                               | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-105                | <b>Meeting Audio or Video</b><br>Audio or videotapes of open meetings of boards, commissions, committees, used to prepare transcripts and for cablecast                                                                    | 2 years<br>after approval of<br>written minutes<br>and no longer of<br>administrative<br>value                                                                                          | Electronic /<br>DVD   |                                                         | <input type="checkbox"/>                   |
| WCT-13-106                | <b>Meeting Notes</b><br>Notes taken during open meetings of boards, commissions, committees from which written minutes are prepared                                                                                        | After approval of<br>written minutes<br>and no longer of<br>administrative<br>value                                                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-107                | <b>Meeting Supporting Documentation</b><br>Documents submitted at meetings of boards, commissions, committees including exhibit items, documentation for agenda items, etc. Includes documents sent in advance of meetings | 1 year<br>after approval of<br>written minutes<br>and no longer of<br>administrative<br>value                                                                                           | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Common Schedule – All Departments

(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                              | (3)<br>Retention<br>Period                                                                           | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-13-108                | <b>Performance Measures Documentation</b><br>Records needed for the documentation of output, outcome, and efficiency for departmental performance measures                                                                                       | 2 years<br>and no longer of<br>administrative<br>value                                               | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-109                | <b>Performance Measures Reports</b><br>Departmental performance measures submitted to administration                                                                                                                                             | 10 years<br>and no longer of<br>administrative<br>value                                              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-110                | <b>Proclamations</b><br>Special recognitions of events and/or persons issued by the Board of Trustees                                                                                                                                            | 1 year<br>after recorded in<br>minutes,<br>superseded, or no<br>longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-111                | <b>Publication Development Records</b><br>Background material, copy (drafts), digital media, etc. including all work performed both inside and outside the township (See also WCT-09-053)                                                        | Until no longer of<br>administrative<br>value                                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-112                | <b>Record Disposal Log</b><br>Logs or similar records listing records destroyed or transferred to the Historical Society showing records series title, dates of records, and date destroyed or transferred (RC-3 or other) (See also WCT-09-059) | Permanent                                                                                            | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-113                | <b>Record Request Log</b><br>List of responses to public records requests as required by Ohio Auditor (See also WCT-09-058)                                                                                                                      | Continually<br>updated                                                                               | Paper/<br>Electronic  |                                                         | <input type="checkbox"/>                   |
| WCT-13-114                | <b>Reports, Studies, and Surveys – Raw Data</b><br>Information or data collected and compiled for the purpose of producing final product (See also WCT-09-065)                                                                                   | Until no longer of<br>administrative<br>value                                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-115                | <b>RFP/RFQ Documentation</b><br>Requests for proposal or request for qualifications Includes submittals and supporting documents (See also WCT-09-003 & WCT-09-005)                                                                              | Accepted<br>retain with<br>contract<br>Rejected<br>3 years after<br>letting of contract              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| WCT-13-116                | <b>Surplus Property Disposition Records</b><br>Records of disposal of surplus property (non-real estate) and unclaimed, abandoned or confiscated property (See also CS-11-028)                                                                   | 2 years<br>after disposition<br>provided audited                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



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**Section E: Records Retention Schedule**

**West Chester Township**

**Common Schedule – All Departments**

(Revises Common Schedule approved 05/13/2022)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                       | (3)<br>Retention<br>Period                            | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------|-------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| WCT-15-117                | <i>Sign In Sheets</i><br>Public meetings, training class, seminars, and others, used to record attendance | Until no longer of administrative or historical value | Paper                |                                                         | <input type="checkbox"/>                   |

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 O.R.C.



Ohio Historical Society  
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APR 19 2017

STATE AND LOCAL  
GOVERNMENT RECORDS

# RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

## Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

**West Chester Township**

(local government entity)

**Community Development**

(Supersedes Community Development schedule approved 4/9/2013)

(unit)

*[Signature]*

(signature of responsible official)

**Aaron Wiegand**

(name)

**Director, Community  
Development**

(title)

**3/22/17**

(date)

## Section B: Records Commission

**West Chester Township**

Records Commission

**513-777-5900**

(telephone number)

**9113 Cincinnati Dayton Road**

(address)

**West Chester**

(city)

**45069**

(zip code)

**Butler**

(county)

To have this form returned to the Records Commission electronically, include an email address: **ptiffany@westchesteroh.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 / Mark Welch, President, Board of  
Trustees

**4-11-17**  
Date

## Section C: Ohio Historical Society - State Archives

*[Signature]* **Amanda D Rindler** **Local Government Records Archivist** **5/2/17**  
Signature Title Date

## Section D: Auditor of State

*[Signature]* **Martin E. Mue** **5-8-17**  
Signature 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**



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Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township**

**Community Development**

(Supersedes Community Development schedule approved 4/9/2013)

| (local government entity) |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | (unit)                                                                                                      |                      |                                                         |                                               |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------|-----------------------------------------------|
| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period                                                                                  | (4)<br>Media<br>Type | (5)<br>For Use by<br>Auditor of<br>State or<br>OHS/ICRP | (6)<br>Records<br>Required<br>by OHS/<br>ICRP |
| CD-10-001                 | <b>Business Info Files</b><br>Information on each individual business operating in West Chester                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Until no longer of administrative value                                                                     | Paper / Electronic   |                                                         | <input type="checkbox"/>                      |
| CD-10-002                 | <b>Case Files, Board of Zoning Appeals, Zoning Commission, Land Use Planning Commission, Olde West Chester Architectural Advisory, Enterprise Zone, Development Council, Connections Committee</b><br>Records pertaining to cases or appeals heard by the listed boards or similar boards charged with interpreting township code or policy decisions                                                                                                                                                                                                                                                                                                                                  | Permanent<br>Approved / Active<br><br>6 years<br>Denied/<br>Superseded/<br>Withdrawn                        | Paper / Electronic   |                                                         | <input type="checkbox"/>                      |
| CD-10-003                 | <b>Case Files, Civil</b><br>Civil case files documenting pending and closed cases filed by the Township, including legal documents, notes, reports, background material, settlement records and other documentation created in handling of claims and legal disputes and civil actions between the Township and other parties. These records will include documentation such as complaints, summonses, investigations, reports, attorney's notes, photographs, orders and judgments, dispositions, pleadings and related records. Litigation records include any court decisions affecting the Township, court proceedings, research files of legal counsel, and litigation case files | 7 years<br>after case closed,<br>dismissed or date<br>of last action<br>unless there is<br>historical value | Paper                |                                                         | <input type="checkbox"/>                      |
| CD-10-004                 | <b>Census Information</b><br>Correspondence regarding Census                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Until no longer of administrative value                                                                     | Paper                |                                                         | <input type="checkbox"/>                      |
| CD-10-005                 | <b>Development Council Annual Reports</b><br>Documents containing reports of annual date including new projects, growth, investment and summary date                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 10 years                                                                                                    | Paper / Electronic   |                                                         |                                               |
| CD-10-006                 | <b>Development Council Audits</b><br>Professionally audited financial reports/records                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | 5 years<br>(now audited as township agency)                                                                 | Paper                |                                                         | <input type="checkbox"/>                      |
| CD-10-007                 | <b>Development Council Fiscal Records</b><br>Quarterly financial statements, records, and reports including accounts payable and receivable                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | 5 years                                                                                                     | Paper                |                                                         | <input type="checkbox"/>                      |
| CD-10-008                 | <b>Development Council Projects/Prospect Files</b><br>Information regarding meetings or visits with companies who might locate in township                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | 5 years                                                                                                     | Paper                |                                                         | <input type="checkbox"/>                      |
| CD-10-009                 | <b>Development Council Vendor Records</b><br>Files on each vendor utilized with copies of expenditures                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | 4 years<br>after last entry<br>provided audited                                                             | Paper                |                                                         | <input type="checkbox"/>                      |



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**Section E: Records Retention Schedule**

**West Chester Township**

**Community Development**

(Supersedes Community Development schedule approved 4/9/2013)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                               | (3)<br>Retention<br>Period                                                                                         | (4)<br>Media<br>Type                          | (5)<br>Excluded by<br>Authority of<br>State of<br>OHSLGRP | (6)<br>Required<br>by OHSLGRP |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|-----------------------------------------------------------|-------------------------------|
| CD-10-010                 | <b>Enterprise Zone Administration</b><br>Detailed records for all of Enterprise Zone programs, forms, and reports                                                                                                                                                                                 | Approved<br>Active + 5 years<br>after abatement<br>ends<br>Denied<br>Until no longer of<br>administrative<br>value | Paper /<br>Electronic                         |                                                           | <input type="checkbox"/>      |
| CD-10-011                 | <b>Enterprise Zone Agreements</b><br>Case materials                                                                                                                                                                                                                                               | Approved<br>Active + 10 Years<br>Not approved<br>5 years after<br>determination                                    | Paper                                         |                                                           | <input type="checkbox"/>      |
| CD-10-012                 | <b>Minutes and Supporting Documentation</b><br>The official record of proceedings of regular special and emergency meetings; includes Board of Zoning Appeals, Zoning Commission, Land Use Planning Committee, Development Council, Zoning Resolution Review Committee and others                 | Permanent                                                                                                          | Paper /<br>Electronic<br>(audio and<br>video) |                                                           | ✓                             |
| CD-10-013                 | <b>Opinions, Advisory/Legal</b><br>Formal opinions written by legal counsel to advise the Township, the governing body or the Township staff regarding the legality or possible legal consequences of various courses of action and to present the basis and rationale for legal recommendations. | Permanent                                                                                                          | Paper /<br>Electronic                         |                                                           | ✓                             |
| CD-10-015                 | <b>Plat, Record</b><br>Recorded subdivision plat                                                                                                                                                                                                                                                  | Permanent                                                                                                          | Paper /<br>Electronic                         |                                                           | ✓                             |
| CD-10-016                 | <b>Plats, Lot Split</b><br>Draft Subdivision review plat                                                                                                                                                                                                                                          | Until no longer of<br>administrative<br>value                                                                      | Paper                                         |                                                           | <input type="checkbox"/>      |
| CD-10-017                 | <b>Plats, Subdivision Review</b><br>Draft Subdivision review plat                                                                                                                                                                                                                                 | Until no longer of<br>administrative<br>value                                                                      | Paper                                         |                                                           | <input type="checkbox"/>      |
| CD-10-018                 | <b>Property Maintenance Violations</b><br>Documentation of violations of property maintenance and other uniform codes.                                                                                                                                                                            | Permanent                                                                                                          | Electronic                                    |                                                           | <input type="checkbox"/>      |
| CD-10-019                 | <b>Property Maintenance Violations</b><br>Documentation of violations of property maintenance and other uniform codes.                                                                                                                                                                            | 5 years provided<br>no action pending                                                                              | Paper                                         |                                                           | <input type="checkbox"/>      |
| CD-10-020                 | <b>Property Profiles/ Brochures</b><br>Available land and building property reports and plans                                                                                                                                                                                                     | Until superseded,<br>revised or<br>replaced                                                                        | Paper                                         |                                                           | <input type="checkbox"/>      |



Section E: Records Retention Schedule

West Chester Township

Community Development

(Supersedes Community Development schedule approved 4/9/2013)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                      | (3)<br>Retention<br>Period                                                               | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS/LGRP | (6)<br>RC-3<br>Required<br>by OHS/<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| CD-10-022                 | <b>Studies, Plans and Reports</b><br>Documents prepared by the township or by external entities on behalf of the township. Including feasibility studies, planning and land use studies, capital projects reports, transportation system plans, master street plans and other similar documents that have long term reference or historical value.                       | Until no longer of administrative value unless of historical significance then Permanent | Paper / Electronic   |                                                         | <input checked="" type="checkbox"/>        |
| CD-10-023                 | <b>Tax Incentive Review Committee</b><br>Records of annual compliance reviews related to the Enterprise Zone Program                                                                                                                                                                                                                                                     | 5 years after agreement ends                                                             | Paper / Electronic   |                                                         | <input type="checkbox"/>                   |
| CD-10-024                 | <b>Zoning Application Ledger</b><br>List that is kept to record all Zoning Certificate applications received in this office and assign numbers                                                                                                                                                                                                                           | Until no longer of administrative value                                                  | Paper                |                                                         | <input type="checkbox"/>                   |
| CD-10-025                 | <b>Zoning Applications/ Certificates, including Finals</b><br>Blueprints and specifications submitted for Township review as supporting documentation by building contractors or owners when applying for a Zoning Certificate                                                                                                                                           | Permanent                                                                                | Electronic           |                                                         | <input checked="" type="checkbox"/>        |
| CD-10-026                 | <b>Zoning Applications/ Certificates, including Finals</b><br>Blueprints and specifications submitted for Township review as supporting documentation by building contractors or owners when applying for a Zoning Certificate                                                                                                                                           | 3 years after scanned to electronic retention                                            | Paper                |                                                         | <input type="checkbox"/>                   |
| CD-10-029                 | <b>Zoning Map Archive</b><br>Historical representation of Zoning Maps from 1989 to present                                                                                                                                                                                                                                                                               | Permanent                                                                                | Paper / Electronic   |                                                         | <input checked="" type="checkbox"/>        |
| CD-10-030                 | <b>Zoning Permit Database</b><br>All application information including graphics for the review of Zoning Certificates                                                                                                                                                                                                                                                    | Permanent                                                                                | Electronic           |                                                         | <input checked="" type="checkbox"/>        |
| CD-11-031                 | <b>Data Documentation – Condensed (Temporary) Metadata</b><br>Temporary generic information that provides a dataset list (Word document) and basic information about datasets, pending the storage of "real" metadata with datasets on the GIS; includes dataset name, definitions and descriptions, data locations, significant items in attribute (tabular) data, etc. | Until no longer of administrative value                                                  | Electronic           |                                                         | <input type="checkbox"/>                   |



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West Chester Township

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|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|----------------------|---------------------------------------------------------|-------------------------------------------|
| CD-11-032                 | <b>Data Documentation and Metadata</b><br>Records created during development or modification of an automated system, which are necessary to access, retrieve, manipulate and interpret data in that system and records that explain the meaning, purpose, structure, logical relationships and origin of the data elements. Data documentation includes data dictionaries (containing information about data layers, format and other documentation), file layouts, code books or tables, definition files and information regarding the retention period for the data and associated data documentation as well as information regarding the frequency of historical snapshots of the data and data documentation. Data documentation includes metadata (data about the data), i.e. the description of the data resources, its characteristics, location, usage, etc. Metadata is used to identify, describe and define user data. | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                  |
| CD-11-033                 | <b>Data Documentation and Metadata – Permanent GIS Records</b><br>This retention schedule applies only to documentation relating to databases containing permanent information.<br><b>Important Note: Permanent data and its associated metadata and data documentation is retained permanently only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot. See also Datasets and Data Files.</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                  |
| CD-11-034                 | <b>Datasets – Aerial Photograph and Image</b><br>Photographs and digital images of the earth that have been taken from airborne vehicles to evaluate, measure or map selected features of the landscape.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                  |
| CD-11-035                 | <b>Datasets – Base</b><br>Core data working files that are sets of information providing a background orientation for another layer of primary focus. Examples: ground and water features (roads, streams, lakes, canals, railroads, etc.) and parcels, addresses, quarter sections, etc.<br><b>Important Note: The data is retained only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                  |



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**Section E: Records Retention Schedule**

**West Chester Township**

**Community Development**

(Supersedes Community Development schedule approved 4/9/2013)

(local government entity)

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| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period              | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| CD-11-036                 | <b>Datasets – Facilities</b><br>Community facilities locations, Township buildings and facilities, natural areas, parks, protective services facilities, public art locations, school locations, trails, pedestrian and bicycle trails, etc. <b>Important Note: The data is retained only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot</b>                                                                                                                                                                                                                                                                                                                                                                                                       | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                   |
| CD-11-037                 | <b>Datasets – Township Jurisdictional Boundary</b><br>Township limits, election boundary maps, boundary maps of political subdivisions and taxing districts, enterprise zones, historic districts, protective services patrol and enforcement areas, school district boundaries, urban growth area maps, zip code boundaries, other Township, etc. <b>Important Note: The data is retained only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot</b>                                                                                                                                                                                                                                                                                                 | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                   |
| CD-11-038                 | <b>Datasets and Data Files –</b><br>A <i>dataset</i> is group of related records that are organized and treated as a unit or any set of data that has a common theme or similar attributes. The term is used interchangeably with the term <i>data file</i> . Datasets are part of the GIS database. A data layer refers to a conceptual grouping of data that share common characteristics, such as a layer composed of base or thematic data, e.g. roads (base) or wildlife habitat (thematic). Geographic data combines and links graphic representations of features or events found on the earth with corresponding tabular (attribute) data. <b>Important Note: The data is retained only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot</b> | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                   |
| CD-11-039                 | <b>Datasets and Data Files – Temporary County Datasets</b><br>GIS data layers containing property or land ownership information obtained from the County Auditor. <b>Important Note: The data is retained only in its most updated form unless the dataset is to be captured at specific points in time via a historical snapshot</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                   |



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**West Chester Township**

**Community Development**

(Supersedes Community Development schedule approved 4/9/2013)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period              | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| CD-11-040                 | <b>GIS – Historical Snapshots</b><br>Historical snapshots (electronic format) retained for historical and reference purposes containing all GIS data layers and associated attribute files, GIS user production areas.                                                                                                                                                                                                 | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                   |
| CD-11-041                 | <b>GIS – Externally Acquired Source Material</b><br>Replicate Source Data. Raw data or documents or "source records" containing images and/or data provided to GIS in hard copy, microform, or electronic format. Note: Metadata should include information regarding the source of the data.                                                                                                                          | Until no longer of administrative value | Electronic & Paper   |                                                         | <input type="checkbox"/>                   |
| CD-11-042                 | <b>GIS – Internally Acquired Source Material</b><br>Replicate Source Data. Raw data or documents or "source records" containing images and/or data provided to GIS in hard copy, microform, or electronic format. Note: Metadata should include information regarding the source of the data.                                                                                                                          | Until no longer of administrative value | Electronic & Paper   |                                                         | <input type="checkbox"/>                   |
| CD-11-043                 | <b>GIS – Policy Documentation</b><br>Records of GIS policies including those covering access and security, systems development, data retention and disposition, data distribution, rules governing issuance of data, and data ownership, etc.                                                                                                                                                                          | Until superseded                        | Electronic           |                                                         | <input type="checkbox"/>                   |
| CD-11-044                 | <b>GIS – Surveying Source Data</b><br>Township surveyor reports and field notes from property surveys used to identify monuments, landmarks, buildings, etc. Engineering control and survey point data. Legal descriptions developed from surveys and surveying data returned from field instruments including horizontal angles, slope distance, horizontal distance, zenith angles, sun observations, drawings, etc. | Until no longer of administrative value | Electronic           |                                                         | <input type="checkbox"/>                   |
| CD-11-045                 | <b>GIS Records</b><br>Geospatial data that is used to describe a particular location, area or feature. Records include software, input (including electronic source data and data from source documents), data in electronic format, output to paper, disk, or other storage medium generated by the system, and documentation needed to facilitate human understanding of the system.                                 | See individual GIS series for retention | Electronic           |                                                         | <input type="checkbox"/>                   |



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West Chester Township

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(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | (3)<br>Retention<br>Period              | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| CD-11-046                 | <b>Maps And Drawings</b><br>Wide range of maps, drawings, architectural, cartographic and engineering records, including maps, charts, photomaps, field survey notes, map history case files and map and drawing finding aids; graphic representations at reduced scale of selected physical and cultural features of the surface of the earth; architectural and engineering drawings depicting concepts and precise measurements needed to plan and build static structures, such as buildings, bridges and streets; design and construction drawings for major Township projects; maps and drawings stored and generated by GIS and computer-aided design (CAD) systems; "as built" drawings of Township facilities; annexation and development plats and plans; various construction drawings and renderings; Township boundary maps, election precinct and ward or district maps, zoning district maps; USGS topographical maps of the area; and other similar documents. | Until no longer of administrative value | Paper                 |                                                         | <input checked="" type="checkbox"/>        |
| CD-11-047                 | <b>Symbol Datasets</b><br>Township logo, highway marker symbols, parking lot symbols and similar mapping symbols used for printing purposes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Until superseded                        | Electronic            |                                                         | <input type="checkbox"/>                   |
| CD-13-048                 | <b>Public Nuisance Properties</b><br>Documentation of Nuisance Declaration; including legal ads, Trustee minutes, invoices for clean-up fees, certifications of assessments to the Butler County Auditor's Office (also formerly part of FIN-10-040 "Weed Complaints")                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | 5 years                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |





Section E: Records Retention Schedule

**West Chester Township**

**Fire Department – (Revises schedule approved 04/06/2019)**

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                               | (3)<br>Retention Per                                   | (4)<br>Media<br>Type      | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|---------------------------|---------------------------------------------------------|--------------------------------------------|
| FD-10-001                 | <b>Apparatus Checklist</b><br>Daily & monthly checks. Contains name of item, condition of item, location, and when last inspected.                                                                                                                                                                                                                                                                                                | 1 year<br>after revised                                | Electronic<br>(Rev. 2015) |                                                         | <input type="checkbox"/>                   |
| FD-10-002                 | <b>Arson Files</b><br>Electronic files of arson investigation (Include paper copy in permanent file)                                                                                                                                                                                                                                                                                                                              | 3 years<br>after incident                              | Paper/<br>Electronic      |                                                         | <input type="checkbox"/>                   |
| FD-10-003                 | <b>Arson Files</b><br>Records of arson investigation.                                                                                                                                                                                                                                                                                                                                                                             | Permanent                                              | Paper                     |                                                         | X <input checked="" type="checkbox"/>      |
| FD-10-004                 | <b>Check Sheets, EMS Equipment &amp; Medic Unit</b><br>Includes Airway bag, Trauma bag, IV/IO KITS, Suction Unit, Cardiac monitor, Children's Pediatric kit; inventory, disinfection, daily check                                                                                                                                                                                                                                 | 6 months<br>after revised                              | Paper/<br>Electronic      |                                                         | <input type="checkbox"/>                   |
| FD-10-005                 | <b>Civilian Casualty Report</b><br>Contains name, address, date, degree of injury, disposition and officer in charge                                                                                                                                                                                                                                                                                                              | Permanent                                              | Electronic                |                                                         | X <input checked="" type="checkbox"/>      |
| FD-10-006                 | <b>Eligibility Lists</b><br>A list of applicants who have passed all parts of the examination and can be considered for employment based on their scores                                                                                                                                                                                                                                                                          | Until eligibility<br>expires and/or list<br>is revised | Paper/<br>Electronic      |                                                         | <input type="checkbox"/>                   |
| FD-10-007                 | <b>EMS Reports – ePCR</b><br>Contains location, date, time, patient information, disposition, nature of injury, medic sent, and time returned                                                                                                                                                                                                                                                                                     | Permanent<br>Life of database<br>then migrate          | Electronic                |                                                         | <input type="checkbox"/>                   |
| FD-10-008                 | <b>EMS Reports – Paper</b><br>Contains location, date, time, patient information, disposition, nature of injury, medic sent, and time returned. May include copies of ECG interpretations and transfer paperwork from pick-up location.                                                                                                                                                                                           | 5 years<br>providing no<br>action pending              | Electronic                |                                                         | <input type="checkbox"/>                   |
| FD-10-009                 | <b>Equipment Maintenance</b><br>Records pertaining to maintenance and calibration of equipment. Includes Thermal Imaging Cameras, multi gas detectors and other specialized equipment                                                                                                                                                                                                                                             | 1 year<br>after disposition of<br>equipment            | Paper/<br>Electronic      |                                                         | <input type="checkbox"/>                   |
| FD-10-010                 | <b>Fire Code Board of Appeals</b>                                                                                                                                                                                                                                                                                                                                                                                                 | Removed 2024 –<br>not a township<br>board              |                           |                                                         | X No RC-3<br>for LGRP                      |
| FD-10-011                 | <b>Fire Inspection Records</b><br>Inspection records include but not limited to address, date, inspector, violations, findings and suggestions. Violation Notices include violation, time allowed to correct, re-inspection date, and inspector. Plan review includes blueprints and specifications, Zoning Amendments, Conditional Use, Knox Box form; Sprinkler and fire alarm applications; back flow testing results; Phase 1 | 3 Years                                                | Paper/<br>Electronic      |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

**West Chester Township**

**Fire Department – (Revises schedule approved 04/06/2019)**

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                        | (3)<br>Retention Per                                                 | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
|                           | Environmental assessments, S.A.R.A. reports, MSDS sheets, hazmat incidents                                                                                                                                                                                                                 |                                                                      |                      |                                                         |                                            |
| FD-10-012                 | <b>Fire Investigation Files</b><br>Contains date of fire, address, correspondence, investigation and personnel involved. Arson investigation paperwork                                                                                                                                     | Permanent                                                            | Paper/<br>Electronic |                                                         | X ✓                                        |
| FD-10-013                 | <b>Firework Permits</b><br>Filed in inspection files: Permit, insurance, application, MSDS, safety checklist, description of display, investigation paperwork, payroll records for coverage of fireworks. Explosives Permits copies from Fire Marshalls office                             | 1 year                                                               | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-10-014                 | <b>HazMat – Toxic Sites (Designated)</b><br>Records related to the identification and designation of a site that may have toxic materials contaminating it                                                                                                                                 | Permanent                                                            | Paper/<br>Electronic |                                                         | X ✓                                        |
| FD-10-015                 | <b>HIPAA Authorizations for Release of Information</b><br>EMS patient authorizations for release or amendment of information                                                                                                                                                               | 5 years<br>from record<br>creation date<br>(Rev. 2015)               | Electronic           |                                                         | <input type="checkbox"/>                   |
| FD-10-016                 | <b>Hydrant Maintenance / Inspection Records</b><br>Documentation of locations, specifications, maintenance, testing and repair of water hydrants in the Township water system                                                                                                              | 1 year<br>after hydrant is<br>replaced or<br>removed from<br>service | Paper/<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FD-10-017                 | <b>ISO Record – Insurance Service Office</b><br>Letter issued by the ISO to the fire department indicating the rating for WCT                                                                                                                                                              | 3 years<br>after superseded                                          | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-10-019                 | <b>Licenses and Permits</b><br>License issued to the fire department as evidence that the FD is permitted to undertake some type of activity for which a license is required, including licenses issued by the state of Ohio Pharmacy Board for EMS medications used and kept in inventory | 2 years<br>after expiration or<br>superseded                         | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-10-020                 | <b>Material Safety Data Sheets (MSDS)</b><br>Data sheets of all chemicals used by the West Chester Fire Department [29 CFR 1910.1200]                                                                                                                                                      | Active + 30 years                                                    | Paper                |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

**West Chester Township**

**Fire Department – (Revises schedule approved 04/06/2019)**

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                          | (3)<br>Retention Per                                 | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| FD-10-021                 | <b>Medic Bag Inventory/ Controlled Substance Log</b><br>Includes contents of medic bags to include equipment and medications. CSL specific tracking and accounting for controlled substances                                                 | 6 months after revised                               | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-10-022                 | <b>S.A.R.A. Tier II Reports</b><br>Superfund Amendments Reauthorization Act reports – included in Fire Inspection reports                                                                                                                    | 3 Years                                              | Paper/<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FD-10-023                 | <b>Shift Log – Paper</b><br>Records of personnel dates & times worked. Tracks hours to be paid, holiday, sick days, trades etc.                                                                                                              | 5 years                                              | Electronic           |                                                         | <input type="checkbox"/>                   |
| FD-10-024                 | <b>Statistical Records</b><br>Fire Dept. statistics regarding the extent of fires and the damage caused by fires                                                                                                                             | Permanent                                            | Paper/<br>Electronic |                                                         | X <input checked="" type="checkbox"/>      |
| FD-10-025                 | <b>Training Materials for Public Education</b><br>Manuals, handbooks, brochures, flyers, pamphlets, notices, and similar documentation of training provided to the public. Includes public education detail schedules and information sheets | Until superseded                                     | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-10-026                 | <b>Training Materials for Employees</b><br>Manuals, handbooks, notices, videos and similar documentation of training provided to employees                                                                                                   | Until superseded                                     | Paper/<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FD-10-027                 | <b>Training Records – Paper</b><br>Records include lesson plan, attendance and evaluation records, and summaries                                                                                                                             | 3 years<br>after recorded in<br>Fire RMS             | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-10-028                 | <b>Training Records – Fire RMS Database</b><br>Documents training history of individual employees who have participated in training and staff development programs; includes lesson plan, attendance, evaluations and summaries              | 10 years<br>or life of database,<br>then migrate     | Electronic           |                                                         | <input type="checkbox"/>                   |
| FD-10-029                 | <b>Vehicle and Equipment Testing</b><br>Records of tests including fire engine pumps, fire hoses, all ground and aerial ladders, and SCBAs                                                                                                   | 1 year<br>after disposal of<br>equipment             | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-12-030                 | <b>DEA (Drug Enforcement Agency) Forms</b><br>DEA 222 Order forms and receipts: forms used to document purchase and receipt of controlled substances in accordance with DEA regulations                                                      | 3 years                                              | Paper                |                                                         | <input type="checkbox"/>                   |
| FD-12-031                 | <b>Fire Incident Reports</b><br>Contains information on runs, address, owner, fire origin, vehicles dispatched, officer in charge, time, date, type of run, location, time return, address of run, alarm responses, burn complaints          | 5 years<br>after recorded in<br>Fire RMS<br>database | Electronic           |                                                         | <input type="checkbox"/>                   |



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**West Chester Township**

**Fire Department – (Revises schedule approved 04/06/2019)**

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                  | (3)<br>Retention Per                                                                                          | (4)<br>Media<br>Type                | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------|-------------------------------------|---------------------------------------------------------|--------------------------------------------|
| FD-12-032                 | <b>Fire Incident Reports – Fire RMS Database</b><br>Contains information on runs, address, owner, fire origin, vehicles dispatched, officer in charge, time, date, type of run, location, time return, address of run, alarm responses, burn complaints. Information retained for life of database or until migrated | Permanent<br>Life of database<br>then migrate                                                                 | Electronic                          |                                                         | <input type="checkbox"/>                   |
| FD-12-033                 | <b>Shift Log – TeleStaff Database</b><br>Scheduling software system: contains personnel, date & times worked; tracks hours to be paid, holiday, sick days, trades etc.; shift schedules                                                                                                                              | Life of database<br>then migrate                                                                              | Electronic                          |                                                         | <input type="checkbox"/>                   |
| FD-13-034                 | <b>Disaster Plan</b><br>Written instructions for township's response to disaster or emergency situations – original documents ( <i>formerly ADM-10-09</i> )                                                                                                                                                          | 1 year<br>after updated or<br>superseded and<br>no longer of<br>administrative<br>value                       | Paper/<br>Electronic                |                                                         | <input type="checkbox"/>                   |
| FD-13-035                 | <b>Disaster / Emergency Preparedness</b><br>Documentation of planning, training, practice drills and preparations                                                                                                                                                                                                    | Until no longer of<br>administrative<br>value                                                                 | Paper/<br>Electronic                |                                                         | <input type="checkbox"/>                   |
| FD-13-036                 | <b>Disaster and Emergency Incident</b><br>Logs, damage assessment and response reports, situation and resource allocation reports, incident plans, resource ordering and tracking, financial documentation, photographs, and similar related documentation ( <i>formerly ADM-10-010</i> )                            | 3 years<br>after incident<br>provided no<br>outstanding issues<br>and no longer of<br>administrative<br>value | Paper/<br>Electronic                |                                                         | <input type="checkbox"/>                   |
| FD-16-037                 | <b>Controlled Substance Forms</b><br>Documents the usage of a controlled substance on an EMS run                                                                                                                                                                                                                     | Life of database<br>(ePCR)                                                                                    | Paper until<br>scanned<br>into ePCR |                                                         | <input type="checkbox"/>                   |
| FD-16-038                 | <b>Confidentiality and Dissemination of Patient Information and Verification Policy</b><br>Confidentiality policy and procedure for outside EMT/Medic student ride along for clinical time                                                                                                                           | 3 years<br>and no action<br>pending                                                                           | Paper/<br>Electronic                |                                                         | <input type="checkbox"/>                   |
| FD-16-039                 | <b>CPR Records – Enrollware</b><br>Rosters, skills sheets, tests, and evaluations                                                                                                                                                                                                                                    | Life of database                                                                                              | Electronic                          |                                                         | <input type="checkbox"/>                   |
| FD-16-040                 | <b>Shift Log - Access Database Records</b><br>On duty personnel station assignment & hours worked, vehicles out of service, hydrants out of service, miscellaneous station notes                                                                                                                                     | Life of Database                                                                                              | Electronic                          |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

**West Chester Township**

**Fire Department – (Revises schedule approved 04/06/2019)**

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                    | (3)<br>Retention Per                 | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|------------------------------------------------------------------------------------------------------------------------|--------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| FD-19-041                 | <i>Quality Improvement Committee Chart Reviews-</i> Copies of EMS Reports that meet Medical Director's review criteria | Until no longer administrative value | Paper                |                                                         |                                            |



Ohio Historical Society  
State Archives of Ohio  
Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
Columbus, Ohio 43211-2497

## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

**West Chester Township**

**Human Resources (Supersedes schedule approved 06/05/2020)**

(local government entity)

(unit)

  
(signature of responsible official)

**Tonya Charles**  
(name)

**HR Manager**  
(title)

**5/12/21**  
(date)

### Section B: Records Commission

**West Chester Township**

**513-777-5900**

Records Commission

(telephone number)

**9113 Cincinnati Dayton Road**

**West Chester**

**45069**

**Butler**

(address)

(city)

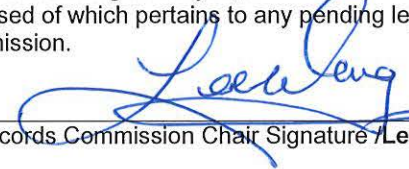
(zip code)

(county)

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

[JWhittaker@WestChesterOH.org](mailto:JWhittaker@WestChesterOH.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.

  
Records Commission Chair Signature / **Lee Wong, Chair, Board of Trustees**

**4/27/2021**  
Date

### Section C: Ohio Historical Society - State Archives

Signature

Title

Date

### Section D: Auditor of State

Signature

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**

Local Government Records Archived  
6/9/2021



**Ohio Historical Society**  
State Archives of Ohio  
Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | (3)<br>Retention<br>Period                                                  | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-001                 | <b>Acknowledgements</b><br>Employee receipt verifications of policies, handbooks, training, etc.                                                                                                                                                                                                                                                                                                                                                                                                                                                    | 1 year<br>after<br>employment<br>ends                                       | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-002                 | <b>Employment Opportunity Announcements</b><br>Internal or external announcements or advertisements of job openings, promotions, training programs (29 CFR 1602.31) (formerly "Advertisements of Job Opportunities")                                                                                                                                                                                                                                                                                                                                | 2 years                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-003                 | <b>Applications for Employment /Promotion – Hired</b><br>Applications, resumes, transcripts, letters of reference, professional certificates, and similar documents whose submission by candidates for vacant positions is required on the application form by application procedures or in the employment advertisement, background, psychological and other testing, audio/video of candidate, notes of interviews with candidates, correspondence and all other records that document the selection process (29 CFR 1602.31)                     | 5 years<br>after<br>employment<br>ends                                      | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-004                 | <b>Applications for Employment/Promotion– Not Hired</b><br>Applications, resumes, transcripts, letters of reference, professional certificates, and similar documents whose submission by candidates for vacant positions is required on the application form, by application procedures, or in the employment advertisement (29 CFR 1602.31) background, psychological and other testing, audio/video of candidate, notes of interviews with candidates, correspondence and all other records that document the selection process (29 CFR 1602.31) | 2 years                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-005                 | <b>Arbitration, Mediation and Fact Finding Reports</b><br>(See also HR-09-014, HR-09-054)                                                                                                                                                                                                                                                                                                                                                                                                                                                           | 3 years<br>after final<br>decision<br>rendered and<br>no actions<br>pending | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-006                 | <b>Authorization for Release of Private Information</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Until<br>superseded<br>or expired                                           | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-10-007                 | <b>Polygraph for Hiring and Promotion</b><br>Pre-employment or promotional written results of polygraph exam given to applicant before hiring or promotional decisions are made. Includes polygraph questionnaire and other documents and records related directly to the polygraph test (See also HR-09-008, HR-09-073 & HR-13-092)                                                                                                                                                                                                                | 2 years<br>after hiring or<br>promotional<br>decision is<br>made            | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



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Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                          | (3)<br>Retention<br>Period                                            | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-008                 | <b>Background Investigation Records for Hiring and Promotion</b><br>May include personal history, credit report, physical and/or aptitude tests, background checks, fingerprint cards, interview notes, questionnaire answers, narrative psychological reports, reference checks, and any resulting reports (29 CFR 1602.31) | 2 years<br>after decision                                             | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-009                 | <b>Employee Insurance Records</b><br>Copies of information relating to the selection by employees of life, disability, health, and other types of insurance; may include beneficiary information (CFR 29-1602.31)                                                                                                            | Until<br>superseded<br>or<br>employment<br>ends<br><br>Life of system | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-010                 | <b>CDL Records: Administrative Records</b><br>Records relating to administration of the CDL Program.                                                                                                                                                                                                                         | 5 years                                                               | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-013                 | <b>Change Of Status Record</b><br>Documents initial hire, promotion, resignation, termination, dismissal, pay raise or deduction, pay grade, position classification, etc. (CFR 29 1602.31)                                                                                                                                  | 2 years<br>after<br>employment<br>ends                                | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-014                 | <b>Collective Bargaining Agreements</b><br>Agreements and supporting documentation such as general correspondence; records relating to the selection of negotiators, mediators and arbitrators; negotiation session agendas, notes, recordings and summaries, etc. (29 CFR 516.5) (See also HR-09-005, HR-09-054)            | 3 years<br>after<br>superseded                                        | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-016                 | <b>Driver's License Verifications</b><br>Records of periodic checks by the township to ensure that employees have the appropriate valid drivers' licenses.                                                                                                                                                                   | Until<br>superseded<br>or<br>employment<br>ends                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-018                 | <b>EEOC Compliance Reports / Work Papers</b><br>Records regarding termination, resignation, dismissal, promotion, discipline, commendation (29 CFR 1602.32, .39, .41, .48 and .50)                                                                                                                                           | 3 years                                                               | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-019                 | <b>EEOC or Ohio Civil Rights Commission Employee Dispute Case Files</b><br>Information collected and filed involving employee dispute in regard to EEOC or OCRC                                                                                                                                                              | 7 years<br>after case<br>closed                                       | Paper                 |                                                         | <input type="checkbox"/>                   |



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**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | (3)<br>Retention<br>Period                                              | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-020                 | <b>Employee Recognition Records</b><br>Awards, commendations, letters, certificates, etc.                                                                                                                                                                                                                                                                                                                                                                                                             | Employment<br>end date                                                  | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-021                 | <b>Employee Assistance Program, Case Files</b><br>Confidential personnel records of the referral, diagnosis and recommended professional treatment or problem solving plan together with a history of implementation of the plan and resolution                                                                                                                                                                                                                                                       | 7 years<br>after last<br>treatment or<br>session                        | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-023                 | <b>Employee Conduct Investigation File, Sustained</b><br>Documentation compiled in official investigation of employee conduct that result in findings of misconduct by the employee. May include the complaint initiating the investigation, investigative reports, statements, taped information, audio and/or video recording corrective action, correspondence and notes (Follow union contract rules for purging from file) (See also HR-09-028 & HR-13-093)                                      | 5 years<br>after case<br>closed<br>provided all<br>actions<br>completed | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-024                 | <b>Employee Conduct Investigation Files, Unfounded, Not-Sustained, Exonerated</b><br>Documentation compiled in official investigation of employee conduct that does not result in findings of misconduct by the employee. May include the complaint initiating the investigation, investigative reports, statements, taped information, audio and/or video recording corrective action, correspondence and notes (Follow union contract rules for purging from file) (See also HR-09-028 & HR-13-093) | 1 year<br>after case<br>closed                                          | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-025                 | <b>Employee Data Sheet and Contact Information</b><br>Contact information including address, phone numbers, emergency names & numbers<br><i>Revised 2020</i>                                                                                                                                                                                                                                                                                                                                          | Until<br>superseded                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-026                 | <b>Employee Rosters</b><br>Lists of employees for each department kept for convenience and internal use                                                                                                                                                                                                                                                                                                                                                                                               | Until<br>superseded                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-027                 | <b>Employee Disciplinary Action Documentation</b><br>Disciplinary actions are those actions which may affect pay, status, or tenure (Follow union contract rules for purging from file) (formerly "Employment Action Records") (29 CFR 1602.14)                                                                                                                                                                                                                                                       | 5 years<br>after action                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



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**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                              | (3)<br>Retention<br>Period                                                  | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-028                 | <b>Employment Actions, Purged Records</b><br>Discipline, counseling or disputed records removed from personnel file according to current labor contract or RC1347 (See also HR-09-029 & HR-13-093)                                                                                                                                               | 1 year<br>after removal<br>from file                                        | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-029                 | <b>Employment Contracts</b><br>Individual employment contracts; or where contracts or agreements are not in writing, a written memorandum summarizing the terms. Includes riders issued.                                                                                                                                                         | 5 years<br>after<br>employment<br>ends                                      | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-030                 | <b>Employment Verifications</b><br>Records of verification of employment in response to external requests                                                                                                                                                                                                                                        | 1 year                                                                      | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-032                 | <b>Family and Medical Leave Act Records</b><br>Includes FMLA leave request relating to medical certifications, re-certifications or medical histories of employees or employees' family members. Kept separately in Medical File (29 CFR 825.500)                                                                                                | 3 years                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-033                 | <b>Grievance Records</b><br>Records relating to the review of employee grievances against personnel policies, working conditions, etc. May include but not limited to original grievance, investigative report, pre-hearing reports, grievance forms, related correspondence, summary sheets, employee history information and decision rendered | 5 years<br>after final<br>decision<br>rendered and<br>no actions<br>pending | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-034                 | <b>Benefit Plans</b><br>Employee benefit plans such as pension, life, health and disability insurance, etc. including amendments (29 CFR 1627.3(b)(2))                                                                                                                                                                                           | 1 year<br>after<br>termination of<br>plan                                   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-035                 | <b>Continuation of Coverage (COBRA) Records</b><br>Records of written notice of eligibility sent to 3 <sup>rd</sup> party vendors to notify employee of eligibility                                                                                                                                                                              | 18 months<br>from date of<br>notice                                         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-036                 | <b>Employee Insurance Reimbursement/Issues</b><br>Removed 2021                                                                                                                                                                                                                                                                                   |                                                                             |                       |                                                         |                                            |
| HR-09-037                 | <b>Hazardous Materials Exposure</b><br>Medical record of personal exposure to hazardous materials (retention based on requirements of 29 CFR 1910.1020 and 15 USC 2622)                                                                                                                                                                          | 30 years<br>after<br>employment<br>ends                                     | Paper                 |                                                         | <input type="checkbox"/>                   |



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**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                  | (3)<br>Retention<br>Period                                            | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-039                 | <b>Employment Eligibility Verification Form – 19</b><br>Applies to all employees hired after November 6, 1986<br>(8 CFR 274a.2)                                                                                                                                                                                                      | 3 years<br>from hire date<br>or 1 year<br>after<br>employment<br>ends | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-040                 | <b>Incident / Injury Reports and Associated Documentation</b><br>Record of employee occupational accident, injury or illness and other associated reports required to be submitted to the Ohio Bureau of Worker's Compensation, or maintained internally on accident frequency (29 CFR 1904.33) (See also WCT-09-033 and ADM-10-021) | 5 years<br>from end of<br>calendar year                               | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-041                 | <b>Incident / Injury Reports – No Claim Filed</b><br>Reports of accidents or incidents occurring to an employee in the performance of his/her job, or to any other person (See also WCT-09-033 and ADM-10-021)                                                                                                                       | 5 years                                                               | Electronic            |                                                         | <input type="checkbox"/>                   |
| HR-09-042                 | <b>Job and Position Description Files</b><br>A history of positions, classifications, and corresponding job descriptions as these positions are revised. Job descriptions including all associated task or skill statements (See also HR-09-061)                                                                                     | 1 year<br>after<br>superseded                                         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
|                           | <b>Combined with 09-042</b>                                                                                                                                                                                                                                                                                                          |                                                                       |                       |                                                         | <input type="checkbox"/>                   |
| HR-09-044                 | <b>Accumulated Leave Adjustment Records</b><br>Employee leave balances, leave donations etc.<br>(formerly "Leave Balances, Leave Donations, Leave Requests, Longevity Records" – electronic)                                                                                                                                         | 3 years<br>provided<br>audited                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-047                 | <b>Payroll Records and Leave Requests</b><br>Payroll records including timesheets, applications submitted by employees for sick, vacation, compensatory, personal, long-term and other leave time, and other reports used for entry into payroll system. Also includes payroll checklist report.                                     | 3 years<br>provided<br>audited<br><br>Life of system                  | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |

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 O.R.C.



**Ohio Historical Society**  
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Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
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**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                | (3)<br>Retention<br>Period                                                       | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-048                 | <b>Status Letters</b><br>Letter of appointment/offer letters, employment, promotion, resignation, or termination ( <i>formerly "Letter of Appointment or Employment"</i> )<br><i>Revised 2020</i>                                                                                                                                                                                                  | 5 years<br>after<br>employment<br>ends                                           | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-053                 | <b>Longevity Records</b><br>Report related to duration of time employee is with township                                                                                                                                                                                                                                                                                                           | Until<br>superseded<br>and no longer<br>of<br>administrative<br>value            | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-054                 | <b>Memoranda of Understanding or Agreement</b><br>Legal documents representing understandings between the township and bargaining units ( <i>See also HR-09-005, HR-09-014</i> )                                                                                                                                                                                                                   | 3 years<br>after<br>superseded<br>or expired                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-055                 | <b>Organizational Charts &amp; Personnel Allocation Charts</b><br>Personnel and functional charts of positions and personnel holding positions ( <i>See also WCT-09-042</i> )                                                                                                                                                                                                                      | 3 years<br>after<br>superseded                                                   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-056                 | <b>OSHA – PERRP 300 Compliance Log</b><br>The 300P log and the 301P log and 300AP Summary identifies all employee injuries within a calendar year, Not including HazMat incidents/issues ( <i>29 CFR 1904.33</i> )                                                                                                                                                                                 | 5 years<br>following end<br>of calendar<br>year in which<br>the records<br>cover | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-059                 | <b>Employee Deduction Authorization</b><br>Documentation used to start, modify, or stop all voluntary or required deductions from payroll including credit union, health care, dental, ancillary benefits, union dues, city tax, garnishment or other court-ordered attachments, and direct deposit authorization forms ( <i>formerly "Payroll Records, Garnishments"</i> )<br><i>Revised 2020</i> | 5 years<br>after order<br>expires or<br>employment<br>ends                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-061                 | <b>Compensation Plans</b><br>Written plans outlining job titles and pay scales for township employees ( <i>formerly Payroll Records, Pay Plans</i> ) ( <i>See also HR-09-043</i> )                                                                                                                                                                                                                 | 3 years<br>after<br>superseded                                                   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-064                 | <b>Pensions Records</b><br>Records of applications for pensions ( <i>formerly "Pensions Awarded"</i> )                                                                                                                                                                                                                                                                                             | 60 years<br>after<br>employment<br>ends                                          | Paper                 |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Human Resources

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | (3)<br>Retention<br>Period                                                                                                     | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-065                 | <b>Performance Evaluation</b><br>Periodic assessment of employees' performance, and planning for future performance (29 CFR 1620.32(c))                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 5 years<br>after<br>superseded<br>or<br>employment<br>ends                                                                     | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-09-067                 | <b>Personnel File – Active Official Record</b><br>Documentation of an individual employee's work history, complete job application; acknowledgements; releases; change of status; recognition records; data sheets; corrective or disciplinary actions; contracts for employment and reimbursements; status letters (appointment, promotion, resignation, etc.); payroll deduction requests (including direct deposit request forms); evaluations; training records; unemployment compensation; equipment/uniform issue; wage and tax forms; pay and salary documentation; selection of benefit plans; beneficiary designations; including records pertaining to age, address, telephone number and social security number and emergency contacts; and others. | Follow<br>retention<br>schedule for<br>individual<br>record series                                                             | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-068                 | <b>Personnel File – Inactive Official Record</b><br>Former Employee Verification Records. Minimum information needed to verify employment, includes name, SSN, exact dates of employment, last known address and most recent public access option form; includes retirement records and pay records Records pertaining to DOB, age, address, telephone number and social security number and emergency contacts; and others<br>(See also HR-09-064, FIN-10-028 & FIN-10-036)<br>Revised 2020                                                                                                                                                                                                                                                                   | 60 years<br>from date of<br>separation<br>from township<br>after all other<br>docs are<br>disposed<br>according to<br>schedule | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-070                 | <b>Physical Examination / Medical Records</b><br>Employee medical or physical examination reports or certificates including job related medical exam or other employment-related reasons (does not include pre-employment physicals) Kept in separate confidential file<br>(See also HR-13-092)                                                                                                                                                                                                                                                                                                                                                                                                                                                                | 2 years<br>after<br>superseded<br>or<br>employment<br>ends                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                |                       |                                                         |                                            |



**Ohio Historical Society**  
State Archives of Ohio  
Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                     | (3)<br>Retention<br>Period                                         | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-071                 | <b>Personnel Policies and Procedures</b><br>Records that define Township-wide policies and procedures concerning personnel                                                                                                                                                                                                                                              | 3 years<br>after<br>superseded                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-10-072                 | <b>Polygraph, Internal Investigation</b><br>Results of polygraph test given as part of internal investigation. Includes records and documents related directly to the polygraph test (See also HR-09-023, HR-09-024)                                                                                                                                                    | 2 years<br>and no longer<br>of<br>administrative<br>or legal value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-073                 | (29 CFR 1602.31)<br>Was combine with HR-09-003 & 004                                                                                                                                                                                                                                                                                                                    |                                                                    |                       |                                                         | <input type="checkbox"/>                   |
| HR-09-075                 | <b>Tests Results for Alcohol and Controlled Substances including CDL</b><br>Records documenting random and reasonable suspicion testing for abuse/use of alcohol and or controlled substance; includes test results, corrective action, treatment, etc. in accordance with Township policy (49 CFR 382.401) (does not include pre-employment drug test – See HR-13-092) | 5 years<br>for positive<br>test<br>1 year<br>for negative<br>test  | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-076                 | <b>Training Administration Records</b><br>Instructional materials and other records associated with in-house training of personnel on personnel policies and procedures and other policies and procedures that govern Township programs, services or projects (formerly "Training Information, Orientation")                                                            | Until<br>superseded<br>or 1 year<br>after<br>employment<br>ends    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-078                 | <b>Training and Educational Achievement Records</b><br>Certificates of completion, transcripts, test scores, or similar records documenting the training, testing, or continuing education achievements of an employee (formerly "Training Records, Individual")                                                                                                        | 5 years<br>after<br>employment<br>ends                             | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-080                 | <b>Contract for Training and Tuition Reimbursement</b><br>Written agreement between employee and township whereby employee agrees to reimburse the township for training expenses if employee leaves township within a certain period of time following completion of certain types of training.                                                                        | 2 years<br>after<br>superseded<br>or<br>employment<br>ends         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Human Resources

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                   | (3)<br>Retention<br>Period                                                                              | (4)<br>Media<br>Type                                                                      | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------|---------------------------------------------------------|--------------------------------------------|
| HR-09-082                 | <b>Unemployment Compensation Records</b><br>Reports and claim records for unemployment insurance                                                                                                                                                                                                                                                      | 1 year<br>after claim<br>filed                                                                          | Paper                                                                                     |                                                         | <input type="checkbox"/>                   |
| HR-09-083                 | <b>Uniform / Gear / Equipment Records</b><br>Requests, fulfillment, exchange and turn-in records                                                                                                                                                                                                                                                      | 1 year<br>after<br>employment<br>ends                                                                   | Paper                                                                                     |                                                         | <input type="checkbox"/>                   |
| HR-09-085                 | <b>W-2 Forms &amp; Other Federal Tax Records</b><br>Includes 1099, W2, FICA, and other tax records (26 CFR 31.6001-1(e)(2))                                                                                                                                                                                                                           | 4 years<br><br>Life of system                                                                           | Paper /<br>Electronic                                                                     |                                                         | <input type="checkbox"/>                   |
| HR-09-086                 | <b>W-4 Forms</b><br>Employer's copy of "Employee's Withholding Exemption Certificate." (26 CFR 31.6001-1(e)(2))                                                                                                                                                                                                                                       | 4 years<br>after<br>superseded<br>or<br>employment<br>ends<br><br>Life of system                        | (ended<br>2020 all<br>revised in<br>2020 with<br>electronic<br>submissions)<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-09-087                 | <b>Worker's Compensation</b><br>Supplemental reports and claim records for workers' compensation                                                                                                                                                                                                                                                      | 5 years                                                                                                 | Paper                                                                                     |                                                         | <input type="checkbox"/>                   |
| HR-13-090                 | <b>Address Change Form / Submission</b>                                                                                                                                                                                                                                                                                                               | As<br>superseded<br>Last<br>submission<br>60 years<br>after<br>employment<br>ends<br><br>Life of system | Paper /<br>Electronic                                                                     |                                                         | <input type="checkbox"/>                   |
| HR-13-091                 | <b>Deferred Compensation Records</b><br>Documents from the state regarding deductions                                                                                                                                                                                                                                                                 | Until<br>superseded<br>or account<br>closed                                                             | Paper                                                                                     |                                                         | <input type="checkbox"/>                   |
| HR-13-092                 | <b>Employment Selection Records</b><br>Includes notes of interviews with candidates, questions asked of applicants, audio/video of applicant, driving records, and previous injury checks, pre-employment physical examinations, pre-employment drug testing, skills tests and all other records that document the selection process (29 CFR 1602.31) | 2 years<br>after hiring<br>decision                                                                     | Multi                                                                                     |                                                         | <input type="checkbox"/>                   |



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**Section E: Records Retention Schedule**

**West Chester Township**

**Human Resources**

(Supersedes schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                  | (3)<br>Retention<br>Period                                    | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| HR-13-093                 | <b>Employee Corrective Action Documentation</b><br>Corrective actions are those actions which do not affect pay, status, or tenure and are imposed to correct or improve an employee's job performance ( <i>Follow union contract rules for purging from file</i> ) (29 CFR 1602.14) (See also HR-09-023, 024 & 028) | 1 year<br>after action                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-13-094                 | <b>Resumes, Unsolicited</b><br>Retention period applies if replies are made to the sender of resume stating that it will be kept on file for future job openings                                                                                                                                                     | Until no<br>longer of<br>administrative<br>value              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-13-095                 | <b>Risk Management</b><br>Records that document risk control standards for the Township including meeting minutes, safety issues and mitigation, policy, facility safety inspections and other issues ( <i>formerly ADM-10-042</i> )                                                                                 | Permanent                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-13-096                 | <i>Combined with HR 09-068 – already included in HR 09-067</i>                                                                                                                                                                                                                                                       | 60 years<br>after<br>employment<br>ends<br><br>Life of system | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| HR-16-097                 | <b>Risk Management – Incident / Injury Supplemental Forms</b><br>Forms created solely to determine root cause for future safety or training purposes. Not tied to incident record and without employee identification                                                                                                | Until no<br>longer of<br>administrative<br>value              | Paper                 |                                                         | <input type="checkbox"/>                   |
| HR-20-098                 | <b>Employee Engagement</b><br>Forms, documents, surveys presentations related to employee engagement initiatives including employee satisfaction surveys, and employee training surveys<br><i>Added 2020</i>                                                                                                         | 3 years                                                       | Paper /<br>Electronic |                                                         |                                            |

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 O.R.C



Ohio Historical Society  
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OHIO HISTORY CONNECTION

MAY 21 2024

STATE AND LOCAL  
GOVERNMENT RECORDS

Page 1 of 8

## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

West Chester Township

(local government entity)

Police Department

(Revises Police Department Schedule approved 05/26/2021)

(unit)

(signature of responsible official)

Joel Herzog

(name)

Chief of Police

(title)

5/17/24  
(date)

### Section B: Records Commission

West Chester Township

Records Commission

513-777-5900

(telephone number)

9113 Cincinnati Dayton Road

(address)

West Chester

(city)

45069

(zip code)

Butler

(county)

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

[jwhittaker@westchesteroh.org](mailto:jwhittaker@westchesteroh.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.

05/07/2024

Records Commission Chair Signature / Lee Wong, Chair, Board of Trustees

Date

### Section C: Ohio Historical Society - State Archives

Government Records Archivist

6/13/2024

Signature

Title

Date

### Section D: Auditor of State

Signature

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

West Chester Township

Police Department

(Revises Police Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                   | (3)<br>Retention<br>Period                                                  | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| PD-98-1                   | <b>Accident Files</b> – Vehicle Crash Reports                                                                         | 3 years                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-2                   | <b>Activity Reports</b> – Includes but not limited to reporting activity, officer activity, and case closure activity | 2 years provided<br>no action pending                                       | Paper/<br>Electronic  |                                                         | <input type="checkbox"/>                   |
| PD-98-3                   | <b>Arrest Jackets (Adults)</b>                                                                                        | Until age 80 or<br>deceased                                                 | Paper                 |                                                         | <input type="checkbox"/>                   |
| PD-98-4                   | <b>Arrest Jackets (Juveniles)</b>                                                                                     | Until age 18                                                                | Paper                 |                                                         | <input type="checkbox"/>                   |
| PD-98-6                   | <b>Breathalyzer Records</b>                                                                                           | 3 years                                                                     | Paper                 |                                                         | <input type="checkbox"/>                   |
| PD-98-7                   | <b>Business Security Records</b>                                                                                      | Until superseded -<br>review annually                                       | Paper                 |                                                         | <input type="checkbox"/>                   |
| PD-98-9                   | <b>Child Abuse Records</b>                                                                                            | 7 years<br>after case closed                                                | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-10                  | <b>Confiscated/Impounded Vehicles</b>                                                                                 | 2 years<br>after sale or other<br>disposal                                  | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
|                           |                                                                                                                       |                                                                             |                       |                                                         | <input type="checkbox"/>                   |
| PD-98-13                  | <b>Criminal Case Files – (Misdemeanors)</b>                                                                           | 15 Years                                                                    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-19                  | <b>Field Interrogations Cards</b>                                                                                     | Permanent                                                                   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-20                  | <b>Firearm Registration</b>                                                                                           | 3 years<br>after expiration                                                 | Paper                 |                                                         | <input type="checkbox"/>                   |
| PD-98-21                  | <b>FBI Reports – UCR Reports Submitted to FBI</b>                                                                     | 3 years                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-24                  | <b>Jail Inspection Records</b><br>Files and records prepared for and received from<br>State of Ohio                   | 5 years<br>after date of<br>inspection-<br>provided violations<br>corrected | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-25                  | <b>Jail Records of Personal Property</b>                                                                              | 2 years                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Police Department

(Revises Police Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                           | (3)<br>Retention<br>Period                    | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| PD-98-26                  | <i>Log of Prisoners</i><br>(formerly "Jail Register")                                                                                         | Permanent                                     | Paper /<br>Electronic |                                                         | ✓                                          |
| PD-98-30                  | <i>Missing Persons Reports</i>                                                                                                                | Permanent                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-36                  | <i>Prisoner Booking Records</i>                                                                                                               | 6 years provided<br>no action pending         | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-39                  | <i>Recovered Property Records</i>                                                                                                             | 2 years<br>after disposal of<br>property      | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-41                  | <i>Traffic Citations</i><br>Citations for traffic violations                                                                                  | 3years                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-44                  | <i>Vacation House Check Records</i> – Records of<br>Unoccupied home checks.                                                                   | 30 days<br>after owner's<br>return            | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-46                  | <i>Vehicle Towing Records</i>                                                                                                                 | 3 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-47                  | <i>Warning Citations</i>                                                                                                                      | Permanent                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-98-48                  | <i>Work Schedules</i>                                                                                                                         | 1 year<br>after schedule<br>change            | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-50                  | <i>Alarm Drop Records</i><br>Records kept related to officer response to alarm<br>drops                                                       | 1 year                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-51                  | <i>Armory Log Sheets - Sign Out Log</i><br>Employee sign out of firearms                                                                      | Until no longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-52                  | <i>Briefing Books - Roll Call Records</i><br>Briefing information distributed at each roll call                                               | 1 year                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-53                  | <i>Canine Action Reports and Logs</i><br>Documentation of calls needing canine assistance                                                     | 5 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-54                  | <i>Citizen Police Academy Record</i><br>Backgrounds, applications for CPA participants,<br>evaluations and miscellaneous instruction sign off | 1 year                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Police Department

(Revises Police Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                            | (3)<br>Retention<br>Period                    | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| PD-14-55                  | <b>Confidential Informant Records</b><br>Info collected on an individual relating to their use during an investigation         | 5 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-56                  | <b>Court Appearance Log</b><br>Logs to confirm court appearances                                                               | Until no longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-57                  | <b>Detail Records (Detail Assignments)</b><br>Information created to document off-duty detail assignments                      | 3 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-58                  | <b>Discharge of Firearm (Animal)</b><br>Necessary paperwork to document disposal of a sick/injured animal by firearm           | 3 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-59                  | <b>Injury to Prisoner Records</b><br>Records documenting injury to prisoner while in custody                                   | 5 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-60                  | <b>Instructor Lesson Plans</b><br>Associated with employee training                                                            | 10 years                                      | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-61                  | <b>Mobile ID Unit - Sign Out Sheet</b><br>For portable fingerprint unit                                                        | Until no longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-62                  | <b>OHLEG Request for Access Form</b><br>Employee access request form for permission to access Ohio law enforcement information | Until superseded                              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-63                  | <b>Police Intern Records</b><br>Requests and related information for police intern applicants                                  | 1 year                                        | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-64                  | <b>Progressive Report Form (Daily Activity Reports)</b>                                                                        | 2 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-65                  | <b>Property Logs</b><br>Logs itemizing incoming items to the police property room                                              | Permanent                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-66                  | <b>Pursuit Reports and Logs</b><br>Documenting pursuits when necessary for apprehension of criminals                           | 5 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-67                  | <b>Response to Resistance Reports and Logs</b><br>Reports documenting resistance of suspects during apprehension               | 5 years                                       | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-68                  | <b>RF13 and Preventive Patrol Hangers</b><br>Notification to citizens advising of unsecured homes, buildings, etc.             | Until no longer of<br>administrative<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Police Department

(Revises Police Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                        | (3)<br>Retention<br>Period                                                                                                                                                              | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| PD-14-69                  | <b>SWAT Action Reports and Logs</b><br>Records kept documenting SWAT usage                                                                                                 | 5 years                                                                                                                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-70                  | <b>Use of Force Reports and Logs</b><br>Records kept documenting use of force during<br>apprehension and arrest                                                            | 5 years                                                                                                                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-71                  | <b>Warrant Files/Jackets of Served Warrants</b><br>Served warrant information on arrests                                                                                   | 3 years                                                                                                                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-14-72                  | <b>Warrant Logs</b><br>Log kept on served warrants                                                                                                                         | Until no longer of<br>administrative<br>value                                                                                                                                           | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-15-73                  | <b>Public Appearance Reports</b><br>Documents public appearances by officers                                                                                               | 2 years                                                                                                                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-15-74                  | <b>Subpoena Logs</b><br>Subpoenas received by court                                                                                                                        | 5 years                                                                                                                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-15-75                  | <b>SIU/DPU Drug Complaint Files</b>                                                                                                                                        | 2 years                                                                                                                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-15-76                  | <b>Body Camera Video / Audio Recordings</b>                                                                                                                                | 30 days<br>except that<br>portions of<br>recordings relating<br>to specific cases<br>may be captured<br>separately and<br>retained as part of<br>and for the life of<br>the case record | Electronic            |                                                         | <input type="checkbox"/>                   |
| PD-15-77                  | <b>Open Detail Form</b><br>Form showing available off duty details                                                                                                         | 30 days<br>after detail filled                                                                                                                                                          | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-15-78                  | <b>Court Appearance Record</b><br>Documents / verifies officer's appearance in court                                                                                       | 2 years                                                                                                                                                                                 | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-15-79                  | <b>Rejected Report Log</b><br>List of reports rejected back to officers for correction<br>in order to track and verify they are returned for data<br>entry and safekeeping | Until no longer of<br>administrative<br>value                                                                                                                                           | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Police Department

(Revises Police Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                           | (3)<br>Retention<br>Period                                                                                                 | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| PD-18-80                  | <b>Sign In Sheets</b><br>(See also WCT-09-073)                                                                                                                | 1 year                                                                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-18-81                  | <b>Law Enforcement Officers Safety Act (LEOSA)<br/>Retiree Registration Form/Requalification Form</b><br>Retired Officer's paperwork to requalify with weapon | 1 year                                                                                                                     | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-18-82                  | <b>Requests to See a Police Officer</b>                                                                                                                       | Until no longer of<br>administrative<br>value                                                                              | Paper                 |                                                         | <input type="checkbox"/>                   |
| PD-18-83                  | <b>Felony Offense Reports Specific to ORC 2907.02<br/>and 2907.03</b> Felony offense reports specific to ORC<br>2907.02 and 2907.03                           | 25 years                                                                                                                   | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| PD-19-84                  | <b>Offense Reports – Felonies – Defined in ORC<br/>2901.13</b>                                                                                                | 20 years provided<br>no action pending                                                                                     | Paper/<br>Electronic  |                                                         |                                            |
| PD-19-85                  | <b>Expunged Records per Expunged Order</b>                                                                                                                    | Destroy all files,<br>records and<br>computer<br>reference when<br>Expungement<br>order received<br>from a Court           | Paper/<br>Electronic  |                                                         |                                            |
| PD-19-86                  | <b>Ride Along Request/Release Packets</b>                                                                                                                     | 2 years or no<br>longer of<br>administrative<br>value                                                                      | Paper/<br>Electronic  |                                                         |                                            |
| PD-19-87                  | <b>Vendor Application</b> (transient)                                                                                                                         | 1 year or no<br>longer of<br>administrative<br>value                                                                       | Paper/<br>Electronic  |                                                         |                                            |
| PD-19-88                  | <b>Hand Delivery Confirmation Sheets</b>                                                                                                                      | Until no longer of<br>administrative<br>value                                                                              | Paper/<br>Electronic  |                                                         |                                            |
| PD-20-89                  | <b>Property Disposition Sign-Off Sheets – Body<br/>Camera</b><br>Added 2020                                                                                   | Until scanned and<br>attached in RMS<br>System. Disposed<br>of in accordance<br>with Record<br>Series<br>Title/Description | Paper/<br>Electronic  |                                                         |                                            |



Section E: Records Retention Schedule

West Chester Township

Police Department

(Revises Police Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                        | (3)<br>Retention<br>Period                                                                               | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| PD-20-90                  | <i>Property Disposition Sign-Off Sheets – Property Room</i><br>Added 2020                                                                                                  | Until scanned and attached in RMS System. Disposed of in accordance with Record Series Title/Description | Paper/<br>Electronic |                                                         |                                            |
| PD-20-91                  | <i>Retail Theft Arrest Reports</i><br>Added 2020                                                                                                                           | Until no longer of administrative value                                                                  | Paper                |                                                         |                                            |
| PD-20-92                  | <i>Retail Theft Warrant Reports</i><br>Added 2020                                                                                                                          | Until no longer of administrative value                                                                  | Paper                |                                                         |                                            |
| PD-20-93                  | <i>Abandoned Vehicle TSU Notification</i><br>Added 2020                                                                                                                    | Until no longer of administrative value                                                                  | Paper                |                                                         |                                            |
| PD-20-94                  | <i>ILeads ILX Sheets</i><br>Added 2020                                                                                                                                     | Until no longer of administrative value                                                                  | Paper                |                                                         |                                            |
| PD-20-95                  | <i>Deceased Persons Reports (Death/DOA/Suicide)</i><br>Includes incident report and case records/jacket (solved, non-suspicious, non-criminal circumstances)<br>Added 2020 | Permanent                                                                                                | Paper/<br>Electronic |                                                         |                                            |
| PD-20-96                  | <i>Fatal Accident Reports (not Vehicular Manslaughter or Homicide)</i><br>Added 2020                                                                                       | Permanent                                                                                                | Paper/<br>Electronic |                                                         |                                            |
| PD-20-97                  | <i>Domestic Violence Supplement Report</i><br>Added 2020                                                                                                                   | Until scanned and attached in RMS System. Disposed of in accordance with Record Series Title/Description | Paper/<br>Electronic |                                                         |                                            |
| PD-20-98                  | <i>Training Request Forms &amp; Associated Paperwork</i><br>Added 2020                                                                                                     | Until no longer of administrative value                                                                  | Paper                |                                                         |                                            |
| PD-20-99                  | <i>Telephone/Radio Audio Request Forms</i><br>Added 2020                                                                                                                   | Until no longer of administrative value                                                                  | Paper                |                                                         |                                            |



Section E: Records Retention Schedule

West Chester Township

Police Department

(Revises Police Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                | (3)<br>Retention<br>Period                                                                               | (4)<br>Media<br>Type     | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------|--------------------------|---------------------------------------------------------|--------------------------------------------|
| PD-20-100                 | <b>Original Incident/Accident/Case Related Documents</b><br>Convert to a minimum 300 dpi PDF image and attached in RMS System<br><i>Added 2020</i> | Until scanned and attached in RMS System. Disposed of in accordance with Record Series Title/Description | Paper                    |                                                         |                                            |
| PD-21-101                 | <b>Canine Records</b> - All records related to training, performance, purchase agreements, certification and medical records of police canines.    | 2 years after canine retires from service or is deceased                                                 | Paper/<br>electroni<br>c |                                                         |                                            |



## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

West Chester Township

(local government entity)

Finance Department

(Revises Finance Department Schedule approved 06/05/2020)

(unit)



(signature of responsible official)

Ken Keim

(name)

Director, Finance

(title)

5/17/2024

(date)

### Section B: Records Commission

West Chester Township

Records Commission

513-777-5900

(telephone number)

9113 Cincinnati Dayton Road

(address)

West Chester

(city)

45069

(zip code)

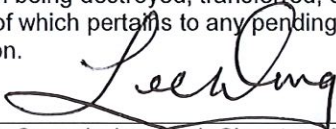
Butler

(county)

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

[jwhittaker@westchesteroh.org](mailto:jwhittaker@westchesteroh.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.



05/07/2024

Records Commission Chair Signature / Lee Wong, Chair, Board of Trustees

Date

### Section C: Ohio Historical Society - State Archives

Government Records Archivist

6/13/2024

Signature

Title

Date

### Section D: Auditor of State

Signature

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

West Chester Township

Finance Department

(Revised Finance Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                        | (3)<br>Retention<br>Period                                                                                                     | (4)<br>Media<br>Type                                         | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------|--------------------------------------------|
| FIN-10-01                 | <b>Accounts Payable Records</b><br>Invoices, vouchers, warrants, billing records; documents payment of bills for goods and services received. Payment from general accounts. May include correspondence, reports, invoices, statements, vouchers, packing/delivery slips, purchase orders, payment authorizations, receipt records, canceled checks or warrants, appropriations ledger, cash journal, expenditures, and similar documents. | 3 years<br>after last<br>entry<br>provided<br>audited<br><br>Min 3 years<br>after last<br>entry & as<br>Cloud space<br>allows  | Paper/Electronic /<br><br>ERP<br>Software<br>Upload/Cloud    |                                                         | <input type="checkbox"/>                   |
| FIN-10-02                 | <b>Accounts Receivable Records</b><br>Also Called: Cash Receipts. May include reports, receipts, invoices, awards, journals, logs, lists, summaries, statements and similar records. See FIN-18-047                                                                                                                                                                                                                                        | 3 years<br>after last<br>entry,<br>provided<br>audited<br><br>Min 3 years<br>after last<br>entry & as<br>Cloud space<br>allows | Paper /<br>Electronic<br><br>ERP<br>Software<br>Upload/Cloud |                                                         | <input type="checkbox"/>                   |
| FIN-10-04                 | <b>Audit Records</b><br>Annual or special reports prepared by external auditors. Opinion and Management letters. Audit records not part of the CAFR.                                                                                                                                                                                                                                                                                       | 5 Years                                                                                                                        | Paper                                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-05                 | <b>Audit Work Papers</b><br>Documentation consisting of routine correspondence with auditors and copies of township records compiled for use by auditors in performing an audit.                                                                                                                                                                                                                                                           | 2 years<br>after<br>completion of<br>audit                                                                                     | Paper /<br>Electronic                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-06                 | <b>Bank Records</b><br>Account statements, deposit books, deposit and withdrawal slips, canceled checks, voided checks, check stubs, check registers, passbooks, collateral letters, statements and receipts for Interest Income that document the banking transactions of the township with financial institutions, and the current status of public funds.<br><i>Revised 2020</i>                                                        | 4 years<br>provided<br>audited<br><br>Min 4 years<br>after last<br>entry & as<br>Cloud space<br>allows                         | Paper /<br>Electronic<br><br>ERP<br>Software<br>Upload/Cloud |                                                         | <input type="checkbox"/>                   |
| FIN-10-07                 | <b>Bonds &amp; Notes – Borrowings</b><br>Certified record of proceedings relating to a bond issue and arbitrage calculations, containing specimen (usually original) documents related to the approval process and issuance of bonds typically compiled in book form for presentation to the township by the bond agent or bond counsel.                                                                                                   | Active + 5<br>years<br>provided<br>audited                                                                                     | Paper /<br>Electronic                                        |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Finance Department

(Revised Finance Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period                                                             | (4)<br>Media<br>Type                                             | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------|------------------------------------------------------------------|---------------------------------------------------------|--------------------------------------------|
| FIN-10-09                 | <b>Budget Working Papers</b><br>Documents used in the preparation of the annual township budget; estimates expenditures and disbursements. May include correspondence, budget requests, proposal and instructions, computer reports, notes, staff reports, worksheets, surveys, and other related materials.                           | 3 years<br>provided<br>audited                                                         | Paper /<br>Electronic                                            |                                                         | <input type="checkbox"/>                   |
| FIN-10-10                 | <b>Certificate Of Estimated Resources, Official And Amended</b><br>Prepared by the county, the certificate included the estimated unencumbered fund balances and estimated revenues for each fund. The amounts are added together and represent the estimated resources for each fund and the maximum amount that may be appropriated. | 5 years<br>provided<br>audited                                                         | Paper /<br>Electronic                                            |                                                         | <input type="checkbox"/>                   |
| FIN-10-011                | <b>Comprehensive Annual Financial Report (CAFR)</b><br>Documents the general financial condition and operation of township on an annual basis. (ORC 507.07)                                                                                                                                                                            | Permanent                                                                              | Paper                                                            |                                                         | ✓✓                                         |
| FIN-10-012                | <b>Comprehensive Annual Financial Report (CAFR) Working Papers/Folders</b><br>Accumulated information used to create the Annual Financial Report.                                                                                                                                                                                      | 5 years after<br>CAFR<br>published<br>provided<br>audited                              | Paper /<br>Electronic                                            |                                                         | <input type="checkbox"/>                   |
| FIN-10-013                | <b>Credit Card Records</b><br>Records of the administration of credit cards issued to the township for township use (See also FIN-20-048)<br><i>Revised 2020</i>                                                                                                                                                                       | Active + 1<br>year<br>after<br>cancellation                                            | Paper                                                            |                                                         | <input type="checkbox"/>                   |
| FIN-10-014                | <b>Depository Agreements</b><br>Documents from the Township's bank detailing services providing fees and length of services covered in the contract.                                                                                                                                                                                   | Active + 3<br>years,<br>provided<br>audited                                            | Paper                                                            |                                                         | <input type="checkbox"/>                   |
| FIN-10-015                | <b>Financial Reports (Computer Generated)</b><br>Daily and monthly reports printed in the normal course of business. Including but not limited to: APEDIT and WRITEPOS.                                                                                                                                                                | Until<br>superseded<br>or no longer<br>of<br>administrative<br>value                   | Paper                                                            |                                                         | <input type="checkbox"/>                   |
| FIN-10-016                | <b>Fund Establishment</b><br>Records pertaining to the creation and purposes of special funds that are separate from the General Fund.                                                                                                                                                                                                 | Permanent                                                                              | Paper /<br>Electronic                                            |                                                         | <input type="checkbox"/>                   |
| FIN-10-017                | <b>General Ledger</b><br>Journals, registers, monthly ledgers, journal entries. May include date, payee, purpose, fund credited or debited, check number and similar ore related data.                                                                                                                                                 | 3 years<br>after last<br>entry<br>provided<br>audited<br><br>Min 3 years<br>after last | Paper /<br>Electronic<br><br>ERP<br>Software<br>Upload/Clo<br>ud |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Finance Department

(Revised Finance Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                      | (3)<br>Retention<br>Period                                                                             | (4)<br>Media<br>Type                                         | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------|--------------------------------------------|
|                           |                                                                                                                                                                                                                                                                                                          | entry & as<br>Cloud space<br>allows                                                                    |                                                              |                                                         |                                            |
| FIN-10-018                | <b>Investment Records</b><br>Including but not limited to statements.                                                                                                                                                                                                                                    | Active + 3<br>years<br>provided<br>audited                                                             | Paper                                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-020                | <b>Landscape District Assessments</b><br>Including but not limited to annual assessment reports<br>and collections.                                                                                                                                                                                      | Active + 5<br>years                                                                                    | Paper /<br>Electronic                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-021                | <b>Levy Files</b><br>Official files created by the township including research,<br>reports and final results reported by Butler County.                                                                                                                                                                  | Active + 5<br>year<br>and no longer<br>of<br>administrative<br>value                                   | Paper                                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-022                | <b>Lighting District Assessments</b><br>Including but not limited to annual assessments reports,<br>collections and petitions.                                                                                                                                                                           | Active + 5<br>years                                                                                    | Paper /<br>Electronic                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-026                | <b>Motor Vehicle License Tax Audits</b><br>Documents amount of money township will receive or<br>pay to other entities after the audit of motor vehicle<br>licenses.                                                                                                                                     | 3 years<br>provided<br>audited                                                                         | Paper /<br>Electronic                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-028                | <b>Payroll Records, Individual Annual Record</b><br>Bi-Weekly Payroll Check Register, Master Control,<br>Quarterly Reports, Personnel and Garnishments.<br><i>Finance no longer has records after 12/31/23</i>                                                                                           | 60 years                                                                                               | Paper                                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-029                | <b>Payroll Records, Individual Annual Record</b><br>Reports for Payroll Summary. Journal Entries,<br>Warrants, and any other reports used for data entry into<br>accounting system.<br><i>Finance no longer has records after 12/31/23</i>                                                               | 3 years<br>and no longer<br>of<br>administrative<br>or legal value                                     | Paper /<br>Electronic                                        |                                                         | <input type="checkbox"/>                   |
| FIN-10-033                | <b>Reconciliation Folders</b><br>Monthly bank reconciling folders containing, but not<br>limited to bank statements, cash receipt balancing, etc.                                                                                                                                                        | 4 years<br>provided<br>audited<br><br>Min 4 years<br>after last<br>entry & as<br>Cloud space<br>allows | Paper /<br>Electronic<br><br>ERP<br>Software<br>Upload/Cloud |                                                         | <input type="checkbox"/>                   |
| FIN-10-036                | <b>Retirement Contribution Records</b><br>Records containing calculations and payment records<br>for Ohio Public Employees Retirement System and<br>Ohio Police & Fire Pension Fund (See also HR-09-064<br>and FIN-10-49).<br><i>Revised 2020</i><br><i>Finance no longer has records after 12/31/23</i> | 60 years                                                                                               | Paper /<br>Electronic                                        |                                                         | <input type="checkbox"/>                   |



Section E: Records Retention Schedule

West Chester Township

Finance Department

(Revised Finance Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                        | (3)<br>Retention<br>Period                                                                                 | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| FIN-10-037                | <b>Semi-Annual Apportionment Of Taxes (Settlement Sheets)</b><br>Details the breakdown of the property taxes received by the Township and the origins of the funds.                                                                                                                        | 5 years<br>provided<br>audited                                                                             | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FIN-10-039                | <b>Vendor Information</b><br>Including W-9 forms, Tax Exempt Certificate, Affidavit of Compliance, Year End IRS documentation, and any other form required from vendors.                                                                                                                   | 5 years<br>or until<br>replaced                                                                            | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FIN-10-041                | <b>Year End Financial Reports</b><br>Year-end print-out with aggregate totals, Year End ledger. Documents the summary of accounts, financial receipts and expenditures normally used to monitor, manage and verify the budget and financial position of the office.                        | 15 years                                                                                                   | Paper                 |                                                         | <input type="checkbox"/>                   |
| FIN-10-042                | <b>Year End Financial Reports</b><br>Electronic records kept for reference.                                                                                                                                                                                                                | 5 years<br>and no longer<br>of<br>administrative<br>or legal value                                         | Electronic            |                                                         | <input type="checkbox"/>                   |
| FIN-13-043                | <b>OPERS Vendor Notification<br/>PEDACKN &amp; PEDREQ forms –</b><br>Notify vendors of OPERS rights and responsibilities.                                                                                                                                                                  | 5 years                                                                                                    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FIN-14-045                | <b>OPERS Non-Contributing List</b><br>Annual report of individuals providing services to the Township but not making retirement contributions                                                                                                                                              | 5 years                                                                                                    | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FIN-15-046                | <b>Tax Exempt Debt – Expenditure Records</b><br>Including but not limited to, invoices, pay apps, purchase orders, change orders for expenditures paid w/ tax exempt debt                                                                                                                  | 5 years<br>after bond<br>expires and<br>no longer of<br>legal,<br>administrative<br>or historical<br>value | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| FIN-18-047                | <b>Other Accounts Receivable Records</b><br>Checks received as payment (deposited electronically and no value after verified deposit). See also FIN-10-02                                                                                                                                  | Until no<br>longer of<br>administrative<br>value                                                           | Paper                 |                                                         |                                            |
| FIN-20-048                | <b>Credit Card Compliance</b><br>Records related to credit card compliance and monitoring. See FIN-10-013<br>Added 2020                                                                                                                                                                    | 3 years                                                                                                    | Paper /<br>Electronic |                                                         |                                            |
| FIN-20-49                 | <b>Retirement Contribution Records – Work Papers</b><br>Accumulated information used to report Ohio Public Employees Retirement System and Ohio Police & Fire Pension Fund Contributions (See also HR-09-064 and FIN-10-036)<br>Added 2020<br>Finance no longer has records after 12/31/23 | 3 years<br>provided<br>audited and<br>no longer of<br>administrative<br>value                              | Electronic            |                                                         |                                            |



**Ohio Historical Society**  
 State Archives of Ohio  
 Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
 Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township**

**Finance Department**

(Revised Finance Department Schedule approved 06/05/2020)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                               | (3)<br>Retention<br>Period                       | (4)<br>Media<br>Type | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
| FIN-20-50                 | <b>Bankruptcy Notifications</b><br>Documentation provided by the United States<br>Bankruptcy Court<br><i>Added 2020</i>           | Until no<br>longer of<br>administrative<br>value | Paper                |                                                         |                                            |
|                           | <b>Tax Exempt Certificate</b><br><i>Sales and Use Tax exemption forms supplied to<br/>vendors of township's tax exempt status</i> | 2 Years                                          | Electronic           |                                                         |                                            |

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 O.R.C



## RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

### Section A: Local Government Unit

(To complete this form online, use "tab" key to jump from box to box.)

**West Chester Township**

(local government entity)

**Community Services (Roads, Cemetery, Maintenance, Parks)**  
**(Revises Community Services Schedule approved 04/24/2018)**

(unit)

(signature of responsible official)

**Tim Franck**

(name)

**Community Services  
Director**

(title)

**5-28-2020**

(date)

### Section B: Records Commission

**West Chester Township**

Records Commission

**513-777-5900**

(telephone number)

**9113 Cincinnati Dayton Road**

(address)

**West Chester**

(city)

**45069**

(zip code)

**Butler**

(county)

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

[JWhittaker@WestChesterOH.org](mailto:JWhittaker@WestChesterOH.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.

Records Commission Chair Signature / Ann Becker, Chair, Board of Trustees

**5/26/20**

Date

### Section C: Ohio Historical Society - State Archives

Signature

Title

Date

### Section D: Auditor of State

Signature

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**

Local Government Records Archivist  
6/26/2020



**Ohio Historical Society**  
State Archives of Ohio  
Local Government Records Program

800 E. 17<sup>th</sup> Avenue  
Columbus, Ohio 43211-2497

**Section E: Records Retention Schedule**

**West Chester Township**

**Community Services (Roads, Cemetery, Maintenance, Parks)**  
(Revises Community Services Schedule approved 4/24/2018)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | (3)<br>Retention<br>Period                                                                                                                                    | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| CS-11-004                 | <b>Capital Project Control Files</b><br>Contain routine memoranda, preliminary reports, and other general documentation and records documenting assignments and the progress of projects. Note: Does not include <i>final</i> reports, which are to be retained as part of the project file (See also CS-11-05)                                                                                                                                                                                                                                                                                                                                                                                                | 1 year<br>after project is<br>closed                                                                                                                          | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| CS-11-005                 | <b>Capital Projects</b><br>Professional services relating to capital improvements and projects including design, engineering, construction, major repair, renovation or demolition of township owned structures, buildings, facilities, streets and roadways, parks, stormwater and storm drainage facilities, communications structures and other infrastructure. May include final project reports, specifications and contract documents, certificates of insurance, project-related permits and licenses issued to the township by other entities, notices to proceed and of final settlement, project pay apps, change orders, correspondence and general documentation (See also WCT-09-005, WCT-13-115) | 6 years<br>after project ends<br>and no longer of<br>legal,<br>administrative or<br>historical value<br>Apply retention<br>schedule for<br>individual records | Paper /<br>Electronic |                                                         | ✓                                          |
| CS-11-007                 | <b>Cemetery Plats</b><br>Map of township cemetery roads, with lots (ORC 517.06)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Permanent                                                                                                                                                     | Paper /<br>Electronic |                                                         | ✓                                          |
| CS-11-009                 | <b>Cemetery Receipt Records (Official Books)</b><br>Records of financial transactions for grave ownership, burials and foundations                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Permanent                                                                                                                                                     | Paper /<br>Electronic |                                                         | ✓                                          |
| CS-11-010                 | <b>Cemetery Records</b><br>Includes foundations, sales, permits to inter, burial permits and statistics                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Permanent                                                                                                                                                     | Paper /<br>Electronic |                                                         | ✓                                          |
| CS-11-017                 | <b>Inspection, Maintenance, Upkeep and Damage Records</b><br>Records documenting periodic inspection, maintenance and repairs of township facilities and property, including cemetery, ditches, right of way and others                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | 1 year<br>+ life of asset                                                                                                                                     | Paper /<br>electronic |                                                         | <input type="checkbox"/>                   |





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**Section E: Records Retention Schedule**

**West Chester Township**

**Community Services (Roads, Cemetery, Maintenance, Parks)**  
(Revises Community Services Schedule approved 4/24/2018)

(local government entity)

(unit)

| (1)<br>Schedule<br>Number | (2)<br>Record Title and Description                                                                                                                                                                                                                                                                                                                                                                    | (3)<br>Retention<br>Period                                                                                 | (4)<br>Media<br>Type  | (5)<br>For use by<br>Auditor of<br>State or<br>OHS-LGRP | (6)<br>RC-3<br>Required<br>by OHS-<br>LGRP |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| CS-11-018                 | <b>Plans and Drawings</b><br>Wide range of, plans, drawings, architectural, and engineering records depicting concepts and precise measurements needed to plan and build structures such as buildings and streets; design and construction drawings for major township projects; "as built" drawings of township facilities; various construction drawings and renderings; and other similar documents | Permanent<br>for final versions<br>Duplicates: until<br>superseded or no<br>longer needed for<br>reference | Paper                 |                                                         | ✓<br>For<br>permanent<br>copies            |
| CS-11-019                 | <b>Plans and Drawings</b><br>(See also CS-11-018)                                                                                                                                                                                                                                                                                                                                                      | Until no longer of<br>administrative<br>value                                                              | Electronic            |                                                         | <input type="checkbox"/>                   |
| CS-11-020                 | <b>Maps – Informational</b><br>Maps that are acquired from external sources and are used for township reference and informational purposes for the township or the public, such as county maps                                                                                                                                                                                                         | Until superseded<br>or no longer<br>needed for<br>reference                                                | Paper                 |                                                         | <input type="checkbox"/>                   |
| CS-11-021                 | <b>Material Safety Data Sheets (MSDS)</b><br>Employers must have a MSDS on file for each hazardous chemical they receive and use and ensure copies are readily accessible to employees in their work area. Employer must keep records of chemicals used, where they were used, and for how long [29 CFR 1910.1200]                                                                                     | Active + 30 years                                                                                          | Paper                 |                                                         | <input type="checkbox"/>                   |
| CS-11-022                 | <b>Parks Records</b><br>Historical and informational records regarding each of the township's parks such as architectural drawings, park histories, photographs, etc.                                                                                                                                                                                                                                  | Permanent                                                                                                  | Paper /<br>Electronic |                                                         | ✓                                          |
| CS-11-023                 | <b>Prevailing Wage Records</b><br>Records include but not limited to bid tabs, certified payroll reports, affidavit of compliance forms, notification to employee forms, and determination cover letter.                                                                                                                                                                                               | 2 years<br>after project ends                                                                              | Paper                 |                                                         | <input type="checkbox"/>                   |
| CS-11-024                 | <b>Project Bonds – Labor and Materials</b><br>Surety or other types of bonds kept in Capital Project file, received from contractors to guarantee payment by the contractor to workers, subcontractors and suppliers.                                                                                                                                                                                  | 6 years<br>after expiration or<br>project<br>completion,<br>whichever is later                             | Paper                 |                                                         | <input type="checkbox"/>                   |



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(local government entity)

(unit)

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|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------|-----------------------|---------------------------------------------------------|--------------------------------------------|
| CS-11-025                 | <b>Project Bonds – Performance and Payment</b><br>Surety or other types of bonds kept in Capital Project file received from contractors to guarantee performance and payments for township projects.                                                                                                                                                                                                                                                                         | 1 year<br>after project<br>completion                            | Paper                 |                                                         | <input type="checkbox"/>                   |
| CS-11-026                 | <b>Snow Removal</b><br>Includes but not limited to records of property damage, requests for service, and plowing issues                                                                                                                                                                                                                                                                                                                                                      | 2 years<br>after action<br>completed                             | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| CS-11-027                 | <b>Snow Removal, Sub-Contractor Records</b><br>Includes but not limited to contractor information sheets, route sheets, pay requests, and insurance information                                                                                                                                                                                                                                                                                                              | 2 years<br>and no<br>outstanding issues                          | Paper                 |                                                         | <input type="checkbox"/>                   |
| CS-11-028                 | <b>Surplus Property Records</b><br>Documentation of surplus township property submitted for trustee approval for disposal via resolution (See also WCT-13-116)                                                                                                                                                                                                                                                                                                               | 2 years<br>from date of<br>approval                              | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| CS-11-029                 | <b>Facility and Program Use Records</b><br>Registrations, applications and permits and schedules for the use of township facilities including but not limited to ball fields, all parks, shelters, the Muhlhauser Barn, the Cabin in the Clearing and Keehner Park Amphitheatre. Records include reservation sheets, applications, confirmation letters, permits, certificates of insurance, schedules, refund forms program and event descriptions, and other documentation | 2 years<br>after event                                           | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| CS-14-030                 | <b>Muhlhauser Barn Records</b><br>Records documenting pre and post rental activities including but not limited to tour records, key inventory sheet, same day key check out form, contracted annual cleaning form, and others                                                                                                                                                                                                                                                | 2 years                                                          | Paper /<br>Electronic |                                                         | <input type="checkbox"/>                   |
| CS-15-031                 | <b>Sub-Drivers On-Call Response Sheet</b><br>Tracking availability and call in for sub drivers for snow removal                                                                                                                                                                                                                                                                                                                                                              | Until season ends<br>and no longer of<br>administrative<br>value | Paper                 |                                                         | <input type="checkbox"/>                   |
|                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                  |                       |                                                         |                                            |



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(local government entity)

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|---------------------------|----------------------------------------------------------------------------------------------------------------|----------------------------------------------|----------------------|---------------------------------------------------------|--------------------------------------------|
|                           |                                                                                                                |                                              |                      |                                                         |                                            |
| CS-17-034                 | <b>Ohio Utility Protection Services (OUPS)</b><br>OUPS notifications / clearance for Township-related projects | 3 years                                      | Paper                |                                                         | <input type="checkbox"/>                   |
| CS-18-035                 | <b>Cartograph Work Requests and Orders</b>                                                                     | Life of asset                                |                      |                                                         | <input type="checkbox"/>                   |
| CS-18-036                 | <b>Cartograph Field Forms</b><br>Documents work performed and materials used                                   | 1 year and no longer of administrative value |                      |                                                         | <input type="checkbox"/>                   |