



Beavercreek Township
Records Retention & Disposition Schedule

Approved 9/2010; Rev. 8/2014

**1981 Dayton-Xenia Rd.
Beavercreek, OH 45434
937-429-4472**

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This manual was created to address
the record retention needs of
Beavercreek Township.



Each department/office has its own section.



To preempt duplication,
records common to all
departments/offices
are listed under the
General Administrative section.

**BEAVERCREEK TOWNSHIP
RECORDS MANUAL**

Schedule of Records Retention and Disposition (RC-2)

BOARD OF TRUSTEES

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-BOT-01	FENCE DISPUTE FORMS Also known as line fence dispute forms. Forms filed with Trustees to settle disputes regarding the building of fences. NOTE: Considered mostly an historical document, but could still be required.	Permanent	Public	Paper	Station 61	RC-3 Required
14-BOT-02	PERSONNEL POLICY MANUAL May include job descriptions and requirements, as well as policies concerning leave, appropriate behavior, evaluation, discipline and benefits. This series does not include policies that are not reviewed by the Board. NOTE: Generally a copy of policy changes are kept permanently in the Board of Trustees meeting materials. See Board of Trustees' Minutes & Meeting Materials (Trustee Mtgs.)	Until Superseded	Public	Paper; Electronic	Fiscal Office	

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CEMETERY

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-CEM-01	BURIAL PERMITS (BURIAL TRANSIT PERMITS) These records include personal data, manner and place of disposal and authorization to dispose of the body.	3 fiscal years	Public	Paper	Fiscal Office	
14-CEM-02	BURIAL RECORDS (INTERMENT RECORDS) These records document the burials in the Township cemetery and may show the name of the decedent, place of birth, last residence, age at death, sex, cause of death, date of interment, lot number, location, box or vault, cost of digging, name of funeral director, address and remarks.	Permanent	Public	Paper; Electronic	Fiscal Office	RC-3 Required
14-CEM-03	CEMETERY ACCOUNT RECORDS May include information about funds for the care of the cemetery from investments or donations. Also may include receipts and record of disbursements.	Permanent	Public	Paper	Fiscal Office	
14-CEM-04	CEMETERY DEED RECORDS/CEMETERY LOT SALES These records may include the lot number, section, parties, amount, lot description, witnesses, dates, cemetery blueprints, and deeds to Township property.	Permanent	Public	Paper	Fiscal Office	RC-3 Required
14-CEM-05	CEMETERY PLATS These records contain plat information for the Township cemetery showing roads and pathways, with lots separately defined and numbered consecutively.	Permanent	Public	Paper; Electronic	Fiscal Office	RC-3 Required

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FIRE DEPARTMENT

Record Series #	Record Series Title	Retention Period	Confidentiality	Medium	Location	RC-3 Required?
14-FD-01	ACCIDENT FILES These records are maintained in a working database.	Permanent	Public	Paper; Electronic	Fire Admin	
14-FD-02	APPARATUS INVENTORY REPORT (INVTRY02)	Life of the Equipment	Public	Paper; Electronic	Fire Admin	
14-FD-03	ARCHIVE FORM (ADMIN009)	Until No Longer Needed	Public	Paper	Fire Admin; Sta. 61	
14-FD-04	ARSON FILES These records may contain the date of fire, address, details of the investigation, personnel involved, and other pertinent information.	Permanent	Public	Paper; Electronic	Fire Prevention	RC-3 Required
14-FD-05	BFD MEMO (ADMIN002)	Until No Longer Needed	Public	Paper	Fire Admin	
14-FD-06	BIDS FOR FIRE EQUIPMENT These records are formal bid packets submitted in response to a request by the Fire Department. When the Fire Department selects a provider, unsuccessful bid submittals will be retained as evidence supporting the final choice, and as reference, for 3 years. Successful bid submittals are retained for the life of the equipment.	3 Years; Life of the equipment	Public	Paper	Fiscal Office	
14-FD-07	BUDGET INPUT SHEETS (ADMIN010)	Until No Longer Needed	Public	Paper	Fire Admin	
14-FD-08	BUILDING SURVEYS/PRE-ACTION FIRE PLAN	Until No Longer Needed	Public	Paper; Electronic	Fire Admin	
14-FD-09	CARBON MONOXIDE RESPONSE REPORT (EQUIP004)	7 Years	Public	Paper	Fire Admin	
14-FD-10	CERTIFICATE OF COMPLETION (TRAIN017)	Until no longer needed	Public	Electronic	Fire Admin	

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FIRE DEPARTMENT

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14-FD-11	COMMUNICATIONS PROJECT ACTIVITY FORM (ADMIN030)	1 Year	Public	Paper; Electronic	Fire Admin	
14-FD-12	COMPLAINT FORM (ADMIN004)	1 Year	Public	Paper	Fire Admin	
14-FD-13	CONSENT TO SEARCH FORM (PREV0002)	Permanent	Public	Paper	Fire Prevention	
14-FD-14	COURSE EVALUATION SUMMARY FORM	Until no longer needed	Public	Electronic	Fire Admin	
14-FD-15	DAILY ACTIVITY LOG (ADMIN006)	1 Year	Public	Paper; Electronic	Fire Admin	
14-FD-16	DAMAGED EQUIPMENT REPORT (EQUIP001)	Life of the Equipment	Public	Paper; Electronic	Fire Admin	
14-FD-17	DAYCARE INSPECTION FORM (INSP0004)	Life of Structure; Permanent	Public	Paper	Fire Admin	
14-FD-18	DRUG BAG SEALS TRACKING FORM	1 Year	Public	Paper	Fire Admin	
14-FD-19	DWELLING INSPECTION FORM (INSP0005)	Life of Structure; Permanent	Public	Paper	Fire Admin	
14-FD-20	EMS CABINET SUPPLY REQUISITION (EQUIP005)	Until No Longer Needed	Public	Paper; Electronic	Fire Admin	

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14-FD-21	EMS RUN REPORT (APPAR006)	See note	Public*	Paper; Electronic	Fire Admin	
<p>These records pertain to emergency medical incidents and may include location, date, time, patient information, type of injury, what equipment was dispatched, disposition of the incident, billing files, and other pertinent information. They also may include a refusal form if treatment or transportation is refused by the patient.</p> <p>NOTE: Hard copies that have been entered into the database shall be retained for 7 years, provided no action is pending, and provided the patient is not a minor. If the patient is a minor, the records must be retained until the minor reaches the age of 18.</p> <p>*Certain information which may not be public record will be redacted prior to any material being disclosed.</p>						
14-FD-22	EQUIPMENT MAINTENANCE RECORDS	Life of the equipment	Public	Paper; Electronic	Fire Admin; Maintenance	
<p>These records contain information with regard to the maintenance and repair of equipment including pumps, hoses, vehicles and other apparatus and equipment.</p> <p>NOTE: Does not include hydrants.</p>						
14-FD-23	EQUIPMENT TRANSFER SHEET (APPAR008)	Until No Longer Needed	Public	Paper	Fire Admin	
14-FD-24	EXPOSURE INVESTIGATING FORM (ADMIN024)	Term of Employment	Public*	Paper	Fire Admin	
<p>Maintained in employee's medical file.</p> <p>*Certain information which may not be public record will be redacted prior to any material being disclosed.</p>						
14-FD-25	FIRE APPARATUS CHECK SHEET (MAINT002)	Life of the Equipment	Public	Paper; Electronic	Fire Admin; Maintenance	
14-FD-26	FIRE & EMS INCIDENT EXPOSURE REPORT	Term of Employment	Public*	Paper; Electronic	Fire Admin	
<p>Maintained in employee's medical file.</p> <p>*Certain information which may not be public record will be redacted prior to any material being disclosed.</p>						

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		Until Superseded;				
14-FD-27	FIRE CODE	Permanent	Public	Paper	Fire Admin	
14-FD-28	FIRE HOSE RECORD FORM (CARE000)	Life of the Equipment	Public	Paper; Electronic	Fire Admin	
14-FD-29	FIRE INSPECTION REPORTS These records are retained in hard copy form.	Life of the structure	Public	Paper; Electronic	Fire Prevention	
14-FD-30	FIRE PREVENTION APPLICATION PERMITS These records may list the applicant, date of application, date issued, type of business, and type of storage used.	Life of Structure	Public	Paper	Fire Prevention	
14-FD-31	FIRE SAFETY INSPECTION FORM (INSP0003)	Life of Structure; Permanent	Public	Paper; Electronic	Fire Prevention	
14-FD-32	FIRE TRAINING REPORT (TRAIN001)	Permanent	Public	Paper; Electronic	Fire Admin	
14-FD-33	FIREPLACE INSPECTION FORM (INSP0006)	Life of Structure; Permanent	Public	Paper	Fire Prevention	
14-FD-34	FIREWORKS PERMITS	1 year	Public	Paper	Fire Prevention	
14-FD-35	GLUCOMETER CONTROL TEST LOG (EQUIP006)	Life of the Equipment	Public	Paper	Fire Prevention	
14-FD-36	HOSE LOAD CARDS	Until superseded	Public	Paper	Fire Prevention	
14-FD-37	HOSE TEST RECORD (CARE002)	Life of the Equipment	Public	Paper; Electronic	Fire Prevention	

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14-FD-38	HYDRANT INSPECTION AND FLOW TEST RECORD (CARE002)	Permanent	Public	Paper; Electronic	Fire Prevention	
14-FD-39	HYDRANT LOCATION RECORDS	Permanent	Public	Paper; Electronic	Fire Prevention	
14-FD-40	INCIDENT REPORTS	See note	Public	Paper; Electronic	Fire Admin	
<p>These records document any action taken by the fire department and may include EMS runs, fire runs, citizen-initiated non-emergency calls, fallen trees, downed power lines, reports of smoke, suspicious smells, vehicle or structure fires, hazardous spills, etc. NOTE: These records are maintained in the permanent database; however, reports prior to 2001 are in hard copy form only.</p>						
14-FD-41	INFECTIOUS CONTROL FORM (ADMIN025) Maintained in employee's medical file.	Term of Employment	Public*	Paper; Electronic	Fire Admin	
<p>*Certain information which may not be public record will be redacted prior to any material being disclosed.</p>						
14-FD-42	LOST OR MISSING EQUIPMENT REPORT (EQUIP000)	Life of the Equipment	Public	Paper	Fire Admin	
14-FD-43	MEDIC DAILY POST-RUN CHECK SHEET (MAINT008)	Life of the Equipment	Public	Paper; Electronic	Fire Admin; Maintenance	
14-FD-44	MEDIC WEEKLY CHECK SHEET (MAINT009)	Life of the Equipment	Public	Paper; Electronic	Fire Admin; Maintenance	

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<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>Disposal Form</u>
14-FD-45	MEDICAL DIRECTOR APPROVAL FORM	Until Superseded	Public	Paper	Fire Admin	RC-3 Required?
14-FD-46	NIGHTHAWK DETECTOR TRACKING LOG (EQUIP007)	Until No Longer Needed	Public	Paper	Fire Admin	
14-FD-47	OHIO FIRE INCIDENT REPORTING SYSTEM	7 Years	Public	Paper; Electronic	Fire Admin	
14-FD-48	OUT OF SERVICE TAG (MAINT006)	Until No Longer Needed	Public	Paper	Fire Admin	
14-FD-49	OUTSIDE TRAINING REQUEST FORM	1 Year	Public	Paper	Fire Admin	
14-FD-50	OVERTIME LOG	1 Year	Public	Paper; Electronic	Fire Admin	
14-FD-51	PHARMACY LICENSE	Until Superseded	Public	Paper	Fire Admin; Fire Stations	
14-FD-52	POST EXPOSURE FOLLOW-UP FORM (ADMIN026) Maintained in employee's medical file.	Term of Employment	Public*	Paper	Fire Admin	
*Certain information which may not be public record will be redacted prior to any material being disclosed.						
14-FD-53	PROTECTIVE CLOTHING INSPECTION REPORT (ADMIN012)	Life of the Equipment	Public	Paper; Electronic	Fire Admin	
14-FD-54	PROTECTIVE CLOTHING WASH RECORD (ADMIN013)	Life of the Equipment	Public	Paper; Electronic	Fire Admin; Fire Stations	
14-FD-55	PUMP OPERATORS WORKSHEET (EQUIP003)	Until No Longer Needed	Public	Paper	Fire Admin; Fire Stations	

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14-FD-56	PURCHASE REQUESTS	Until No Longer Needed	Public	Paper	Fire Admin; Fiscal Office	
14-FD-57	REHAB TRACKING FORM (ADMIN029)	1 Year	Public	Paper	Fire Admin	
14-FD-58	RESCUE EQUIPMENT USE FORM (CARE003)	Life of the Equipment	Public	Paper; Electronic	Fire Admin	
14-FD-59	RUN TIME LOG (ADMIN008)	Until No Longer Needed	Public	Paper	Fire Admin; Fire Stations	
14-FD-60	ROPE USE FORM (CARE004)	Life of the Equipment	Public	Paper; Electronic	Fire Admin	
14-FD-61	STANDARD OPERATING GUIDELINES (GO'S, SOP'S, RECORDS AND REPORTS)	Permanent	Public	Paper; Electronic	Fire Admin	
14-FD-62	STANDING ORDERS	Until No Longer Needed	Public	Paper; Electronic	Fire Admin	
14-FD-63	STUDENT SIGN-IN (TRAIN016)	Until No Longer Needed	Public	Electronic	Fire Admin	
14-FD-64	TACTIC WORKSHEET FORM ONLY	Until No Longer Needed	Public	Paper	Fire Admin	

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14-FD-65	TIME AND TRADE FORMS A multi-part form. These records document requests for time trades with other employees, various types of leave, earning and using comp time. Includes the dates of trade/leave/ comp time, date of request, signature of the employee(s) and the supervisor's signature. Time & Trade forms are attached to employee's time sheet. NOTE: Copies are kept at Fire Admin.	2 Years	Public	Paper	Fiscal Office	
14-FD-66	TRAINING MATERIALS FILES	Until Superseded	Public	Paper; Electronic	Fire Admin	
14-FD-67	TRAINING RECORDS These records contain information documenting an employee's training certifications. NOTE: These records are retained separately from the personnel file during the employee's term of employment. Once the employee has separated from the Township, personnel and training files are merged and archived.	Permanent	Public	Paper; Electronic	Fire Admin	
14-FD-68	UNIFORM VOUCHER (ADMIN001)	Until No Longer Needed	Public	Paper	Fire Admin; Fiscal Office	
14-FD-69	VEHICLE ACCIDENT REPORT (SAFE003)	Permanent	Public	Paper; Electronic	Fire Admin	
14-FD-70	WAIVER FOR RIDE-ALONGS (ADMIN027)	1 Year	Public	Paper	Fire Admin	
14-FD-71	WORK SCHEDULES	1 Year	Public	Paper; Electronic	Fire Admin	

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Schedule of Records Retention and Disposition (RC-2)

FISCAL OFFICER

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-FO-01	<p>AMENDED OFFICIAL CERTIFICATES OF ESTIMATED RESOURCES</p> <p>From County Auditor of Township for the yearly budget.</p> <p><i>NOTE - 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.</i></p>	3 Years and audited	Public	Paper	Fiscal Office	
14-FO-02	<p>ANNUAL BUDGET RESOLUTIONS</p> <p>July document and December amendments.</p>	Incorporate into minutes; retain copies	Public	Paper	Fiscal Office	
14-FO-03	<p>ANNUAL FINANCIAL REPORTS</p> <p>These records document the Township's financial condition and evaluate the accounting practices of the previous year. The annual financial report may include a balance sheet of assets and liabilities, an income and expense statement, and notes explaining any discrepancies.</p> <p><i>NOTE - 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.</i></p>	3 fiscal years; provided audited	Public	Paper	Fiscal Office	
14-FO-04	ANNUAL FINANCIAL REPORTS TO AUDITOR	Permanent	Public	Paper	Fiscal Office	
14-FO-05	<p>APPROPRIATIONS LEDGERS</p> <p>These are receipts and expenditures records. They may include who the funds are for, for what purpose, when available, year available, amount, and where funds came from.</p> <p><i>NOTE - 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.</i></p>	3 fiscal years, provided audited	Public	Paper; Electronic	Fiscal Office	

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FISCAL OFFICER

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-FO-06	AUDIT REPORTS An audit is conducted by the Ohio Auditor of State and includes comments on the Township's accounting practices. <i>NOTE - 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.</i>	3 fiscal years and audited	Public	Paper	Fiscal Office	
14-FO-07	BONDS (FOR OFFICIALS) These records are arranged by the official's title and therein chronologically. Contains a record of surety bonds filed by township officials showing office holder, office, sureties, amounts and conditions of bond, date approved, date filed and oath.	Permanent	Public	Paper	Fiscal Office	RC-3 Required
14-FO-08	BOND REGISTERS (REVENUE BONDS)	Permanent	Public	Paper	Fiscal Office	
14-FO-09	BOARD OF TRUSTEES MINUTES These records are meeting minutes and attachments that document all matters brought before the Board of Trustees at meetings. These records document all changes to policies, resolutions and correspondence. This series does not include meeting notices, bulletins or documentation of meeting related expenses. <i>NOTE: If audio and/or video recordings of a meeting are transcribed, the recordings can be destroyed one (1) year after the minutes have been approved and published.</i>	Permanent	Public	Paper; Electronic	Fiscal Office	RC-3 Required
14-FO-10	BUDGET DOCUMENTATION These records are used to prepare the Township's budget. The files may include planning materials, such as current budget and financial reports, worksheets, projections of revenue, expenses, fixed costs, and requests made by each department for funding. <i>NOTE - 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.</i>	3 fiscal years, provided audited	Public	Paper	Fiscal Office	

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14-FO-11	<p>CERTIFICATES OF TOTAL AMOUNT FROM SOURCES AVAILABLE FOR EXPENDITURES</p> <p>These records show the beginning balance and monies expected for the year. <i>NOTE - 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.</i></p>	3 years, provided audited	Public	Paper	Fiscal Office	
14-FO-12	<p>EMERGENCY FUND MINUTES</p> <p>These records are arranged chronologically by date of proceeding.</p>	Permanent	Public	Paper	Fiscal Office	RC-3 Required
14-FO-13	<p>JOURNAL ENTRIES/GENERAL LEDGER (UAN)</p> <p>These are records of revenue and expenditures that are entered into the journal from source documents such as cash receipts, invoices, deposit slips and checks. They are then arranged by account numbers in the general ledger. Electronic accounting systems automatically post entries into accounts. Separate journals and ledgers are part of an electronic accounting system.</p>	5 Years	Public	Paper; Electronic	Fiscal Office	
14-FO-14	<p>MATERIALS USED TO PREPARE TRUSTEE MINUTES</p> <p>This material is not a record. It is information provided by department heads and others to aid the Fiscal Officer in the official transcription of the minutes of the Trustee meetings.</p>	Until No Longer Useful	Public	Paper; Electronic	Fiscal Office	
14-FO-15	<p>MEETING MATERIALS (TRUSTEE MTGS.)</p> <p>These include agendas and supporting documentation. Supporting documents may include department reports, budgets, financial audits, or committee reports and minutes.</p>	1 Year	Public	Paper; Electronic	Fiscal Office	

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FISCAL OFFICER

Record Series #	Record Series Title	Retention Period	Confidentiality	Medium	Location	RC-3 Required?
14-FO-16	PERSONNEL FILES These records are maintained for each employee and document all actions that occurred during the employee's active employment. They are used to record employee performance and remuneration, maintain current contact information, and keep track of employee benefits (including retirement). These records document the qualifications possessed by the employee to carry out his/her duties. They include résumés, letters of reference and/or signed release for reference, transcripts, acknowledgement forms, required licenses, notes and ratings from the job interview, the official letter of hire stating position and salary, performance evaluations, any changes to the position and rate of pay for the employee, and requests for change in position. Retirement records document the eligibility for and determination of retirement benefits. These files include membership applications, notice by the employee of the qualifying event, application to receive retirement benefits, any change of name or address forms, and changes in designated beneficiaries forms. Leave records document any intervals in which the employee was not accruing time and retirement benefits. They may include the employee's request for leave, any supporting documents, and managerial decisions. Life insurance records include enrollment and beneficiary forms for life and accidental death insurance plans. NOTE: Specific information pertaining to firefighters and EMTs which may be deemed residential and familial information is not subject to disclosure. See R.C.§149.43(A)(1)(p) and R.C.§149.43(7)(a-g).	Permanent	Public (See note)	Paper	Fiscal Office	
14-FO-17	RESOLUTIONS These records are the original documents signed by the Trustees and contain the resolution number, the reason for the resolution, the date passed, a description of the action, the person introducing the resolution, a reference to the date proposed, and action taken by the board.	Permanent	Public	Paper	Fiscal Office	RC-3 Required
14-FO-18	SEMI-ANNUAL APPORTIONMENTS OF TAXES	3 fiscal years	Public	Paper	Fiscal Office	
14-FO-19	TAX SETTLEMENTS These records are the semi-annual apportionment of taxes from the County Auditor. NOTE - 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.	3 years and audited	Public	Paper	Fiscal Office	

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GENERAL ADMINISTRATIVE

<u>Administrative</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-GA-01	ACCOUNTS PAYABLE Accounts payable lists money owed by the Township from the time of inception to resolution. May include purchase of equipment, supplies, insurance, contract services, performances, reimbursement warrants for employees and elected officials for travel, and obligations from standing orders that have not yet been paid. NOTE: These records are generated manually and maintained using electronic software.	5 Years	Public	Paper	Fiscal Office	
14-GA-02	ACCOUNT RECORDS Arranged chronologically by date of entry. May include payment register by vendor or bill cycle, year to date payments (by vendor), receipt records (standard, interest, memo), charge records (i.e., payroll processor, health insurance, flexible spending plan), warrants.	Permanent	Public	Paper	Fiscal Office	
14-GA-03	AGENDAS Specifically, agendas for meetings of the Beaver Creek Township Board of Trustees.	3 Years	Public	Paper; Electronic	Fiscal Office	
14-GA-04	ANNUAL BUDGET - FINAL This record forecasts income and allocates expenditures for the next fiscal year. NOTE: These records are the version approved by the Beaver Creek Township Board of Trustees and official copies are generally kept with the official meeting minutes.	Permanent	Public	Paper	Fiscal Office	
14-GA-05	ANNUAL INVENTORY This record is a list of all Township property broken out by department. Includes vehicles, computers, office furniture, office equipment, supplies.	Permanent	Public	Paper	Fiscal Office	
14-GA-06	ANNUAL REPORTS Includes reports from any departments within the Township. May include statistics and budget projections. NOTE: Annual reports are presented at Board of Trustees meetings and incorporated as part of the official meeting minutes.	Permanent	Public	Paper	Fiscal Office	RC-3 Required
14-GA-07	APPLICATIONS FOR EMPLOYMENT These records are applications for positions in the Township; some applications may not be solicited. NOTE: If the individual is hired, the application becomes part of the personnel file, and at that time becomes public record.	3 Years	Public	Paper	Fiscal Office	

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GENERAL ADMINISTRATIVE

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-GA-08	BANK STATEMENTS The records list all transfers of money through a given bank account. For each bank account held by the Township, the bank provides a statement listing all deposits and withdrawals made during the previous calendar month. <i>NOTE - 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.</i>	3 fiscal years, provided audited	Public	Paper	Fiscal Office	
14-GA-09	BIDS/PROPOSALS (REQUEST FOR) These records are formal bid packets submitted in response to a request by the Township. When the Township selects a provider for goods or services, other formal bids are retained as evidence supporting the final choice, and as reference. All bids/proposals are retained until the close of the contract period + 3 Years, provided audited. <i>NOTE: See Fire Department and Maintenance sections for bids for equipment.</i> <i>NOTE - 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.</i>	3 fiscal years, provided audited/ Permanent	Public	Paper	Fiscal Office	
14-GA-10	BLANK FORMS Used to gather and record information either in paper or electronic format.	Until No Longer Useful	Public	Paper; Electronic	All Departments	
14-GA-11	CALENDARS/PLANNERS These may be electronic or manual planners and calendars that are used to track park reservations, meeting room reservations, or individual Township employees' meetings and appointments. <i>NOTE: A calendar or planner can become a record if it is specifically incorporated into other work-related documents. At this point, that particular calendar or planner becomes an official record and must be retained in accordance with the retention schedule for that record.</i>	Until No Longer Useful	Public	Paper	All Departments	

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14-GA-12	CASH BOOKS This record series includes cash receipts and/or expenditures books. <i>NOTE - 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.</i>	3 fiscal years, provided audited	Public	Paper; Electronic	Fiscal Office; Fire Prevention; Zoning	
14-GA-13	CERTIFICATION OF PUBLISHING FOR LEGAL NOTICES This series includes publication date, where it was published, for what reason, length of run, and charge. <i>NOTE - 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.</i>	3 fiscal years, provided audited	Public	Paper	Fiscal Office	
14-GA-14	CHECK REGISTERS Includes check stubs and duplicate copies of checks. <i>NOTE - 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.</i>	3 fiscal years, provided audited	Public	Paper; Electronic	Fiscal Office	
14-GA-15	CONSTRUCTION FILES Records relating to building or road constructions, improvements, bids, specifications, inventories, and contracts.	Permanent	Public	Paper	Fiscal Office	
14-GA-16	CONTRACTS	Permanent	Public	Paper	Fiscal Office	

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14-GA-17	CONTINUING EDUCATION & TRAINING These records document on-going training of employees and may include certification material. NOTE: The Fire Department will maintain all fire related training certifications in a specific training file for each employee. At termination of employment, these records will be incorporated into the employee's personnel file and archived. For non-fire department employees, education and training certificates will be kept in the employee's personnel file.	Permanent	Public	Paper	Fire Admin	
14-GA-18	DEPOSIT SLIPS AND CANCELED CHECKS NOTE - 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.	3 fiscal years, provided audited	Public	Paper	Fiscal Office	
14-GA-19	DEPARTMENT BUDGETS These records are used to prepare the department budget. They may include planning materials, current budget, quotes, research material, requests from staff for requested items.	2 Years	Public	Paper	Fiscal Office	
14-GA-20	DEPARTMENT REPORTS The reports are both narrative and statistical in nature and may include information from staff, supervisors, department heads, and elected officials.	2 Years	Public	Paper	Fiscal Office	
14-GA-21	DIRECTORIES/CONTACT LISTS These are directories or contact lists created by the Township to facilitate communication with other staff or specific individuals, companies, or other organizations that have a commonality that necessitates being grouped together, such as staff directories, community agencies, schools, media contacts, and professional contacts. This record may include name, address, telephone number, email address, and fax numbers. This information may be kept on a printed sheet, rolodex, email address book, and databases.	Until No Longer Useful	Public	Paper	All Departments	

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14-GA-22	DISCIPLINARY RECORDS	See Note	Public	Paper	Fiscal Office	
<p>NOTE: Disciplinary records shall be maintained in the employee's personnel file in accordance with procedures as established in the Beaver Creek Township Personnel Policy and labor/management agreements. At the end of the designated retention period, the disciplinary record shall be removed from the employee's personnel file and disposed of appropriately.</p>						
14-GA-23	DRAFTS	Until No Longer Useful	Public	Paper	All Departments	
<p>These are drafts of documents, publications, meeting minutes, or any other work-related record that can be discarded once the final draft is completed and approved.</p>						
14-GA-24	DUPLICATES	Until No Longer Useful	Public	Paper	All Departments	
<p>These are copies of originals that exist elsewhere, either in hard copy or in electronic format.</p>						
14-GA-25	ELECTRONIC FILES	See Note	Public	Electronic	All Departments	
<p>These are records generated electronically that serve as the original copy. They may include correspondence, publications, presentations, or other forms of text-based documents.</p> <p>NOTE: Must be retained in accordance with the retention schedule for the content of that record.</p>						
14-GA-26	EMAIL	See Note	Public	Paper; Electronic	All Depts.; IT	
<p>This record includes all "sent" and "received" email, excluding SPAM, delivered to or created from Beaver Creek Township's email system.</p> <p>NOTE: Must be retained in accordance with the retention schedule for the content of that record. The actual email will not be kept in the system for longer than 3 years. This includes email with content that is not determinable.</p>						

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14-GA-27	EMPLOYEE TIME RECORDS	3 fiscal years, provided audited	Public	Paper	Fiscal Office	
<p>This records include time sheets signed by employees and may have leave slips attached. <i>NOTE - 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.</i></p>						
14-GA-28	EMPLOYER CONTRIBUTIONS TO RETIREMENT ACCOUNTS	Permanent	Public	Paper	Fiscal Office	
<p>These records are used to calculate and document Township payments to employee retirement accounts. Files may contain forms that are used to report gross wages and hours for each employee, the invoice for the employer contribution, and documentation of the transfer of funds.</p>						
14-GA-29	GENERAL CORRESPONDENCE	3 Years	Public	Paper; Electronic	All Departments	
<p>These records do not pertain to a specific project or part of another record series, and they are often organized chronologically or by correspondent's name. General correspondence may exist in a variety of formats, including memos, letters, notes, and electronic mail messages. NOTE: Correspondence pertaining to a specific project or another record series should be filed with that project or record series.</p>						
14-GA-30	GRANTS	Permanent	Public	Paper; Electronic	Fiscal Office; Various Depts.	
<p>Contains purpose of grant, what funds are being applied for, name of applicant, dates, information to support grant request, and projects to be done with grant funds.</p>						
14-GA-31	INCOME TAX RETURNS	Permanent	Public	Paper	Fiscal Office	
<p>Includes quarterly and yearly returns for local, state and federal taxes.</p>						

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14-GA-32	INSTRUCTION MANUALS These include any documentation that instructs how to assemble, use, operate, order parts for and repair a piece of equipment, furniture or other items. This may include AV equipment, office equipment, digital camera, etc. Retain until the Township no longer owns the item. NOTE: Maintain warranty information in the department that bought the item and forward a copy to the Fiscal Officer.	Until No Longer Useful	Public	Paper	All Departments	
14-GA-33	INSURANCE POLICIES These records are files that contain any insurance policies that the Township has purchased or records of any claims against those policies. Policies may cover buildings and contents, vehicles, general liability, data processing equipment, miscellaneous property, and parks and park property.	Permanent	Public	Paper	Fiscal Office	
14-GA-34	INVOICES, PURCHASE REQUESTS & VOUCHERS These records accompany the exchange of goods and services between the Township and its vendors. They are source documents for journal entries/general ledgers and accounts payable. May include receipts, shipping and handling information, packing slips, credit memos, or other supporting documentation. NOTE - 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.	3 fiscal years, provided audited	Public	Paper	Fiscal Office	
14-GA-35	KEY LOGS These records manage the inventory and distribution of Township keys, such as keys for building doors, equipment, and vehicles. This may include inventory sheet, key box identification sheet, staff sign-out & sign-in form, lost key documentation and other related documents.	Until Superseded or No Longer Useful	Public	Paper; Electronic	Fiscal Office; Various Depts.	

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14-GA-36	LABELS Used when mailing Township correspondence, as identification on binders, file cabinets, office equipment and documents.	Until No Longer Useful	Public	Paper	All Departments	
14-GA-37	LEASES These are records of any leases the Township has entered into for vehicles or equipment. Also includes leases with organizations using Township property (i.e., Beaver creek Historical Society, Beaver creek Wetlands Association.)	Permanent	Public	Paper	Fiscal Office	
14-GA-38	LEAVE RECORDS These records may include type of leave, time allowed, dates used and time available. <i>NOTE: Leave balances are calculated bi-weekly and are available for review on the Township website. NOTE - 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.</i>	3 fiscal years, provided audited	Public	Paper; Electronic	Fiscal Office	
14-GA-39	LEGAL OPINIONS These records consist of correspondence with the attorney who provided legal counsel for the Township. In the case of zoning, the opinion will be kept in the appropriate file or case file.	Permanent	Confidential	Paper	Various Depts.	RC-3 Required
14-GA-40	LEVY FILES These records include the forms filed to put a levy on the ballot and may include supporting documentation.	Permanent	Public	Paper	Fiscal Office	RC-3 Required

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14-GA-41	LITIGATION FILES These records document any litigation to which the Township is a party. May include depositions, transcripts, decisions, Sheriff's or Police reports, correspondence, data, exhibits, research materials, reports, press releases, media clippings, and other related records. In the case of Zoning, copies of the aforementioned are kept in the appropriate case file. NOTE: This record is public with the exception of correspondence protected by the attorney/client privilege and excepted from disclosure under the Ohio Public Records Act.	Permanent (See note)	Public	Paper	Fiscal Office; Zoning	RC-3 Required
14-GA-42	MEETING RECORDS - INTERNAL These are records of meetings entirely or primarily consisting of Township staff. They may be regularly scheduled meetings, such as	2 Years			Various Depts.	
14-GA-43	MEMBERSHIPS - PROFESSIONAL /CIVIC ORGANIZATIONS Staff/elected official participation in a professional or civic organization that directly relates to their job/elected position and is endorsed by the Township. May include meeting minutes, directories, newsletters, projects, and other related documents. Retain for duration of membership.	Until No Longer Useful	Public	Paper; Electronic	All Departments	
14-GA-44	NEWSPAPER CLIPPINGS/PERIODICAL ARTICLES These records include clippings or articles from local, regional, or other publications that document newsworthy information or events in Beaver Creek Township. NOTE: Transfer those clippings/articles deemed to be of historical value to the storage room in the basement of Station #61 for permanent retention.	Until No Longer Useful	Public	Paper	All Departments	

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14-GA-45	O.P.E.R.S. MONTHLY REPORTS Ohio Public Employees' Retirement System - These records include the employee's name, SSN, report period, total earnings and contributions.	Permanent	Public	Paper	Fiscal Office	
14-GA-46	PAYROLL DEDUCTION/LIABILITY RECORDS These records document payment of financial liabilities for monies withheld from employee wages. The records may include the quarterly form 941 to pay the Internal Revenue Service for taxes withheld, coupons accompanying the quarterly transfer of state withholding taxes, or unemployment wage detail reports and the quarterly report. They may also include documentation of employee contributions to insurance. NOTE: Charitable or employee benefit deductions of firefighters and EMTs which are not required by state law are not subject to disclosure.	5 Years	Public (See note)	Paper	Fiscal Office	
14-GA-47	PAYROLL RECORDS These records document the gross pay for each employee for every pay period. These records may list the hours worked, deductions (withholding taxes, FICA, pension account, insurance premiums, flexible spending plan), and any miscellaneous adjustments. A copy of these records is usually included on the payroll check stub. These records may be created manually, in an electronic payroll system, or by a payroll service.	Permanent	Public	Paper	Fiscal Office	
14-GA-48	PAYROLL REPORTS These records may include information about an employee's pay rate, leave used, leave balances, comp time, injury leave. May be done bi-weekly, monthly, quarterly, semi-annually or annually.	Permanent	Public	Paper	Fiscal Office	

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14-GA-49	POSTAL MAIL - NON-RECORD	Until No Longer Useful	Public	Paper	All Departments	
<p>Postal mail , letters, flyers, postcards, catalogs or other products sent or received through the postal service that does not meet the criteria of the Ohio Revised Code for a record may be discarded immediately or when no longer useful. This may include any mail created or received that is not work-related (personal) or unsolicited mail (junk mail, catalogs, promotional material).</p> <p>NOTE: This type of mail can become a record if it is specifically incorporated into other work-related documents. At that point, this particular mail becomes an official record and must be retained in accordance with the retention schedule for that record.</p>						
14-GA-50	POST-ITS & NOTES	Until No Longer Useful	Public	Paper	All Departments	
<p>These are post-its and notes that serve to record information of temporary importance, correspond transient or non-substantive messages or in lieu of brief oral communication. This may include notes taken during a meeting that are for a person's reference, a note to remember something ("Call Jane at 2PM"), or a post-it on a document or binder ("This is your copy.")</p> <p>NOTE: Post-its or notes can become records if they are specifically incorporated into other work-related documents. At that point, the particular post-it or note becomes an official record and must be retained in accordance with the retention schedule for that record.</p>						
14-GA-51	PRESS RELEASES	2 Years and audited	Public	Paper; Electronic	Fiscal Office	
<p>These records document announcements made by the Township to the public. Press releases pertinent to Board of Trustees meetings may be requested by the auditors.</p> <p>NOTE: After the retention period has been met, the documents may be archived and kept for permanent retention if they are felt to be of historical value.</p> <p>NOTE - 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.</p>						

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14-GA-52	PROCEDURES Generally a process or series of steps, especially of a practical or mechanical nature, involved in a particular form of work. They may include the procedures for answering the telephone, calling off work, making a park reservation.	Until No Longer Useful	Public	Paper; Electronic	All Departments	
14-GA-53	PUBLIC RECORDS REQUESTS These records document any requests for information or public records maintained by the Township. They may include requests for information, correspondence, a copy of the information released, or other related documents.	2 Years	Public	Paper	Fiscal Office	
14-GA-54	RECORDINGS/CDs/TAPE CASSETTES/VIDEOS These are audio records of meetings which may be used in the creation of meeting minutes.	1 Year and approved	Public	Audio Recordings	Township Server	
14-GA-55	RECORDS OF COMMITTEES SERVED ON These records include any committees served on by either elected officials or employees of the Township.	Permanent	Public	Paper	Various Depts.	
14-GA-56	SIGNS - INFORMAL Informal and temporary in nature; used to convey information, instructions, announcements, or rules.	Until No Longer Useful	Public	Paper	Various Depts.	
14-GA-57	SUBJECT FILES These records are used to support administrative functions, program and project planning, procedure development. Subject files are generally organized alphabetically by topic. For topics of continuing interest, files may be segmented into annual files.	Until No Longer Useful	Public	Paper	Various Depts.	

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14-GA-58	TELEPHONE MESSAGES These are manually written telephone messages.	Until No Longer Useful	Public	Paper	All Departments	
14-GA-59	TIME RECORDS These records are used to document an employee's attendance and hours worked, by date and time. They may include time cards, timesheets, etc. Timesheets are usually signed by the employee. NOTE: Township staff, Zoning and Road Department employees attach approved leave requests to the appropriate timesheets prior to turning them in. NOTE - 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.	3 Years, provided audited	Public	Paper	Fiscal Office	
14-GA-60	TOTAL WAGE AND SALARIES REPORTS These records refer to the office copy of the reports. The official reports are sent to the County Auditor. NOTE - 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.	3 Years, provided audited	Public	Paper	Fiscal Office	
14-GA-61	UNION DUES NOTIFICATION These records are generated by the firefighters' union and are put on union letterhead. They consist of a short statement authorizing union dues to be taken out of the employee's paycheck, as well as signature blocks for the employee and the union president. They are retained in the personnel files.	Permanent	Public	Paper	Fiscal Office	

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14-GA-62	VOICE MAIL MESSAGES Incoming telephone calls recorded on voice mail systems or answering machines.	Until No Longer Useful	Public	Electronic	All Departments	
14-GA-63	W2 FORMS These records document the annual gross wages, federal, state, and local taxes withheld for the purpose of reporting income taxes.	3 Fiscal Years	Public	Paper	Fiscal Office	
14-GA-64	WITHHOLDING FORMS These records consist of signed federal, state, and local tax withholding forms that are filed with the respective government agencies. NOTE: Current forms become part of the personnel file.	Until Superseded	Public	Paper	Fiscal Office	

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<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-HR-01	BACKGROUND INVESTIGATION WAIVER	Permanent	Public	Paper	Fiscal Office	
14-HR-02	BEAVERCREEK TOWNSHIP FIRE DEPARTMENT (BTFD) APPLICATION FORM (PERS0005)	Permanent	Public	Paper	Fiscal Office	
14-HR-03	COMPLIANCE POSTERS These are required by law to be posted at certain designated work areas, such as labor law posters (federal, state, local), public records policy, concealed weapons, and non-smoking.	Until No Longer Useful	Public	Paper	Township Bldgs.	
14-HR-04	CPAT WAIVER	Permanent	Public	Paper	Fiscal Office	
14-HR-05	CRIMINAL IDENTIFICATION AND INVESTIGATION FORM	Permanent	Public	Paper	Fiscal Office	
14-HR-06	DISCIPLINE FORM	Per Contract or Handbook	Public	Paper	Fiscal Office; Fire Admin	
14-HR-07	EMPLOYEE ASSISTANCE PROGRAM (EAP) These records include statistical reports and the contract with the local healthcare agency providing the service. This may include program information, correspondence, and other related records, but does not include medical records. NOTE: The "public" designation pertains only to general information. Any material considered a "medical record" as defined in Public Records law is not subject to disclosure. See R.C. §149.43(A)(3).	2 Years	Public (See note)	Paper	Fire Admin	

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14-HR-08	EMPLOYEE INJURY RECORDS These records consist of any reports of accidents or injuries involving the employee. Retain in the employee's personnel file unless the injury results in a workers' compensation claim; at that point it is to be maintained in a BWC file for that employee. NOTE: The "public" designation pertains only to general information. Any material considered a "medical record" as defined in Public Records law is not be subject to disclosure. See R.C. §149.43(A)(3).	Permanent	Public (See note)	Paper; Electronic	Fiscal Office/ Fire Admin	
14-HR-09	FIRST REPORT OF INJURY FORM (ADMINBWC) NOTE: Any material considered a "medical record" as defined in Public Records law is not subject to disclosure. See R.C. 149.43(A)(3).	15 Years	Public (See note)	Paper	Fire Admin	
14-HR-10	GRIEVANCES These document employee grievances against the Township and the resolution of the grievance.	5 Years	Public	Paper	Fiscal Office; Maintenance; Fire Admin	
14-HR-11	HEALTH PLAN APPLICATIONS These records include applications for employee benefits such as health, dental, vision, long-term disability, accident, and flexible spending plans. Keep in employee's personnel file until superseded by a new application. NOTE: The "public" designation pertains only to general information. Any material considered a "medical record" under Public Records law is not subject to disclosure. See R.C. §149.43(A)(3). In the case of firefighter/EMT's, the following is not subject to disclosure: any information which discloses the address of the actual personal residence of the individual, except for the state or political subdivision in which the individual resides; social security numbers; residential or emergency phone numbers; bank accounts, debit cards, charge cards, or credit card numbers; the name of any beneficiary of employment benefits; the amount of any employment benefit deductions, unless required by state or federal law; personal information regarding one's spouse, former spouse, or any children. See R.C. §149.43 (A)(1)(p) and R.C. § 149.43 (7)(a-g).	Until Superseded	Public (See note)	Paper	Fiscal Office	
14-HR-12	HEPATITIS B VACCINATION DECLINATION	Permanent	Public	Paper	Fire Admin	

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14-HR-13	I-9 FORMS	3 Years	Public	Paper	Fiscal Office	
<p>These records are Federal I-9 forms which record verification by employers of identity and immigration status of all new employees. Federal code 8 CFR 274.A.2 (1998) requires that employers maintain signed copies of I-9 forms for 3 years after the date of hire or one year after termination, whichever is later. Maintained with other hiring documents in employee's personnel file.</p>						
14-HR-14	INTERVIEW MATERIALS FOR NON-HIRES	4 Years	Public	Paper	Fire Admin	
<p>These records include applications, correspondence, interview notes, and any other material related to the interview process for job candidates who were not hired for an open position.</p>						
14-HR-15	JOB DESCRIPTIONS	Until Superseded	Public	Paper; Electronic	Fiscal Office	
<p>These records document job classification systems and positions. They may include research, surveys, or review done to create job descriptions, as well as job classifications and selection criteria.</p>						
14-HR-16	LABOR MANAGEMENT COMMITTEE	7 Years	Public		Fire Admin	
<p>These records document the activities of this committee. This may include meeting minutes, correspondence, new procedures, and other related records.</p>						
14-HR-17	MEDICAL CERTIFICATION FORM (PERS0004)	15 Years	Public (See note)	Paper	Fire Admin	
<p>NOTE: The "public" designation pertains only to general information. Any material considered a "medical record" as defined under Public Records law is not subject to disclosure. See R.C. §149.43(A)(3).</p>						
14-HR-18	POST ACCIDENT OR REASONABLE SUSPICION DRUG TESTING FORM (PERS0018)	Permanent	Public (See note)	Electronic	Fire Admin	
<p>NOTE: The "public" designation pertains only to general information. Any material considered a "medical record" as defined under Public Records law is not subject to disclosure. See R.C. §149.43(A)(3).</p>						

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HUMAN RESOURCES

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-HR-19	UNION CONTRACT NEGOTIATION FILES	7 years	Public	Paper; Electronic	Fire Admin	
<p>The records document the negotiations and resulting contract with employee labor unions and are used for referral in subsequent negotiations. They may include the following: salary and benefit schedules, ground rules proposals and counter proposals, secondary negotiations, meeting minutes or notes, any agreements, draft contracts with changes, and the final contract.</p>						
14-HR-20	WORKERS' COMPENSATION FILES	Permanent	Public	Paper	Fire Admin	
<p>These records document any claims made for workers' disability compensation benefits. They may consist of a copy of the report of the incident/injury made by the employee (original sent to insurer) and a copy of all reports from the occupational health provider. Includes litigation documents.</p> <p>NOTE: The "public" designation only pertains to general information. Any material defined as a "medical record" under Public Records law is not subject to disclosure. R.C.§149.43(A)(3).</p>						

INFORMATION TECHNOLOGY

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-IT-01	ELECTRONIC EQUIPMENT INVENTORIES These records list computers, software licenses, and peripheral equipment used by the Township and its employees, as well as servers, network and telecommunications equipment. They may be current inventories, item specific (brand, age, specifications), or list items that are no longer useful to the Township.	1 Year	Public	Electronic	Server Room	
14-IT-02	HYPERLINKS - WEBSITE These are informal and temporary in nature and are used to link information, such as bookmarks.	Until No Longer Useful	Public	Electronic	Server Room	
14-IT-03	NETWORK USAGE LOGS These contain information about the use of network services. The logs may include network operating system logs (such as NT security logging, etc.) or other network monitoring (such as intrusion detection devices, modem pool logs, central web cache logs, network flows generated by routers, firewall logs, DHCP logs, email server logs, web server logs, UNIX system logs, etc.) Retain for an extended period if the records are needed to meet other issues (e.g., billing, statistics).	90 days	Public	Electronic	Server Room	
14-IT-04	SECURITY BACKUP & RECOVERY COPIES OF ELECTRONIC RECORDS OR PROGRAMS These are copies of master files, databases, spreadsheets or other electronic documents. They include copies of programs or instructions necessary to retrieve copied information.	1 year	Public	Electronic	Fire Admin	
14-IT-05	SERVER SECURITY REPORTS These may include the following reports and can be in electronic or paper format: daily events, info-storage violations, info-storage log, data set traces, logging and violations, daily by-pass label processing, resource tracing, and violation for all platforms and applications.	Until No Longer Useful	Public	Electronic	Server Room	

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INFORMATION TECHNOLOGY

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-IT-06	SOFTWARE These records include the original discs and documentation of software used in the daily functioning of the Township. Retain until no longer supported by the IT Department.	Until No Longer Useful	Public	Electronic	Server Room	
14-IT-07	SYSTEM MANAGEMENT OR CONTROL RECORDS These are the logs, journals, reports, and other supporting paperwork required to operate, manage, and control larger computer systems. These records are involved solely with the administration of a system.	Until No Longer Useful	Public	Electronic	Server Room	
14-IT-08	TOWNSHIP WEBSITE May include online information about services, hours, Township events or programs, information of a transient nature, or links to reference resources. NOTE: Hosted and maintained by a third party ISP; information is kept for 90 days .	See Note	Public	Electronic	ISP	
14-IT-09	USER ACCOUNTS These accounts give Township employees and elected officials access to email, calendars and file space on the network server. The file may include names, titles, locations, and phone numbers. Retain for length of employment or elected term.	Length of Employment/ Elected Term	Public	Electronic	Server Room	

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RECORDS COMMISSION

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-RC-01	<p>RECORDS COMMISSION DOCUMENTS</p> <p>These records include all documents relating to the administrative duties of the commission, which is made up of the Chair of the Board of Trustees and the Fiscal Officer. May include meeting minutes, correspondence, public records policy, records retention and disposal schedules (RC-2), one-time disposal forms (RC-1), disposal forms (RC-3), or other related documents.</p>	Permanent	Public	Paper; Electronic	Fiscal Office	
14-RC-02	RECORDS RETENTION MANUAL	Until Superseded	Public	Paper; Electronic	Fiscal Office	

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Schedule of Records Retention and Disposition (RC-2)

ROAD/MAINTENANCE

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-RM-01	EASEMENTS These records document easements maintained by the Township and may include drainage easements, access easements and conservation easements, as well as other types of easements.	Permanent	Public	Paper	Zoning; Road	RC-3 Required
14-RM-02	MAINTENANCE RECORDS These records document regular maintenance and repairs for all Township vehicles and equipment. NOTE: These records are maintained in database form only.	Life of equipment	Public	Paper; Electronic	Maintenance Office	
14-RM-03	ROAD IMPROVEMENTS RECORDS These records contain information regarding the construction, reconstruction, resurfacing, or improvement of Township roads and may include accounts of receipts and expenditures, including dates, items of receipts, and amount. NOTE: These expenditures will also be noted in the official Township meeting minutes. These records are kept in database form only.	Permanent	Public	Paper; Electronic	Fiscal Office	RC-3 Required
14-RM-04	ROAD MILEAGE/LOG REPORTS These records document the miles of roads within the Township.	Permanent	Public	Paper	Fiscal Office	
14-RM-05	ROAD RECORDS These records contain information regarding the establishment, alteration, or vacation of public roads and may include the name, date, petition filed, petitioners, record of hearings on the petitions, surveys and reports, record of lands to be appropriated for the improvement showing owner, acres owned, quantity of land to be appropriated, and resolutions granting or rejecting the petition. May also include plats and maps and accounts.	Permanent	Public	Paper	Fiscal Office	RC-3 Required

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ROAD/MAINTENANCE

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-RM-06	SUPPLY REQUISITION FORMS These records are used to order supplies for the various Township offices and the fire stations.	1 Year	Public	Paper; Electronic	Road	
14-RM-07	WORK REQUESTS These records contain the date of the request, location, employees assigned, work done, completion date, follow-up comments, and time spent on the job.	3 Years after completion	Public	Electronic	Road	

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Schedule of Records Retention and Disposition (RC-2)

ZONING

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-ZON-01	BOARD OF ZONING APPEALS CASE FILES These files may include the original application, drawings, letters from neighbors in support of or against the proposed zoning, addresses of citizens/properties within 500 ft. of the proposed zoning, legal opinions, reports, studies and any other documentation relevant to the case.	Permanent	Public	Paper; Electronic	Zoning Office	RC-3 Required
14-ZON-02	CEASE AND DESIST ORDERS	5 Years, pending no further action	Public	Paper	Zoning Office	
14-ZON-03	COMPLAINT FORMS -ZONING Arranged by address. May include name of complainant, relevant dates, name of offender and address, location and nature of violation, investigation and remarks, name of investigator, disposition, re-inspection information and recommendations.	5 Years, provided no action pending	Public	Paper	Zoning Office	
14-ZON-04	GRANT APPLICATIONS	5 Years	Public	Paper	Zoning Office	
14-ZON-05	MEETING MINUTES Arranged chronologically by date; includes agendas and sign-in sheets; may include documentation of non-recorded work sessions and attachments not related to specific cases.	Permanent	Public	Paper	Zoning Office	RC-3 Required
14-ZON-06	PERMIT RECORDS These records include the original application and may include supporting documentation.	Permanent	Public	Paper; Electronic	Zoning Office	

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Schedule of Records Retention and Disposition (RC-2)

ZONING

<u>Record Series #</u>	<u>Record Series Title</u>	<u>Retention Period</u>	<u>Confidentiality</u>	<u>Medium</u>	<u>Location</u>	<u>RC-3 Required?</u>
14-ZON-07	PRE-APPLICATION FILES These files represent proposals brought before the Zoning Commission prior to actual submittal of an application. Pre-applications are generally discussed in informal work sessions that are not recorded and occasionally in formal meetings. NOTE: If the process moves forward and an application is submitted, a case number will be assigned and the pre-application material will be incorporated into the case file.	5 Years, or merge with case file	Public	Paper	Zoning Office	
14-ZON-08	RECORDINGS OF ZONING MEETINGS These records are recordings of the proceedings of public zoning meetings. The information is incorporated into the official zoning minutes.	1 Year	Public	Audio Recording	Township Server	
14-ZON-09	ZONING COMMISSION CASE FILES These files may include the original application, drawings, letters from neighbors in support of or against the proposed zoning, addresses of citizens/properties within 500 ft. of the proposed zoning, legal opinions, reports, studies and any other documentation relevant to the case.	Permanent	Public	Paper; Electronic	Zoning Office	RC-3 Required