

## January 2026 Records Retention Schedule – Summary of Changes

- ADM-016 Meeting Room Applications are electronic only
- ADM-030 Library Usage Statistics are electronic only
- CIR-001 Circulation Manual is electronic only
- CIR-002 All Circulation Records and Reports are electronic only
- CIR-004 All Monthly Circulation Statistics are electronic only
- HR-002, -003, -007 are electronic copies only
- HR-016 paper copies only
- HR-004 is COBRA reports; Duplicate ADM-033 COBRA deleted
- Added new record: HR-017 ADA Grievance Forms/Communications

Records schedule numbers updated upon deletion of ADM-033

All records re-organized to categorize by type



State Archives of Ohio  
 Local Government Records Program  
 800 E. 17<sup>th</sup> Avenue  
 Columbus, OH 43211-2474

## RECORDS RETENTION SCHEDULE (RC-2) – Part 1

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

### Section A: Local Government Unit Chillicothe & Ross County Public Library

_____	Cassie Stout	Chief Fiscal Officer	_____
(signature of responsible official)	(name)	(title)	(date)

### Section B: Records Commission

#### Chillicothe & Ross County Public Library Records Commission

PO Box 185 140 S. Paint St. Chillicothe 45601 Ross County

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

**cstout@crpl.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.

_____	Date
Records Commission Chair Signature	

### Section C: Ohio History Connection – State Archives

_____	_____	_____
Signature	Title	Date

### Section D: Auditor of State

_____	_____	_____
Signature	Title	Date

*Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission*

*retain a permanent copy of this form*

## RECORDS RETENTION SCHEDULE (RC-2) – Part 2

### Chillicothe & Ross County Public Library

#### ADMINISTRATIVE

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
ADM-001	Accident/Incident Reports	5 years	Paper/ Electronic		
ADM-002	Annual Report to State Library of Ohio	Permanent	Paper/ Electronic		
ADM-003	Bids & Specifications (Accepted & Rejected)	Accepted: 15yrs Rejected: 3yrs	Paper		
ADM-004	Blueprints & Plans for Completed Projects	Life of Structure	Paper		
ADM-005	Board Policies	Until Superseded	Paper/ Electronic		
ADM-006	Building Project Records & Specifications	Life of Structure	Paper/ Electronic		
ADM-007	Consultant Reports	4 years	Paper/ Electronic		
ADM-008	Correspondence – Memos/Letters/Emails/Etc.	UNLAV	Paper/ Electronic		
ADM-009	Correspondence – Transitory (Phone Messages, Post-it Notes, etc.)	UNLAV	Paper/ Electronic		
ADM-010	Equipment Records (HVAC, Elevator, Autos, Copiers, Generator, Etc.)	3 or until eqpt is no longer owned	Paper/ Electronic		
ADM-011	Flyers, Bookmarks, Program Announcements	UNLAV	Paper/ Electronic		
ADM-012	Legal Opinions	Permanent	Paper/ Electronic		
ADM-013	Library Publications	UNLAV	Paper/ Electronic		
ADM-014	Litigation Records	5 yrs after case closed/appeals exhausted	Paper		
ADM-015	Long Range Plan	Permanent	Paper/ Electronic		
ADM-016	Meeting Room Applications	UNLAV	Electronic		
ADM-017	Operating Procedures	Until superseded	Paper/ Electronic		
ADM-018	Organizational Charts	Until superseded	Paper/ Electronic		

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
ADM-019	Policies (HR, Board, Meeting Room, Vehicle, Credit Card, Cell Phone, Etc.)	Until superseded	Paper/ Electronic		
ADM-020	Public Records Requests	2 years	Paper/ Electronic		
ADM-021	Public Relations News Releases, Records, Reports, & Letters	UNLAV	Paper/ Electronic		
ADM-022	Sign-Up Logs for Library Services (Computer Use, Programs, Etc.)	UNLAV	Paper/ Electronic		
ADM-023	Staff Schedules	1 year	Paper/ Electronic		
ADM-024	Technology Plan	Permanent	Paper/ Electronic		
ADM-025	Video Surveillance Records	1 month	Electronic		
ADM-026	Committee Meeting Minutes (Internal Library)	2 years	Paper/ Electronic		
ADM-027	Photos	UNLAV	Paper/ Electronic		
ADM-028	Department Management Records & Reports	UNLAV	Paper/ Electronic		
ADM-029	Patron Program Registrations and Information Requests	UNLAV	Paper/ Electronic		
ADM-030	Library Usage Statistics	2 years	Electronic		
ADM-031	Employee Wellness Program Records	UNLAV	Paper/ Electronic		
ADM-032	Cell Phone Records/Logs	2 years; provided audited	Paper		
ADM-033	Jury Duty Records	5 years	Paper		
ADM-034	Safety Inspections	5 years	Paper/ Electronic		
ADM-035	OH State Empl. Relations Board Reports	5 years	Paper		
ADM-036	OPERS Independent Contractor Determination	Permanent	Paper		

## CIRCULATION

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
CIR-001	Circulation Manual	Until Superseded	Electronic		
CIR-002	Circulation Records & Reports	UNLAV	Electronic		
CIR-003	Library Materials Inventories	Until superseded	Paper/ Electronic		
CIR-004	Monthly Circulation Statistics	Until incorporated into year-end report	Electronic		
CIR-005	Patron Library Card Records	3 years or until superseded	Electronic		

## FINANCE

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
FIN-001	Accounting Computer System Backups	Until Superseded	Electronic		
FIN-002	Accounting Computer System Backups (Yearly)	Permanent	Electronic		
FIN-003	Accounting Records – Not Specified	4 years; provided audited	Paper/ Electronic		
FIN-004	Annual Financial Report to State Auditor	Permanent	Paper/ Electronic		
FIN-005	Appropriations (Annual/Supplemental/Amended Certificates)	Permanent	Paper/ Electronic		
FIN-006	Audit Reports	5 years; provided audited	Paper/ Electronic		
FIN-007	Bank Deposit Receipts	5 years; provided audited	Paper		
FIN-008	Bank Depository Agreements	4 years after expiration	Paper		
FIN-009	Bank Statements	5 years; provided audited	Paper		
FIN-010	Board of Trustees Meeting Agenda & Packets	1 year	Paper		
FIN-011	Board of Trustees Meeting Minutes	Permanent	Paper/ Electronic		
FIN-012	Board of Trustees Monthly Financial Report	5 years	Paper/ Electronic		
FIN-013	Budgets Filed with County Budget Commission	10 years; provided audited	Paper/ Electronic		

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
FIN-014	Cancelled Checks	5 years; provided audited	Paper/ Electronic		
FIN-015	Check Registers	5 years; provided audited	Paper/ Electronic		
FIN-016	Committee Meeting Minutes (Board of Trustees)	Permanent	Paper/ Electronic		
FIN-017	Contracts	15 years after expiration	Paper/ Electronic		
FIN-018	Deeds (Property)	Permanent	Paper		
FIN-019	Employee Bonds	5 years after expiration	Paper		
FIN-020	Employee Personnel Files (Non-OPERS/Non-Payroll)	2 years after inactive	Paper		
FIN-021	Employee Withholding Requests	Until replaced or revoked	Paper		
FIN-022	Federal, State, and City Income Tax Report	25 years	Paper/ Electronic		
FIN-023	Fixed Asset Inventories	Until superseded	Paper/ Electronic		
FIN-024	Grant Files	5 yr min.; provided audited. May require longer retention.	Paper/ Electronic		
FIN-025	Health Reimbursement Account Records	4 years	Paper/ Electronic		
FIN-026	Insurance Policies	2 yrs after expiration & claims settled	Paper		
FIN-027	Investment Records	4 years; provided audited	Paper/ Electronic		
FIN-028	Leases	5 years after expiration	Paper/ Electronic		
FIN-029	OH Bureau of Empl. Services Reports	5 years	Paper/ Electronic		
FIN-030	OPERS Reports & Files	50 years	Paper/ Electronic		
FIN-031	Payroll Garnishments	5 years after termination	Paper		
FIN-032	Payroll Registers	Permanent	Paper/ Electronic		
FIN-033	Payroll Reports: Monthly/Quarterly/Yearly	Permanent	Paper/ Electronic		
FIN-034	Payroll Withholding Records	4 years	Paper		
FIN-035	Petty Cash Records	5 years	Paper/ Electronic		
FIN-036	Prevailing Wage Records	4 years after audited	Paper		

<b>(1) Schedule Number</b>	<b>(2) Record Title and Description</b>	<b>(3) Retention Period</b>	<b>(4) Media Type</b>	<b>(5) For use by Auditor of State or LGRP</b>	<b>(6) RC-3 Required by LGRP</b>
FIN-037	Receipt and Revenue Ledgers	Permanent	Paper/ Electronic		
FIN-038	Time Cards, Vacation/Sick Leave Records	4 years after audited	Paper/ Electronic		
FIN-039	W-2 Forms	6 years; provided audited	Paper/ Electronic		
FIN-040	W-4 Forms	Until superseded	Paper		
FIN-041	Warrants/Vouchers/ Invoices/ Purchase Orders	5 years after audited	Paper/ Electronic		
FIN-042	Workers' Compensation Files & Reports	Permanent	Paper/ Electronic		
FIN-043	Vender Information Lists & Reports	2 years	Paper/ electronic		
FIN-044	Daily Fine, Sales, and Receipt Log	Until month-end balancing	Paper		
FIN-045	Bank Transfer Reports	Until bank stmt reconciliation	Paper		
FIN-046	Credit Card Machine Reports	2 years; provided audited	Paper		
FIN-047	Employee Direct Deposit Records	Until Superseded	Paper		
FIN-048	Bequest Records	5 years after funds expended	Paper		
FIN-049	1099 Reports	5 years; provided audited	Paper		
FIN-050	OH Sales Tax Reports	5 years	Paper		
FIN-051	W-9 Forms	Until superseded or 2 yrs after contract expiration	Paper		
FIN-052	Bank Signature Cards	Until superseded	Paper		
FIN-053	Quarterly Bank Collateral Reports	2 years after audit	Paper/ Electronic		

HR

<b>(1) Schedule Number</b>	<b>(2) Record Title and Description</b>	<b>(3) Retention Period</b>	<b>(4) Media Type</b>	<b>(5) For use by Auditor of State or LGRP</b>	<b>(6) RC-3 Required by LGRP</b>
HR-001	Accident/Incident Reports	5 years	Paper/ Electronic		
HR-002	Background Checks (Employees)	5 years after obtaining report	Electronic		
HR-003	Background Checks (Volunteers)	5 years after obtaining report	Electronic		
HR-004	COBRA Insurance Records	6 years from date of record	Paper/ Electronic		
HR-005	Payroll Authorization Files	Until superseded	Paper/ Electronic		
HR-006	Employee personnel Files (non-OPERS/non-Payroll)	2 years after termination	Paper/ Electronic		
HR-007	Health Care Reform Records	5 years	Electronic		
HR-008	Employee Benefit Contracts	2 years after all claims are settled	Paper/ Electronic		
HR-009	Job Applications & Resumes (not hired)	4 years	Paper/ Electronic		
HR-010	Job Descriptions	Until Superseded	Paper/ Electronic		
HR-011	OH Public Employee Risk Reduction Program Records and Reports	5 years	Paper/ Electronic		
HR-012	OH Unemployment Records	Permanent	Paper/ Electronic		
HR-013	Workers' Compensation Claims	7 years after termination	Paper/ Electronic		
HR-014	Employee FMLA Documents	2 years after termination	Paper/ Electronic		
HR-015	Employee Disability Accommodations	2 years after termination	Paper/ Electronic		
HR-016	Employee I-9 Forms	1 year after termination	Paper		
HR-017	ADA Grievance Forms/Communications	3 years	Paper/ Electronic		

**IT**

<b>(1) Schedule Number</b>	<b>(2) Record Title and Description</b>	<b>(3) Retention Period</b>	<b>(4) Media Type</b>	<b>(5) For use by Auditor of State or LGRP</b>	<b>(6) RC-3 Required by LGRP</b>
IT-001	IT Purchase Order Requests	1 year	Paper/ Electronic		
IT-002	Firewall Logs	UNLAV	Paper/ Electronic		
IT-003	Server Logs	UNLAV	Paper/ Electronic		
IT-004	Employee General Work Computer Files (Reports, Data, Etc.)	UNLAV	Electronic		
IT-005	Network Drive Backups	1 Week Cycle	Electronic		
IT-006	Software and Media Licensing Information	Until no longer used	Paper/ Electronic		

**Cataloging**

<b>(1) Schedule Number</b>	<b>(2) Record Title and Description</b>	<b>(3) Retention Period</b>	<b>(4) Media Type</b>	<b>(5) For use by Auditor of State or LGRP</b>	<b>(6) RC-3 Required by LGRP</b>
CAT-001	Cataloging Records and Reports	UNLAV	Paper/ Electronic		