



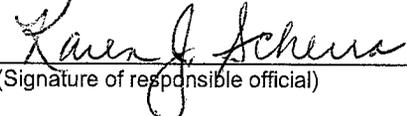
Ohio History Connection
 State Archives of Ohio
 Local Government Records Program
 800 E. 17th Avenue
 Columbus, OH 43211-2474

RECORDS RETENTION SCHEDULE (RC-2) – Part 1

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

Section A: Local Government Unit

Clermont County Mental Health and Recovery Board 5200
 (Local government entity) (Unit)

 Karen Scherra Director 12/7/15
 (Signature of responsible official) (Name) (Title) (Date)

Section B: Records Commission

Clermont County Records Commission (513) 735-8660
 Records Commission (Telephone number)

289 East Main Street Batavia 45103 Clermont
 (Address) (City) (Zip code) (County)

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

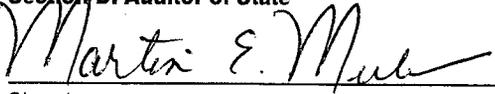
I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, 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.

 12/18/15
 Records Commission Chair Signature Date

Section C: Ohio History Connection - State Archives

 Local Government Records Archivist 1/7/16
 Signature Title Date

Section D: Auditor of State

 1-26-16
 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

2-10-2016

Schedule of Records Retention and Disposition

Section E: Records Retention Schedule
Clermont County
Mental Health and Recovery Board

(Local government entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For Use by Auditor of State or OHS LGRP	(6) RC-3 Required by OHS LGRP
5200-01	Agency Files – Materials relating to agencies providing services under contract with Board, including contracts, agency reports, evaluations, Quality Assurance plans, and related correspondence	Maintain until no longer of administrative, fiscal or legal value in electronic format	Electronic		<input type="checkbox"/>
5200-01A	Agency Files – Materials relating to agencies providing services under contract with Board, including contracts, agency reports, evaluations, Quality Assurance plans, and related correspondence	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
5200-02	Annual Comprehensive Plan – Annual Community Plans, ODMH and ODADAS for all services to be provided; includes plans, budgets, etc.	Maintain until no longer of administrative, fiscal or legal value in electronic format	Electronic		<input type="checkbox"/>
5200-02A	Annual Comprehensive Plan – Annual Community Plans, ODMH and ODADAS for all services to be provided; includes plans, budgets, etc.	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
5200-03	Applications for Employment – Job postings and unsuccessful applications	1 year	Paper/Electronic		<input type="checkbox"/>
5200-04	Audit Reports – Annual agency and State Auditor examinations	Maintain until no longer of administrative, fiscal or legal value in electronic format	Electronic		<input type="checkbox"/>
5200-04A	Audit Reports – Annual agency and State Auditor examinations	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
5200-05	Bids-Successful	8 years after completion	Paper/Electronic		<input type="checkbox"/>
5200-06	Bids-Unsuccessful	2 years after contract award	Paper/Electronic		<input type="checkbox"/>
5200-07	Board Member Information	Permanent	Paper/Electronic		<input type="checkbox"/>
5200-08	Board Policy/Procedure – Includes contract standards, personnel policy/procedure and operations policy/procedure	Once superseded, retain 5 years	Paper/Electronic		<input type="checkbox"/>

Schedule of Records Retention and Disposition

Clermont County

Mental Health and Recovery Board

(Local government entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Required by OHS-LGRP
5200-09	Civil Commitment Papers	6 years	Paper/Electronic		<input type="checkbox"/>
5200-10	Contracts	8 years after completion	Paper/Electronic		<input type="checkbox"/>
5200-11	Financial Records – Accounting records documenting annual budget expenditure and receipts	5 years, provided audited	Paper/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.	<input type="checkbox"/>
5200-12	General Correspondence – Various general subject correspondence in paper or email format	Review and purge annually	Paper/Electronic		<input type="checkbox"/>
5200-13	Grant Records—Successful – Grant Applications and all documentation to support grant funding	Maintain until no longer of administrative, fiscal or legal value in electronic format	Electronic		<input type="checkbox"/>
5200-13A	Grant Records—Successful – Grant Applications and all documentation to support grant funding	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
5200-14	Grant Applications—Unsuccessful – Grant Applications and all documentation to support the denial of the request.	1 year	Paper/Electronic		<input type="checkbox"/>
5200-15	Insurance Policies	Permanent	Paper/Electronic		<input type="checkbox"/>
5200-16	Inventory of Property	2 years	Paper/Electronic		<input type="checkbox"/>
5200-17	Litigation Files —Records pertaining to Board litigation	5 years after all legal action terminated and appeals exhausted	Paper/Electronic		<input type="checkbox"/>
5200-18	Litigation Files-Official Court —Rulings, findings briefs and any other official documentation related to Board litigation	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
5200-19	Client Demographics and Claim Files —Records pertaining to clients; maintained electronically	10 years	Electronic		<input type="checkbox"/>

Schedule of Records Retention and Disposition

Clermont County

Mental Health and Recovery Board

(Local government entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Required by OHS-LGRP
5200-20	Minutes of the Board – Record of meetings, resolutions, contracts, etc., which document policy and decision of the Board	Maintain until no longer of administrative, fiscal or legal value in electronic format	Electronic	<input type="checkbox"/>	<input type="checkbox"/>
5200-20A	Minutes of the Board – Record of meetings, resolutions, contracts, etc., which document policy and decision of the Board	Permanent	Paper/Microfilm	<input type="checkbox"/>	<input checked="" type="checkbox"/>
5200-21	Payroll and Leave Records – Internal copies of timesheets, etc.; original filed with Auditor	3 years, provided audited	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
5200-22	Personnel Files – Including application, evaluations, etc.	60 years after termination	Paper/Microfilm	<input type="checkbox"/>	<input type="checkbox"/>
5200-23	Publications – Departmental newsletters, brochures and manuals	Until superseded, appraise for historical value	Paper/Electronic	<input type="checkbox"/>	<input type="checkbox"/>
5200-24	State Reports – All records pertaining to various reports compiled for State review	Maintain until no longer of administrative, fiscal or legal value in electronic format	Electronic	<input type="checkbox"/>	<input type="checkbox"/>
5200-24A	State Reports – All records pertaining to various reports compiled for State review	Permanent	Paper/Microfilm	<input type="checkbox"/>	<input checked="" 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.