



RECORDS COMMISSION AGENDA:

September 19, 2023

Municipal Building 15 South College Ave. Oxford, Ohio 45056 Second Floor Conference Room

5:00 PM

Approval of Agenda

Approval of Minutes

1. Minutes from the May 2, 2023, Records Commission meeting. (Heather Barbour, Clerk of Council)

New Business

1. Proposed Records Retention Policy

Adjournment



MINUTES OXFORD RECORDS COMMISSION

Municipal Building 15 South College Ave. Oxford, Ohio 45056 Second Floor Conference Room

TUESDAY, MAY 2, 2023 AT 5:00 PM

Approval of Agenda

Members present: Doug Elliott, City Manager; Heidi Hill, Acting Finance Director; Chris Conard, Law Director; Heather Barbour, Secretary; and Brad Spurlock, Ex-Officio.

Staff present: Jessica Greene, Assistant City Manager; Amy Gabbard, Office Manager for the Police Division; and LeAnn Hendricks, Administrative Assistant for the Service Department.

Motion – To Approve the Agenda.

(Voice Vote) 1st Ms. Hill 2nd Mr. Conard

AYE # 3

NAY # 0

ABS # 0

Approval of Minutes

Motion – To Approve minutes from the December 20, 2022, meeting.

(Voice Vote) 1st Mr. Conard 2nd Ms. Hill

AYE # 3

NAY # 0

ABS # 0

1. Minutes from the December 20, 2022, Meeting

Old Business

None.

New Business

1. Approval of One-Time Obsolete Records (RC-1)
 1. Service

Motion – To Approve the Service Department RC-1 form.

(Voice Vote) 1st Ms. Hill 2nd Mr. Conard

AYE # 3

NAY # 0

ABS # 0

Mr. Elliott and the Commission briefly reviewed the requests, and the Commission had no concerns with the items slated for disposal.

2. Approval – Amended Records Retention Schedule. (RC-2)

1. Amended Records Retention Policy (Jessica Greene, Assistant City Manager)

Motion – To Approve clerical changes to the Draft Amended Records Retention Schedule (RC-2).

(Voice Vote) 1st Ms. Hill 2nd Mr. Conard

AYE # 3

NAY # 0

ABS # 0

Mr. Elliott and the Commission reviewed the City-wide Draft Records Retention Policy. Mr. Conard wished to add more definitions in the introduction and mentioned tabling until August 1, 2023.

Motion – To Table the Draft Amended Records Retention Policy.

(Voice Vote) 1st Ms. Hill 2nd Mr. Conard

AYE # 3

NAY # 0

ABS # 0

3. Approval – Certificate of Records Disposal (RC-3)

1. Clerk of Council

2. Police Division

3. Finance

Mr. Elliott and the Commission briefly reviewed the requests, and the Commission had no concerns with the items slated for disposal.

Motion – To Approve the Clerk of Council's RC-3 form.

(Voice Vote) 1st Mr. Conard 2nd Ms. Hill

AYE # 3

NAY # 0

ABS # 0

Motion – To Approve the Police Division's RC-3 form.

(Voice Vote) 1st Mr. Conard 2nd Ms. Hill

AYE # 3
NAY # 0
ABS # 0

Motion – To Approve the Finance Department's RC-3 form.
(Voice Vote) 1st Ms. Hill 2nd Mr. Conard
AYE # 3
NAY # 0
ABS # 0

Adjournment

Next Meeting: August 1, 2023. Mr. Elliott and the Commission discussed meeting quarterly while going through a major cleanup project and migrating to Office 365.

Motion – To Adjournment at 6:01 p.m.
(Voice Vote) 1st Ms. Hill 2nd Mr. Conard
AYE # 3
NAY # 0
ABS # 0



Records Retention Policy

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Introduction

This Records Retention Policy will serve as the City's Records Retention Schedule or RC-2. Changes and updates to this policy will require an RC-2. Revisions should be considered every five years. If the item on the policy has a checked box, then the Ohio History Connection (LGRP) and the State Auditor's Office must approve the RC-3 before disposal. If the item does not have a checked box, an RC-3 is required for the local Records Commission only.

When to use the RC-1 Form – One-Time Disposal of Obsolete Records used for one-time disposal or transfer of records that are no longer created or maintained by the local government and are not listed on the RC-2.

When to use the RC-2 Form – Records Retention Schedule used to document the records series that are created and how long records are retained.

When to use the RC-3 Form – Certificate of Records Disposal used to document destruction or transfer of records identified on the local government's RC-2 form.

Any records over 50 years of age require an RC-1 before disposal.

RC Forms, Instructions, and Examples can be at the [Ohio History Connection](#).

Definition

Pursuant to the Oxford Records Retention Policy, "Transient Records" contain information of short-term usefulness or value to the public office. Examples of transient records include but are not limited to, voicemail messages, telephone message slips, post-it notes, emails scheduling events, or superseded drafts of documents. Transient records do not set policy or official policy. Transient records shall be destroyed once the record is no longer of any administrative value. The Transient Records Policy is applicable to all Departments and Divisions within the City of Oxford.

City Manager

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
CM-01	General Administrative Files	All Media – Until revised, superseded, or no longer of administrative value		☐
CM-02	Interdepartmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
CM-03	Complaints	All Media – 1 year		☐
CM-04	Organizations (General Files on non-city agencies)	All Media – Until revised, superseded, or no longer of administrative value		☐
CM-05	Special Projects (Council annual goals activities)	All Media – 1 year, then review for historical value		☒
CM-06	Social Media/Website	Electronic – Until revised, superseded, or no longer of administrative value.		☐
CM-07	Press Releases	All Media – Until revised, superseded, or no longer of administrative value (review for historical value).		☐
CM-08	Weekly Reports to Council	All Media – 5 years, then destroy		☐
CM-09	Annexation	All Media – Permanent		☒
CM-10	Lawsuits	All Media – Permanent		☒
CM-11	Campaign Files (income tax and bond issues)	All Media – 5 years (review for historical value)		☒
CM-12	Request for Proposals/Bids A) Successful Proposals/Bids B) Unsuccessful Proposals/Bids	All Media – A) 8 years, after expiration then destroy		☐

		B) 2 years after letting contract, provided audited.		
CM-13	Administrative Tickets (Civil Citations) Code Compliance and Hearings A) Paid Citations/Closed Hearing B) Unpaid or Unresolved Citation Hearings	All Media – A) 3 years, then destroy B) Until Paid or Resolved + 3 years, then destroy		☐
CM-14	Training Materials for City Council and Board and Commission members	All Media – until revised, superseded, or no longer of administrative value		☐
CM-16	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒

Clerk of Council

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
CL-01	Public Records Requests	All Media – 3 years		☐
CL-02	Public Records Request log	All Media-5 years		☐
CL-03	Park and Right-of-Way permits, Requests for use of public parks and rights-of-way	All Media – 3 years		☐
CL-04	Banner permits/Requests for community event banners across High Street	All Media – 3 years		☐
CL-05	Liquor permit notices to legislative authority	All Media – 5 years		☐
CL-06	Improvement files, assessments for curb, gutter sidewalk, and driveway apron repairs	All Media – 5 years		☐
CL-07	Charter files/Charter amendment files	All Media – Permanent		☒
CL-08	Complaints/Citizen Complaints	All Media – 1 year		☐
CL-09	Utility rates, Requests for increases acceptance of increase by ordinance	All Media-Permanent		☐
CL-10	City council meeting agendas	All Media – Permanent		☒
CL-11	Minutes of council, Record of proceedings	All Media- Permanent		☒
CL-12	Oaths of Office for Elected Official	All Media – Permanent		☒
CL-13	Ordinances/Record of Legislation since 1953, Ordinances/Record of Legislation	All Media– Permanent		☒

CL-14	Resolutions, Record of Legislation since 1953	All Media – Permanent,		☒
CL-15	Index of Ordinances, Resolutions	All Media – Permanent,		☒
CL-16	Petitions/Miscellaneous petitions not filed elsewhere	All Media– 5 years		☐
CL-17	Legal Notices/Proof of Publication	All Media –5 years		☐
CL-18	Proclamations	All Media – 3 years		☐
CL-19	Recordings of meetings	All Media – until revised, superseded, or no longer of administrative value		☐
CL-20	Marriage certificates	All Media– 1 year after recorded with the County		☐
CL-21	Board and commission applications- Applicants not appointed	All Media – 2 years		☐
CL-22	Board and commission applications- Applicants appointed	All Media – 2 years after term is completed		☐
CL-23	Board and commission rosters	All Media – Until revised, superseded, or no longer of administrative value		☐
CL-24	Board and commission agendas & minutes: (Civil Rights Commission, Records Commission, Oxford Parking and Transportation Advisory Board, Public Art Commission, Climate Action Steering Committee)	All Media – Permanent		☒
CL-25	Contracts and agreements – Original signed contracts and agreements	All Media – 8 years after the expiration date		☐
CL-26	Certificate of Result of Election (Levies)	All Media – until expiration of the bond issue.		☐

CL-27	Request for Proposals/Bids A. Successful Proposals/Bids B. Unsuccessful Proposals/Bids	All Media – A. 8 years, years after expiration then destroy B. 2 years after letting contract, provided audited.		☐
CL-28	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☐

Community Development Department-Building

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
CDB-01	Building Code Books	All Media – 1 year or until superseded		☐
CDB-02	Residential Building Permits (Building, Zoning, and Other Related Permits Issued)	All Media – Permanent		☐
CDB-03	Residential Building Permit Certificate of Occupancy Including Temporary	All Media – Permanent		☐
CDB-04	Residential Building Permit Certificate of Code Compliance	All Media – Permanent		☐
CDB-05	Residential Building Permit Approved Site Plans	All Media – Permanent		☐
CDB-06	Residential Building Permit Approved Architectural Drawings	Paper – 5 years after project or permit end Electronic – Permanent		☒
CDB-07	Residential Building Permit Applications	Paper – 5 years after project or permit end Electronic – Permanent		☐
CDB-08	Residential Building Permit Inspection Tickets, Including Releases	Paper – 5 years after project or permit end Electronic – Permanent		☐
CDB-09	Residential Building Permit Misc. Permit Documentation, including payment receipts, and reviews.	Paper – 5 years after project or permit end Electronic – Permanent		☐
CDB-10	Residential Building Permit Records, including inspections, reviews, and fee payments	Electronic – Permanent		☐

CDB-11	Commercial Building Permits (Building, Zoning, and Other Related Permits Issued)	All Media – Permanent		☐
CDB-12	Commercial Building Permit Certificate of Occupancy, including Temporary	All Media – Permanent		☐
CDB-13	Commercial Building Permit Certificate of Code Compliance	All Media – Permanent		☐
CDB-14	Commercial Building Permit Approved Site Plans	All Media – Permanent		☐
CDB-15	Commercial Building Approved Architectural Drawings	All Media – Permanent		☐
CDB-16	Commercial Building Permit Applications	Paper – 5 years after project or permit end Electronic – Permanent		☐
CDB-17	Commercial Building Permit Inspection Tickets, Including Releases	Paper – 5 years after project or permit end Electronic – Permanent		☐
CDB-18	Commercial Building Permit Misc. Permit Documentation, including payment receipts, reviews.	Paper – 5 years after project or permit end Electronic – Permanent		☐
CDB-19	Commercial Building Permit Records, including inspections, reviews, and fee payment	Electronic – Permanent		☐
CDB-20	Residential Rental Permit Files, including permits, inspection tickets, applications, payment receipts.	All Media – Permanent		☐
CDB-21	Residential Rental Permit Annual Billing Notices	Paper – 2 years after renewal issued		☐
CDB-22	Residential Rental Permit Records	Electronic- Until superseded.		☐

CDB-23	Utility Connection Permits, including inspection tickets	Paper – 5 years after permit issuance		☐
CDB-24	Utility Connection Permits Issued, including fee payment	Electronic- Permanent		☐
CDB-25	Curb Gutter Sidewalk – Street Cut Permits, including inspection tickets	Paper – 5 years after permit issuance Electronic – permanent		☐
CDB-26	Curb Gutter Sidewalk – Street Cut Permit Records	Electronic – Permanent		☐
CDB-27	Housing Board of Appeals Minutes, Agendas & Exhibits	All Media – Permanent		☒
CDB-28	Housing Board of Appeals Meeting notes & recordings	All Media – Until revised, superseded, or no longer of administrative value.		☐
CDB-29	Board of Building Standards Monthly Assessment Reports, Commercial & Residential	Paper – 1 year and report filed.		☐
CDB-30	Board of Building Standards Yearly Operational Report	All Media – Permanent		☒
CDB-31	U.S. Census Bureau Monthly New Housing Report	Electronic – 1 year and report filed. – 5 years after report submission		☐
CDB-32	Interdepartmental and citizen correspondence	All Media – Until revised, superseded, or no longer of administrative value.		☐
CDB-33	Request for Proposals/Bids A. Successful Proposals/Bids B. Unsuccessful Proposals/Bids	All Media – A. 8 years, after expiration then destroy B. 2 years after letting contract, provided audited.		☐
CDB-34	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒

Community Development Department- Planning

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
CDP-01	Planning Commission Case Files, including applications, staff reports, exhibits, interoffice reviews, and notification information	All Media – Permanent		☐
CDP-02	Planning Commission Case File Records	Electronic – Permanent		☐
CDP-03	Board of Zoning Appeals Case Files, including applications, staff reports, exhibits, interoffice reviews, and notification information	All Media – Permanent		☒
CDP-04	Board of Zoning Appeals Case File Records	Electronic – Permanent		☒
CDP-05	Historical Architectural Preservation Commission Case Files, including applications, staff reports, exhibits, and interoffice reviews.	All Media – Permanent		☒
CDP-06	Historical Architectural Preservation Commission Case File Records	Electronic – Permanent		☒
CDP-07	Planning Commission Meeting Agendas and Minutes	All Media – Permanent		☒
CDP-08	Board of Zoning Appeals Meeting Agendas and Minutes	All Media – Permanent		☒
CDP-09	Historical Architectural Preservation Commission Meeting Agendas and Minutes	All Media – Permanent		☒

CDP-10	Housing Advisory Commission Meeting Minutes, Agendas, and Exhibits	All Media – Permanent		☒
CDP-11	Historic Architectural Preservation Commission- Audio Recording of Meetings	All Media – Until revised, superseded, or no longer of administrative value.		☐
CDP-12	City of Oxford Comprehensive Plans	All Media – Permanent		☒
CDP-13	Sidewalk Use Permit files, including application, insurance information, and site drawings	Paper – 3 years after expiration or permit		☐
CDP-14	Sidewalk Use Permit Records	Electronic – Permanent		☐
CDP-15	Tax Assessment- including violation notices, invoices, and property owner notification	All Media – Until revised, superseded, or no longer of administrative value.		☐
CDP-16	Tax Assessment Records	Electronic – Permanent		☐
CDP-17	Code Enforcement Property Files, including violation letters, violation door notices, field notes	All Media – Until revised, superseded, or no longer of administrative value.		☐
CDP-18	Code Enforcement Property Records	Electronic – Permanent		☐
CDP-19	Zoning and General Violation Property Files, including violation letters, photos, and field notes	All Media – Until revised, superseded, or no longer of administrative value.		☐
CDP-20	Zoning and General Violation Property Files	Electronic – Permanent		☐
CDP-21	Request for Proposals/Bids A. Successful Proposals/Bids B. Unsuccessful Proposals/Bids	All Media – A. 8 years, after expiration then destroy B. 2 years after letting contract, provided audited.		☐

CDP-22	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒
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Economic Development

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
ED-01	Interdepartmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
ED-02	Goals, Priorities, and Feasibility Studies	5 years, review for historical value		☐
ED-03	Special Projects, Council Goals, and Placemaking Activities	Until revised, superseded, or no longer a=of administrative value		☐
ED-04	Board and Commission agendas and minutes: Community Improvement Corporation, and the Student Community Relations Commission	All Media – Permanent		☐
ED-05	Community Improvement Corporation Revolving Loan Fund Policies	Term of associated contract and requirements of outside granting agencies		☐
ED-06	Community Improvement Corporation Revolving Loan Fund Applications and supporting materials	Term of associated contract and requirements of outside granting agencies		☐
ED-07	Community Development Block Grant Program administrative files	All Media – 3 years provided audited		☐
ED-08	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☐

ED-09	Request for Proposals/Bids A. Successful Proposals/Bids B. Unsuccessful Proposals/Bids	All Media – A. 8 years, after expiration then destroy B. 2 years after letting contract, provided audited.		☐

Engineering Division

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
ENG-01	Request for Proposals/Bids A. Successful Proposals/Bids B. Unsuccessful Proposals/Bids	All Media – A. 8 years, after expiration then destroy B. 2 years after letting contract, provided audited.		☐
ENG-02	Photographs	All Media – 15 years. Appraise for historical value		☐
ENG-03	Bridge Inspection Reports	All Media – Life of bridge		☐
ENG-04	Annual Report	All Media – Until revised, superseded, or no longer of administrative value		☐
ENG-05	Staff Report	All Media – Until revised, superseded, or no longer of administrative value		☐
ENG-08	Sanitary Sewer Records/Maps	All Media – Permanent until updated and replaced.		☐
ENG-09	Interdepartmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
ENG-10	Complaints	All Media – 1 year or until resolved		☐
ENG-11	Design Calculations	All Media – 3 years or until revised, superseded.		☐
ENG-12	Fire Flow Tests	All Media – 1 year or until re-tested.		☐
ENG-13	Field/Site Visit Notes	All Media – Life of project.		☐
ENG-14	Traffic Studies	All Media – Until revised, superseded, or no longer of administrative value, appraise for historical value		☐
ENG-15	Department or Project Meeting Minutes	All Media – Until revised, superseded, or no longer of administrative value		☐

ENG-16	Subdivisions Utility Drawings	All Media – Permanent or until replaced		☐
ENG-17	Sanitary Flow Engineering. Calculations	All Media – Permanent or until replaced		☐
ENG-18	Water Dist. Engineering Calculations	All Media – Permanent or until replaced		☐
ENG-19	Storm Water Management Engineering Calculations	All Media – Permanent or until replaced		☐
ENG-20	Pavement Design Eng. Calculations	All Media – Permanent or until replaced		☐
ENG-21	Bonds (Performance, Maintenance, and Public Improvement)	All Media – 5 years after project completion.		☐
ENG-22	City Owned Property Files	All Media. Permanent while owned by City.		☐
ENG-23	Federal Project Files	All Media – 10 years after project completion.		☐
ENG-24	Misc. Files	All Media – Until revised, superseded, or no longer of administrative value		☐
ENG-25	Improvements (alleys, streets, and alley & street vacations)	All Media – Permanent 1 year after the final payment and audit		☐
ENG-26	Assessment Records for public improvements	All Media – 1 year after the assessment process is complete		☐
ENG-27	Equipment Maintenance Records	All Media – Life of Equipment		☐
ENG-28	Equipment and Supplies	All Media – Life of Equip/Supply		☐
ENG-29	Utility Maps/Other Maps	All Media – Until revised, superseded, or no longer of administrative value		☐
ENG-30	Backflow Prevention Device Permit Records	Electronic-Permanent		☐
ENG-31	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☐
ENG-32	Site Development	All Media – 2 years or until revised, superseded, or no longer of administrative value		☐

ENG-33	Single Family Residence (house plans)	All Media – 2 years or until revised, superseded, or no longer of administrative value		☐
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Finance Department

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
FN-01	Annual Budget	All Media – Permanent		☒
FN-02	Annual Certificate of Estimated Resources	All Media – 7 years		☐
FN-03	Annual backup of ledgers (Appropriations, Revenue, Expenditures, Encumbrances)	All Media – 5 years provided audited		☒
FN-04	Appropriation Transfers (not requiring a supplemental budget)	All Media – 5 years		☐
FN-05	Assessment – Special Assessment Record	All Media – Until paid and audited		☒
FN-06	Audit Reports	All Media – Permanent		☒
FN-07	Bank Statements, Bank Reconciliation, Cancelled checks (checking, investments, or other bank statements)	All Media – 3 years provided audited		☐
FN-08	Bid Bond	Paper – Upon rejection or completion of the project		☐
FN-09	Request for Proposals/Bids A. Successful Proposals/Bids B. Unsuccessful Proposals/Bids	All Media – A. 8 years, after expiration then destroy B. 2 years after letting contract, provided audited.		☐
FN-10	Bond of Officials or Employees	Paper – 10 years after the termination of the officer or employee		☐
FN-11	Bond Register	All Media – Permanent		☐

FN-12	Budget Working Papers	All Media – 3 years		☐
FN-13	Annual Comprehensive Financial Report Working Papers (Schedules, Reports, Printouts, etc.)	All Media – 3 years		☐
FN-14	Cash Receipts Journal (including copies of deposit slips)	Paper – 3 years provided audited		☒
FN-15	Capital Improvement Bonds	All Media – Until paid in full and audited		☒
FN-16	Interdepartmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
FN-17	Debt Issuance Working Papers	All Media – After debt issuance & until revised, superseded, or no longer of administrative value, provided audited		☐
FN-18	Fixed Asset Records (Acquisition, transfers, disposals)	All Media – 3 years after disposal of asset.		☐
FN-19	Fixed Asset Schedules & Reports	All Media – 3 years provided audited		☐
FN-20	General Journal (memo pay-ins, memo expenses, adjustments, transfers, etc.)	All Media – 3 years provided audited		☐
FN-21	Grant Financial Files (request for funds, reports)	All Media – 3 years after end of the grant provided audit		☐
FN-22	Statement of Indebtedness	Paper – Permanent, appeals exhausted, all claims paid, provided audited		☐
FN-23	Insurance Claims for Damages Against the City	All Media – Until claim is settled & all appeals exhausted		☐
FN-24	Insurance Policies	All Media – 2 years after expiration provided all claims settled		☐
FN-25	Inventory of Equipment	All Media – Until revised and audited		☒
FN-26	Investment Reports	All Media – 3 years provided audited		☒

FN-27	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒
FN-28	Loan request for payments (OWDA), Debt payments	All Media – 3 years after final loan agreement is completed, provided audited		☒
FN-29	Monthly reports of Cash, Fund Balances, Revenue, Expenditures, and Encumbrances	All Media – 3 years provided audited		☐
FN-30	Backups of General Ledger	Electronic until superseded.		☐
FN-31	Notice of Publication of Legal Notice	All Media – 3 years		☐
FN-32	Policies	All Media – Until superseded & effective period audited		☐
FN-33	Reference Material (Publications, manuals, instructions, and other miscellaneous reference materials)	All Media – Until revised, superseded, replaced, or no longer of administrative value		☐
FN-34	Tax Settlement Reports (County Auditor)	All Media – 3 years provided audited		☐
FN-35	Year End Reports of Cash, Fund Balances, Revenue, Expenditures, and Encumbrances	All Media – 5 years provided audited		☐
FN-36	Loan & Grant Applications & Reports made to the City (Revolving Loan Fund, CDBG, and Housing Grants, etc.)	All Media – 3 years after paid in provided full, provided audited		☐
FN-37	Accounts Payable Record(check copies, pay requests, and invoices)	All Media – 3 years provided audited		☐
FN-38	Check Registers	All Media – 3 years provided audited		☐
FN-39	Encumbrances & Expenditure Journal	All Media – 7 years provided audited		☐

FN-40	Internal Service Charges/Usage (fuel and postage)	All Media – 3 years provided audited		☐
FN-41	IRS Form 1099	All Media – 7 years provided audited		☐
FN-42	IRS Form W-9 for vendors	Paper – 7 years after final payment to vendor		☐
FN-43	Travel Reimbursement Forms	All Media – 3 years provided audited		☐
FN-44	Purchase Orders (POs, requisitions, supporting documents)	All Media – 3 years provided audited		☐
FN-45	Employer's Quarterly Federal Tax Return Form 941	All Media – 6 years provided audited		☐
FN-46	Employer Paid Benefits and Payroll Cost (Invoices & reports for Workers Comp payment, quarterly pension invoices, life insurance)	All Media – 3 years provided audited		☐
FN-47	Garnishment/Child Support Order	All Media – Until employee terminated or order rescinded		☐
FN-48	IRS Form W-2	All Media – Permanent		☐
FN-49	Insurance Billing and Supporting documentation	All Media – 3 years provided audited		☐
FN-50	Payroll Check Register (detailed and summary)	All Media – Permanent		☐
FN-51	Payroll Expenditure Journal (Payroll, Medicare, FICA, Transfers, etc.)	All Media – 6 years provided audited		☐
FN-52	Police and Fire Disability & Pension Fund Record	All Media – Permanent		☐

FN-53	Public Employees Retirement System Record	All Media – Permanent		☐
FN-54	Report of Bureau of Employment Services	All Media – 6 years provided audited		☐
FN-55	Backup of Payroll software & data (annually)	Electronic – Permanent		☐
FN-56	Timesheets/Timecards Including approved leave request forms	All Media – Permanent		☐
FN-57	Withholding Payment Records (Income tax, Deferred Compensation, Credit Union, Insurance, etc.)	All Media – 6 years provided audited		☐
FN-58	Withholding authorization forms (W-4, State, Credit Union, etc.)	All Media – Until superseded or employee terminated		☐
FN-59	Accounts Receivables-Other (Compactor tickets, misc. invoices, misc. receipts, parking tickets, payment stubs, credit card payment receipts, hotel tax, returned mail)	All Media – 3 years provided audited		☐
FN-60	Bad checks and Bad debt files	All Media – 2 years after settlement		☐
FN-61	Customer account signature	All Media – Until service terminated		☐
FN-62	Daily Short/Over Reports	All Media – 3 years provided audited		☒
FN-63	SSI Reports (Meter Reading Reports)	All Media – 3 years provided audited		☒
FN-64	Receipt Journals	All Media – 3 years provided audited		☒
FN-65	Monthly Utility Billing Journal	All Media – 3 years provided audited		☒
FN-66	Past Due Reports (agreements, delinquent account statements, credit bureau, inactive,	All Media – 3 years provided audited		☒

	aging, write offs, bankruptcy notifications)			
FN-67	Refuse Service Records (invoices, PO changes, missed pickups, Rumpke bills)	All Media – 3 years provided audited		☒
FN-68	Shut-off Lists Accounts Receivable Overdue	All Media – 3 years provided audited		☒
FN-69	Utilities' Accounts Receivable Ledger Cash Batch Finals	All Media – 3 years provided audited		☒
FN-70	Utilities' Accounts Receivable Ledger Detail Open Accounts Receivable	All Media – 3 years provided audited		☒
FN-71	Utilities Adjustment Journal (documentation)	All Media – 3 years provided audited		☒
FN-72	Utility Service Orders Move out forms	All Media – 3 years after service completed provided audited		☐
FN-73	Year End Backups of BSA finance applications.	Electronic-Permanent.		☐
FN-74	Cemetery Burial Fee Receipts	3 years, provided audited		☐
FN-75	Cemetery Burial Transit Permits	5 years		☐
FN-76	Cemetery Burial Permit	Permanent		☐
FN-77	Cemetery Deposit Record- Perpetual Care	Permanent		☐
FN-78	Cemetery Deed Book	Permanent		☐
FN-79	Cemetery Index to Burial Plots	Permanent		☐
FN-80	Cemetery Minutes	Permanent		☐
FN-81	Cemetery Plat Maps	Permanent		☐
FN-82	Cemetery Record of Lot Sales	Permanent		☐
FN-83	Cemetery Register of Interments	Permanent		☐

FN-84	Cemetery Rules and Regulations	Permanent		☐
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Fire Division

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
F-01	General Administrative Files	All Media – Until revised, superseded, or no longer of administrative value		☐
F-02	Interdepartmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
F-03	Weekly Reports	All Media – Until revised, superseded, or no longer of administrative value		☐
F-04	Certification and Training Records	All Media permanent		☐
F-05	Complaints	All Media – 1 year/destroy		☐
F-06	Fire contracts with other jurisdictions	All Media – 25 years after expiration		☐
F-07	EMS Run Reports	All Media – 5 years		☐
F-08	Fire Run Reports (includes alarm response, fire investigation files, fire and loss records, master run, arson report)	All Media – Permanent		☒
F-09	Accident Files (accidents with the department apparatus/vehicles)	All Media – 2 years (provided no claim pending)		☐
F-10	Violation Notices (occupancy inspection violations)	All Media – 5 years after violation corrected		☐
F-11	Firework Permits	All Media – 5 years after expiration		☐
F-12	Equipment and Vehicle Maintenance Records (vehicles, pumps, hoses, and other apparatus, except hydrants)	All Media – Life of Equipment		☐
F-13	Annual Vehicle Inspection Report	All Media – Life of Vehicle		☐

F-14	Inspection of Structures Record (for Fire Code Violations)	All Media – Life of Structure		☐
F-15	Administrative Citations – All documentation related to process (dept. copy of citation, citation appeal, administrative hearing)	All Media – 1 year, provided no action pending		☐
F-16	Request for Proposals/Bids a. Successful proposals/bids b. Unsuccessful Proposals/Bids	All Media – a. 8 years, after expiration then destroy b. 2 years after letting contract, provided audited.		☐
F-17	Leases (equipment & other capital leases)	All Media- 6 years after expiration provided audited		☐

Human Resources Department

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
HR-01	Advertisements/Announcements	All Media – 1 year		☐
HR-02	Application/Resumes for employment	All Media – Permanent if applicant employed; others 2 years		☐
HR-03	Letter of appointment	All Media – Permanent		☐
HR-04	Pre-employment medical/police/psychological information	All Media – Permanent if applicant employed; others 2 years		☐
HR-05	Pension enrollment record	All Media – Permanent		☐
HR-06	Employment performance evaluation	All Media – Permanent		☐
HR-07	Personnel action forms (including pay increases)	All Media – Permanent		☐
HR-08	Record of disciplinary action	All Media – Permanent (unless expunged)		☐
HR-09	Letter of resignation/retirement	All Media – Permanent		☐
HR-10	Personnel Appeals Board Rules and Regulations	All Media – Permanent or until superseded		☐
HR-11	Employee Handbook	All Media – Permanent or until superseded		☐
HR-12	Human Resources Policies and Procedures	All Media – Permanent or until superseded		☐
HR-13	Job Descriptions/Classification Specifications	All Media – Permanent or until superseded		☐
HR-14	Agendas & Minutes of Personnel Appeals Board	All Media - Permanent		☐
HR-15	Classified Positions List	All Media – Permanent or until superseded		☐
				☐

HR-16	Classified Exam Files/Protocols	All Media – Permanent or until superseded		
HR-17	Eligibility Lists	All Media – 1 year, unless extended by PAB.		☐
HR-18	Interdepartmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
HR-19	Request for Proposals/Bids a. Successful Proposals/Bids b. Unsuccessful Proposals/Bids	All Media – a. 8 years, then destroy b. 2 years after letting contract, provided audited.		☐
HR-20	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒
	LABOR RELATIONS			☐
HR-21	Labor Union Contracts	All Media – Permanent		☐
HR-22	Compensation studies conducted for the City of Oxford	All Media – 5 years		☐
	EQUAL EMPLOYMENT			☐
HR-23	Equal Employment Opportunity Commission complaint case files	All Media – Permanent		☐
HR-24	Equal Employment Opportunity Commission reports to the State	All Media – 7 years		☐
	SAFETY RECORDS			☐
HR-25	Accident Reports	All Media – 2 years, provided no claims pending		☐
HR-26	Worker's Compensation Case Files	All Media – 10 years after date final payment		☐
HR-27	Third Party Administrator (TPA) reports	All Media – 2 years		☐
HR-28	Public Employment Risk Reduction Program- Form 300AP Summary Report (injuries/illnesses)	All Media – 5 years		☐

HR-29	Public Employment Risk Reduction- Form 300P log of injuries and illnesses	All Media – 5 years		☐
HR-30	Employee training documentation	All Media – Permanent		☐
HR-31	HR Legal Opinions HR Legal Opinions	All Media – Permanent		☐
HR-32	Medical/Life Insurance contracts	All Media – 15 years		☐
HR-33	Wellness reports	All Media – 2 years		☐
HR-34	Benefits Summaries	All Media – until superseded.		☐
HR-35	Benefits & Insurance enrollment and change forms	All Media – Until revised, superseded, or no longer of administrative value		☐

Management Information Systems

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
MIS-01	Computer Inventory	All Media – Life of Equipment		☐
MIS-02	Auction Inventory	All Media – 3 years Destroy		☐
MIS-03	Computer Use Policy	All Media – Until Superseded		☒
MIS-04	Information Systems Backup Files (These files are maintained solely for business continuity and disaster recovery purposes and should not be maintained as a historical archive of the information system.) 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.	Off site and Electronic – Until Superseded Off site and Electronic – Destroy		☐
MIS-05	Email Backup/Archive Files (All incoming and outgoing emails are archived on a separate server for regulatory compliance. Beyond this, individual users are expected to retain their email as per their approved retention schedules and City email policy.)	Electronic – Retain current 5 years destroy		☐
MIS-06	Help Desk Logs and Reports	All Media – 1 year destroy		☐

	(Consists of records used to document requests for technical assistance and responses to these requests, as well as to collect information on the use of computer equipment to compile monthly and annual statistics, and for reference for planning, management analysis, and other administrative purposes.)			
MIS-07	General/ Routine Correspondence	All Media – Until revised, superseded, or no longer of administrative value.		☐
MIS-08	Request for Proposals/Bids a. Successful Proposals/Bids b. Unsuccessful Proposals/Bids	All Media – a. 8 years, then destroy b. 2 years after letting contract, provided audited.		☐
MIS-09	Voice Mail Messages	All Media – Until revised, superseded, or no longer of administrative value		☐
MIS-10	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒

Oxford Parks and Recreation Department

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
OPRD-01	OPRD User Accident Reports	Paper – 2 years, provided no claim pending		☐
OPRD-02	Activity/Registration Reports	Electronic – permanent		☐
OPRD-03	Agreements and Event Documents (sporting events, events, senior center, etc.)	All Media – Until revised, superseded, or no longer of administrative value		☐
OPRD-04	Bank Deposit Record	Paper – Until revised, superseded, or no longer of administrative value		☐
OPRD-05	Interdepartmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
OPRD-07	Equipment Maintenance Records	Paper – life of equipment		☐
OPRD-08	Equipment Manuals	All Media – Life of Equipment		☐
OPRD-09	Maps and Plans of Park Property	All Media – Permanent		☒
OPRD-10	Meeting Agendas & Minutes (Parks & Recreation Board)/Rec. Board	All Media – Permanent		☒
OPRD-11	Monthly Report	All Media – Until revised, superseded, or no longer of administrative value		☐
OPRD-12	Safety Data Sheets (chemical list for building cleaning and maintenance)	Paper – Until Superseded		☐

OPRD-13	Preschool State Licensing info & forms (participant, enrollment, sign in/out, accident forms, etc.)	All Media – 2 years		☐
OPRD-14	Project Files (Building & Grounds)	All Media – 15 years after completion		☐
OPRD-15	Scholarship Applications and Awards	All Media – 2 years		☐
OPRD-16	Shelter/Pool/Senior Center/TRI Gym/Gazebo/Field Permit Reservations	All Media – 5 years		☐
OPRD-17	Swimming Pool Pass Information	All Media – 5 years		☐
OPRD-18	Swimming Pool and Facility Use Records)	All Media – 3 years		☐
OPRD-19	Team Rosters and Score Books Team Rosters and Score Books (team rosters and team sheets for coaches. They are turned in at the end of the season)	Paper – 2 years		☐
ORPD-20	Request for Proposals/Bids a. Successful Proposals/Bids b. unsuccessful Proposals/Bids	All Media – a. 8 years, after expiration then destroy b. 2 years after letting contract, provided audited.		☐
ORPD-21	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒

Police Division

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
PD-01	Administrative Citations – All documentation related to process (dept. copy of citation, citation appeal, administrative hearing)	All Media – 1 year, provided no action pending		☐
PD-02	Administrative Reports – Includes quarterly and annual agency performance reports, time-sensitive performance activity reports, and formal reports on agency activities	All Media – 3 years, after report is submitted		☐
PD-03	AED Event Summary – Documents when an AED is attempted or actually used on a patient	All Media – 2 years		☐
PD-04	Arrest Record Data – Adult	All Media – Permanent		☒
PD-05	Attendance Sheet – Log of time in/out for employees used for payroll purposes	All Media – 3 years		☐
PD-06	Auction – Paperwork, property cards, etc. concerning police auction	All Media – 3 years		☐
PD-07	Automated License Plate Readers – Records documenting queries run by the ALPR through the LEADS/NCIC database, including digital license plate images	All Media – 1 year, provided no action pending		☐
PD-08	Breath Testing Records – Records documenting the use of a Breath	All Media – 3 years		☐

	Testing Device to estimate the blood alcohol content from a breath sample			
PD-09	Canine Training Reports/Records – Daily and monthly training records	All Media – 2 years after canine retired		☐
PD-10	Canine Use Reports – Records of each occasion in which the canine is deployed	All Media – 2 years after canine retired		☐
PD-11	Community Service Programs – Files relating to programs within the community or schools undertaken by the department which may relate to crime prevention, safety, drugs, and education	All Media – Until revised, superseded or no longer of administrative value		☐
PD-12	Crash Reports – Fatal crash report & attachments	All Media – Permanent		☐
PD-13	Crash Reports – Property damage & Injury crash reports & attachments	All Media – 10 years, provided no action pending		☐
PD-14	Damaged/Missing Equipment & Vehicle Accident Report	All Media – 1 year		☐
PD-15	Display of Force Reports – Reports and computerized logs of officers who have been involved in an incident requiring the display of force	All Media – 5 years		☐
PD-16	Drafts and Informal Notes – Consisting of transitory information used to prepare the official record in any form	All Media – Until revised, superseded or no longer of administrative value		☐
PD-17	Facsimile Logs/Cover Sheets/Confirmation Notices	All Media –Until revised, superseded or no longer of administrative value		☐

PD-18	Field Training Report	All Media – Daily Report – 1 year Weekly Report – 1 year Summary Report – Until employee separates from employment		☐
PD-19	Fingerprint Cards	Electronic – Until data transmitted to State & Regional database		☐
PD-20	Firearms Qualification Report	All Media – Until employee separates from employment		☐
PD-21	Firearms Records/Inventories – Records documenting the assignment, location, sale, transfer, or destruction of duty weapons	All Media – 3 years		☐
PD-22	General Orders – Official statements of policy, operating procedure, and standards	All Media – Until revised, superseded or no longer of administrative value		☐
PD-23	Grant Files/Records – Records relating to the development of grant proposals to state or federal agencies and the administration of grant awards and programs	All Media – 5 years,		☐
PD-24	Internal Affairs Investigations – Records documenting founded and unfounded complaints received from the public or personnel against sworn or civilian personnel	All Media – Action Taken: Permanent; No Action Taken: 2 years		☐
PD-25	Jail Inmate Records – Medical Screening Form, Incarceration Log,	All Media – 6 years		☐

PD-26	Jail Inspection Log – Daily/weekly log used to verify inspections have been conducted in the jail to ensure the facility's safety equipment is in proper working order and all areas of the jail are secure	All Media – 3 years		☐
PD-27	Junk Motor Vehicles – All information on motor vehicles which have been impounded by the division and have been unclaimed by owner	All Media – 2 years after sale or other disposition		☐
PD-28	Juvenile Arrest Records	All Media – Until expungement order received from court		☐
PD-29	Law Enforcement Automated Data System Newsletters	Paper – Current year plus three		☐
PD-30	Law Enforcement Automated Data System CCH Transactions	Paper – 6 years		☐
PD-31	Law Enforcement Automated Data System Monthly Validation Papers	Paper – 1 year		☐
PD-32	Law Enforcement Automated Data System Audit Records	Paper – 1 year and then until revised, superseded or no longer of administrative value		☐
PD-33	Lockout Waivers – Signed waiver of liability from owner/driver of vehicle to gain entry into locked vehicle	Paper – 2 years		☐
PD-34	Misdemeanor Citations – Department copy of citation and any statements of facts associated with a misdemeanor	All Media – 3 years		☐
PD-35	Incident Reports/Offense Reports/Criminal Case files – (except Homicide & Sexual Assault files)	All Media – 10 years, provided no action pending		☐

PD-36	Offense Reports/Criminal Case files – Homicide	All Media – Permanent		☐
PD-37	Offense Reports/Criminal Case files – Sexual Assault files	All Media – 30 years after report is submitted		☒
PD-38	Overtime Log	Electronic – 2 years		☐
PD-39	Parking Citations – Department copies of citations issued for illegal parking	All Media – 3 years from date of resolution		☐
PD-40	Parking Citation Appeals	All Media – 3 years from date of resolution		☐
PD-41	Parking Immobilization Records – impound statements, “boot” notices	All Media – 3 years from date of resolution		☐
PD-42	Parking Reports – Statements of account, inventories, Residential Parking Permits, Parking Garage Lease records, collection reports, monthly reports	All Media – 3 years		☐
PD-43	Personnel Orders	All Media – Until revised, superseded or no longer of administrative value		☐
PD-44	Procedural Orders – Official statements of policy, operating procedure, and standards	All Media – Until revised, superseded or no longer of administrative value		☐
PD-45	Property Room – Record of all impounded property or evidence and paperwork recording disposition/destruction of same	All Media – 3 years after disposal of property		☐
PD-46	Radar/Laser/Speed Measuring Devices Calibration and Maintenance Logs	All Media – 1 year after unit taken out of service		☐

PD-47	Ride Along Forms – Records documenting approved or denied requests from the public or civilian personnel to accompany law enforcement personnel on patrol	All Media – 2 years		☐
PD-48	Shift Trade Request/Time Off Request	All Media – 1 year		☐
PD-49	Special Orders	All Media – Until revised, superseded or no longer of administrative value		☐
PD-50	Taser Weapon Summary – AFID tracking system and data port firing log download	All Media – 3 years after audit		☐
PD-51	Telephone Audio Recordings	All Media – 1 year, erase and reuse, provided no action pending		☐
PD-52	Tow Sheets – Records documenting the reason for the tow, arrest or accident, including vehicle information, vehicle contents, and storage location	All Media – 3 years		☐
PD-53	Traffic Citations – Department copies of traffic tickets issued to traffic violators and statements of facts	All Media – 3 years		☐
PD-54	Training Records – Records documenting the continued education and training of sworn and civilian personnel	All Media – Until employee separates from employment		☐
PD-55	Use of Force Reports – Reports and computerized logs of officers who have been involved in an incident requiring the use of force	All Media – 5 years		☐

PD-56	Vacant House Checks – Records documenting requests from citizens for visual or walk-around checks of a residence and its property, and the completion of those checks	All Media – 30 days after owner returns		☐
PD-57	Vehicle Maintenance Records	All Media – Until vehicle is sold or otherwise removed from inventory		☐
PD-58	Warrants, Summonses, or Subpoenas	Paper – Until served, discharged, answered, or withdrawn		☐
PD-59	Work Schedule	All Media – 2 years		☐
PD-60	Body Worn Camera recordings – ARREST/CITATION	Electronic – 1 year		☐
PD-61	Body Worn Camera recordings – ASSIST/ADVISE/WARN	Electronic – 1 year		☐
PD-62	Body Worn Camera recordings – INCIDENT REPORT – NO ARREST	Electronic – 1 year		☐
PD-63	Body Worn Camera recordings – NOT EVIDENCE – INCIDENTAL CONTACT	Electronic – 1 year		☐
PD-64	Body Worn Camera recordings – TRAFFIC CITATION	Electronic – 1 year		☐
PD-65	Body Worn Camera recordings – UNCATEGORIZED	Electronic – permanent		☐
PD-66	Body Worn Camera recordings – USE OF FORCE – NO ARREST	Electronic – 1 year		☐
PD-67	Body Worn Camera recordings – PERMANENT RETENTION the recording was initially classified by an officer in another category that would	Electronic –permanent		☐

	result in eventual destruction in accordance with records retention policy. The recording, however, should be permanently retained due to the nature of the incident(i.e., homicide)			
PD-68	Body Worn Camera recordings – RESTRICTED Command level access only. Used for recordings that may be part of a possible internal investigation.	Electronic – permanent		☐
PD-69	Body Worn Camera recordings – TRAINING	Electronic – 15 days		☐
PD-70	Body Worn Camera recordings – UNINTENTIONAL RECORDING	Electronic – 45 days		☐
PD-71	Body Worn Camera recordings – CIVIL CITATION	Electronic – 1 year		☐
PD-72	Body Worn Camera recordings – OH-1/TRAFFIC CRASH	Electronic – 1 year		☐
PD-73	Body Worn Camera recordings – PARKING CITATION	Electronic – 1 year		☐
PD-74	Body Worn Camera Report – Form used to document failed, interrupted, or terminated recordings, as well as audits, requests for deletion, maintenance requests, and reviews for training.	All Media – 3 years		☐
PD-75	Solicitor Permits	All Media – 1 year		☐
PD-76	Meter Rental	All Media– 1 year		☐

PD-77	72-hour Parking Log	Paper – 1 year		☐
PD-78	Weather Siren Assignments	Electronic – 1 year		☐
PD-79	Citizen Observer Patrol Intern logs	Paper – 1 year		☐
PD-80	Public Safety Cadets attendance sheets	Paper – 1 year		☐
PD-81	Posts, comments, and messages from Facebook, Instagram, Twitter, and other social media platforms	Electronic – Until revised, superseded or no longer of administrative value		☐
PD-82	Unmanned Aircraft System (drone) video or images considered investigatory work product	Electronic – Incorporated into case file and retained accordingly		☐
PD-83	Unmanned Aircraft System administrative documents – flight log, pre-flight checklist, maintenance log, annual report, etc.	All Media – 2 years		☐
PD-84	Unmanned Aircraft System (drone) video or images considered non-investigatory work product	Electronic – Until revised, superseded or no longer of administrative value		☐
PD-85	Request for Proposals/Bids a. Successful Proposals/Bids b. Unsuccessful Proposals/Bids	All Media – a. 8 years, after expiration then destroy b. 2 years after letting contract, provided audited.		☐
PD-86	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒
PD- 87	Public Records Release Log	All Media – 1 Year		☐

Service Department/Streets & Maintenance Division

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
SM-01	Inter-Departmental and Citizen Correspondence	All Media – Until revised, superseded, or longer of administrative value		☐
SM-02	Gasoline & Diesel Tank Measure Records	All Media – 2 years		☐
SM-03	Gasoline & Diesel Usage Records	All Media – 2 years provided audited		☐
SM-04	City Garage Inventory	All Media – 2 years provided audited		☐
SM-05	Material Safety Data Sheets	All Media – Until superseded		☐
SM-06	Monthly Reports	All Media – 1 year. Until incorporated in annual report		☐
SM-07	Office Equipment Operation manuals	All Media – Life of equipment		☐
SM-08	Rumpke Container Delivery Slips	All Media – 3 years		☐
SM-09	Salt Delivery Information	All Media – 3 years		☐
SM-10	Service Requests, Completed	All Media – 3 years		☐
SM-11	Traffic Control Interoffice Memos	All Media – Until revised, superseded, or longer of administrative value		☐
SM-12	Quotes for projects under \$50K	All Media – 2 years		☐
SM-13	Transfer Station Ticket stubs	All Media – 3 years		☐
SM-14	Vehicle and Equipment Information (repair manuals & parts lists)	All Media – Life of Equipment		☐
SM-15	Vehicle Maintenance and Repair Records	All Media – Life of Equipment		☐
SM-16	Annual Report	All Media – Until revised, superseded, or longer of administrative value		☐

SM-17	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☒
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Department/Division: Service Department/Wastewater Collection

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
WWC-01	Monthly Reports	All Media – Until revised, superseded, or longer of administrative value		☐
WWC-02	Manhole Inspection Reports	All Media – 5 years		☐
WWC-03	Collection System Service Reports	All Media – 3 years		☐
WWC-04	Inter-Departmental and Citizen Correspondence	All Media – 3 years		☐
WWC-05	Staff Meeting Reports	All Media – 1 year until included in the annual report		☐
WWC-06	Service Inspection Video	All Media – Until superseded		☐
WWC-07	Sanitary Maps and Plans	All Media – Until revised, superseded or no longer of administrative value		☐
WWC-08	Pump Station Monthly Reports	All Media – 10 years		☐
WWC-09	Annual Report	All Media – Until revised, superseded or no longer of administrative value		☐
WWC-10	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☐
WWC-11	Request for Proposals/Bids a. Successful Proposals/Bids b. Unsuccessful Proposals/Bids	All Media – a. 8 years, after expiration then destroy b. 2 years after letting contract, provided audited.		☐

Service Department/Wastewater Treatment Division

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
WWTP-01	Annual Report	All Media – Until revised, superseded, or no longer of administrative value		☐
WWTP-02	Inter-Departmental and Citizen Correspondence	All Media – Until revised, superseded, or no longer of administrative value		☐
WWTP-03	Field Books	All Media – Permanent		☐
WWTP-04	Wastewater Maps, Plans, Drawings	All Media – Until revised, superseded, or no longer of administrative value		☐
WWTP-05	Monthly Reports (Departmental)	All Media – Until revised, superseded, or no longer of administrative value		☐
WWTP-06	Project Files	All Media – Until completed and final issue reported		☐
WWTP-07	Project Final Reports	All Media – Permanent, 15 years, or until revised, superseded, or no longer of administrative value		☐
WWTP-08	Special Sewer Authorizations	All Media – Permanent		☐
WWTP-09	Analytical Data Sheet for Water Pollution Control Facility	All Media – 10 years		☐
WWTP-10	Daily Laboratory Testing Records	All Media – 5 years		☐
WWTP-11	Equipment Maintenance Records	All Media – Life of equipment		☐
WWTP-12	Flow Charts	All Media – 5 years		☐
WWTP-13	Monthly Lab Testing Summaries	All Media – 5 years		☐
WWTP-14	Operating Logs	All Media – 10 years		☐
WWTP-15	Record of Chemical Analysis	All Media – 10 years		☐
WWTP-16	Employee Licensing	All Media –during term of employment		☐
WWTP-17	Monthly Statistical Reports	All Media – Permanent, 3 years, or until revised, superseded, or no longer of admin. value		☐

WWTP-18	OEPA Monthly Reports	All Media – Permanent, 3 years, or until revised, superseded, or no longer of admin. value		☐
WWTP-19	OEPA Sludge Disposal Records	All Media – Permanent, 3 years, or until revised, superseded, or no longer of admin. value		☐
WWTP-20	OEPA Monthly Sludge Reports	All Media – Permanent, 3 years, or until revised, superseded, or no longer of admin. value		☐
WWTP-21	Monthly Process Reports	All Media – Permanent, 3 years, or until revised, superseded, or no longer of admin. value		☐
WWTP-22	Contracted Chemical Analysis	All Media – Permanent, 3 years, or until revised, superseded, or no longer of admin. value		☐
WWTP-23	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☐
WWTP-24	Request for Proposals/Bids a. Successful proposals/bids b. Unsuccessful Proposals/Bids	All Media – A. 8 years, after expiration then destroy B. 2 years after letting contract, provided audited.		☐

Service Department/Water Distribution Division

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
WD-01	Annual reports	All Media – Until revised, superseded, no longer of administrative value		☐
WD-02	Complaints	All Media – 1 year after resolution		☐
WD-03	Inter-Departmental and Citizen Correspondence	All Media – Until no longer of administrative value		☐
WD-04	Project Files/Plans	All Media – Until project is complete and final report issued		☐
WD-05	Project Final Reports	All Media – Permanent		☐
WD-06	Water Main Location Records	All Media – Permanent		☐
WD-07	Bacterial Analysis Records	All Media – 10 years		☐
WD-08	Monthly Reports	All Media – Until revised, superseded, no longer of administrative value		☐
WD-09	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☐
WD-10	Request for Proposals/Bids a. Successful Proposals/Bids b. Unsuccessful Proposals/Bids	All Media – A. 8 years, after expiration then destroy B. 2 years after letting contract, provided audited.		☐

Service Department/Water Treatment Division

Schedule Number	Record Title and Description	Retention Period by Media Type	For use by Auditor of State or LGRP	RC-3 Required
WTP-01	Annual Reports	All Media – Until revised, superseded, or longer of administrative value		☐
WTP-02	Inter-Departmental and Citizen Correspondence	All Media – Until revised, superseded, or longer of administrative value		☐
WTP-03	Water Treatment Maps, Plans, Drawings	All Media – Permanent, 3 years or Until revised, superseded, or longer of administrative value		☐
WTP -04	Equipment Manuals	All Media – Life of Equipment		☐
WTP-05	Employee Activity Reports	All Media – 2 years		☐
WTP-06	Daily Ledger	All Media – 3 years		☐
WTP-07	Monthly Statistical Reports	All Media – Permanent, 2 years		☐
WTP-08	Project Files	All Media – 15 years after completion		☐
WTP-09	Project Final Report	All Media – Permanent		☐
WTP-10	OEPA Monthly Reports	All Media – Permanent, 5 years		☐
WTP-11	Charts	All Media – Permanent, 5 years		☐
WTP-12	Monthly Process Reports	All Media – Permanent, 5 years		☐
WTP-13	Quality Control Charts	All Media – Permanent, 5 years		☐
WTP-14	Monthly Process Reports	All Media – Permanent		☐
WTP-15	Contracted Chemical Analysis	All Media – Permanent		☐
WTP-16	Work Schedules	All Media – 3 years		☐
WTP-17	Chain of Custody Records	All Media – 1 year		☐
WTP-18	WTP Operational Manuals	All Media – Until incorporated in annual report		☐
WTP-19	Equipment Maintenance Records	All Media – Life of Equipment		☐
WTP-20	Material Safety Data Sheet	All Media – Until Superseded		☐
WTP-21	Property Inventories	All Media – Until Superseded		☐

WTP-22	OEPA Permits	All Media – Permanent		☐
WTP-23	Leases (equipment & other capital leases)	All Media – 6 years after expiration provided audited		☐
WTP-24	Request for Proposals/Bids A. Successful Proposals/Bids B. Unsuccessful Proposals/Bids	All Media – a. 8 years, after expiration then destroy b. 2 years after letting contract, provided audited.		☐