



Ohio History Connection
State Archives of Ohio
Local Government Records Program
800 E. 17th Avenue
Columbus, Ohio 43211-2474
614.297.2553
localrecs@ohiohistory.org
www.ohiohistory.org/lgr

OHIO HISTORY CONNECTION
MARCH 07 2024
STATE AND LOCAL
GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)– Part 1

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

Section A and Section B must be filled out and signed by local government before submission to the State Archives

Section A: Local Government Unit

Henry County General Health District

419-599-5545

(Local Government Entity)

(Unit)

[Signature]

Joy Ermie

Health Commissioner

March 4, 2024

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

Henry County Commissioners

Records Commission

419 592 4876

(Telephone Number)

1853 Oakwood Ave. Napoleon Oh

43945

Henry

(Address)

(City)

(Zip Code)

(County)

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

Commissioners@henrycountyoio.gov

I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, or otherwise disposed of in violation of these schedules and that no record will be knowingly disposed of which pertains to any pending legal case, claim, action, or request. This action is reflected in the minutes kept by this commission.

[Signature]

3-7-2024

Records Commission Chair Signature

Date

Section C: Ohio History Connection - State Archives

Government Records Archivist

3/15/2024

Signature

Title

Date

Section D: Auditor of State

Records Manager

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

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Required by LGRP
Administration/Health Department					
HD-01	Agenda A list of items to be discussed and/or acted upon during a public meeting.	2 Years	Paper and/or Electronic		<input type="checkbox"/>
HD-02	Annual Inventory Departmental inventory of all the materials, machinery, tools, and other county supplies under the jurisdiction of each county office or department.	3 years	Paper and/or Electronic		<input type="checkbox"/>
HD-03	Annual Reports A report containing substantive information of operations, policies, procedures, and planning.	Permanent	Paper		<input checked="" type="checkbox"/>
HD-04	Audiovisual, Public Relations & Training Materials Materials and resources compiled or created for presentations, public relations events and/or training exercises.	Until information is superseded, obsolete, or replaced. Appraise for historical value.	Paper and/or Electronic		<input type="checkbox"/>
HD-05	Bulletins, Posters, and Notices to Employees Announcements and informational notices including unsolicited announcements related to job functions.	Until no longer administrative value	Paper and/or Electronic		<input type="checkbox"/>
HD-06	Communication Records— (Correspondence)	Retain according to content. Ensure metadata retained if applicable.	Paper and/or Electronic		<input type="checkbox"/>
HD-06A	Transient Routine communications which convey information of temporary	Until no longer of administrative value	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Required by LGRP
Administration/Health Department					
	importance in lieu of oral communication.				
HD-06B	General Documents the operations of the office and may include non-routine requests for information. Informative and does not attempt to influence policy.	One Year	Paper and/or Electronic		<input type="checkbox"/>
HD-06C	Executive Documents the administration of the office and may contain information concerning agency policies, fiscal and personnel matters.	Three years; file with related records if content requires longer retention; appraise for historical value.	Paper and/or Electronic		<input type="checkbox"/>
HD-07	Contact Lists List of individuals and email addresses and/or postal mail addresses for distribution.	Until updated, superseded, or obsolete	Paper and/or Electronic		<input type="checkbox"/>
HD-08	Contracts Legal agreements with individuals, organizations, or entities to procure goods and/or services. (ORC 2305.06)	6 years after termination of contract. Unless specified by contract.	Paper and/or Electronic		<input type="checkbox"/>
HD-09	Directories/Lists/Rosters Lists including such information as employee phone numbers, e-mail addresses, staff roster, committee membership, assignments, schedules.	Until superseded, obsolete, or replaced	Paper and/or Electronic		<input type="checkbox"/>
HD-10	Drafts/Transient Records Preliminary working documents and other documents which serve to convey information of temporary importance in lieu of oral communication.	Until no longer of administrative value	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Required by LGRP
Administration/Health Department					
HD-11	Equipment Maintenance Records, Including Inventory. Files documenting ownership, warranties, routine maintenance, temperature logs, calibrations, and repair of HD owned equipment	Life of the equipment	Paper and/or Electronic		<input type="checkbox"/>
HD-12	Fax-Messages	Treat as communication records and retain as needed	Paper and/or Electronic		<input type="checkbox"/>
HD-13	Fee Schedules Fees for goods or services provided by the Health Department.	Until updated, superseded, or obsolete	Paper and/or Electronic		<input type="checkbox"/>
HD-14	Fee Establishment Cost Methodology for State and Non-State Audited Programs. Records supporting the methodology for establishing fees for State and Non-State audited programs.	Five Years and Superseded	Paper and/or Electronic		<input type="checkbox"/>
HD-15	Grant Application (Not Funded) Unsuccessful applications for grant funding	One Year	Paper and/or electronic		<input type="checkbox"/>
HD-16	Grants Files – Federal, State or Local documents, the application, evaluation, awarding, monitoring, reports and tracking of grants received (includes both fiscal and programmatic aspects of grants).	Maintain records as required by grant; if retention unspecified, five years provided all State or Federal audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved. Keep final fiscal and program reports permanently.	Paper and/or Electronic		<input checked="" type="checkbox"/> (Permanent)

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Required by LGRP
Administration/Health Department					
HD-17	Health & Wellness Records Comprehensive health program designed to maintain high level of employee wellbeing. Includes program activity details, budget, and employee participation.	2 years	Paper and/or Electronic		<input type="checkbox"/>
HD-18	HIPAA Business Associate Agreements Agreements with outside agencies regarding protected health information.	6 years after last contact.	Paper and/or Electronic		<input type="checkbox"/>
HD-19	Insurance Policies/Records Documents listing terms and conditions between county and insurance providers. As well as fiscal and administrative records generated in the administration of insurance policies.	Two years after expiration of associated policy, provided all claims settled and appeals exhausted (ORC 2305.10)	Paper and/or Electronic		<input type="checkbox"/>
HD-20	Legal Advertisements/Notices Legal announcements to inform the public of meetings, hearings, bids, auctions, or other events.	One year or until superseded.	Paper and/or Electronic		<input type="checkbox"/>
HD-21	Manuals, Handbooks Documents related to activities and operations of a department, office, or agency. May include rules regarding behavior, instructions for operating equipment, policies, procedures, processes, etc.	Until superseded, obsolete, or replaced, appraise for historical value	Paper and/or Electronic		<input type="checkbox"/>
HD-22	Material Safety Data Sheet Information about properties of chemicals, including physical data, toxicity, first aid, storage, disposal processes, etc.	30 years. (OSHA Standard)	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

Page 6 of 27

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Required by LGRP
Administration/Health Department					
HD-23	Media Clippings Gathering of media documentation of Health Department activities.	5 Years	Paper		<input type="checkbox"/>
HD-24	Minutes of Meetings	See retention periods listed below			<input type="checkbox"/>
HD-24A	Minutes of Meetings-Drafts/Notes	Until official minutes are approved	Paper and/or Electronic		<input type="checkbox"/>
HD-24B	Minutes of Meetings-Board of Health	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
HD-24C	Minutes of Meetings – District Advisory Council (DAC)	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
HD-24D	Minutes of Meetings – Coalitions	5 years then appraise for historical value	Paper and/or electronic		<input checked="" type="checkbox"/> (Historical)
HD-24E	Minutes of Meetings – Internal Meetings (Departmental, Workgroups, Programmatic) Records of internal agency or department meetings. Does not include the records of public meetings. Can include agendas, notes, minutes, electronic recordings, etc.	Destroy when no longer administratively necessary	Paper and/or electronic		<input type="checkbox"/>
HD-25	Delivery/Packing Slips Documents received when accepting goods from a carrier or vendor.	Until no longer of administrative value	Paper		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Required by LGRP
Administration/Health Department					
HD-26	Public Record Requests/Logs- Requests to inspect and review public records, as well as the listing of public records requests received by a public office and the actions taken to respond to the requests. (ORC 149.43)	3 Years	Paper and/or Electronic		<input type="checkbox"/>
HD-27	Record Retention and Disposition Forms Records, RC-1, RC-2, and RC-3 forms.	Permanent	Paper and Electronic		<input type="checkbox"/>
HD-28	Resolutions – Board of Health Official written motion documenting policy development and decisions.	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
HD-29	Sign-in Sheets Registers or logs used to track arrivals and departures from meetings. Includes Participant Sign-In Sheets.	One year provided no action pending.	Paper and/or Electronic		<input type="checkbox"/>
HD-30	Speeches/Presentations Written and/or recorded materials distributed when speaking to a group or press conference concerning an office and/or its operations.	Until no longer of administrative value/ appraise for historical value	Paper and/or Electronic		<input type="checkbox"/>
HD-31	Statistical Reports Monthly/Quarterly/Annual	Until incorporated into annual report.	Paper and/or Electronic		<input type="checkbox"/>
HD-32	Surveys and Questionnaires Records collected from employees or public to assess how an event or program is perceived to determine if improvements or changes should be made.	Until no longer of administrative value	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

Page 8 of 27

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Required by LGRP
Administration/Health Department					
HD-33	Travel Requests/Expense Reports Requests to travel and reimbursement for employee travel.	3 years, provided audited	Paper and/or Electronic		<input type="checkbox"/>
HD-34	Vehicle Operations File Includes, but is not limited to, service records, operation maintenance reports of licensed vehicles, warranty and guaranty statements, operating manual, accident reports, repair records, milage and usage logs, registrations, and title copies.	Until vehicle sold or disposed of	Paper and/or Electronic		<input type="checkbox"/>
HD-35	Work Orders Requests asking for maintenance, assistance and/or services.	1 year	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Fiscal					
FIS-01	Annual budgets including preparation documents.	Retain until audited by Auditor of State and audit report is released and all discrepancies are resolved then destroy	Paper and/or Electronic		<input type="checkbox"/>
FIS-02	Application for State Subsidy Annual application filed by local health department to receive state subsidy funds.	3 years	Paper and/or Electronic		<input type="checkbox"/>
FIS-03	Attendance Records Employee attendance at work including leave requests, administrative timesheets.	3 years provided audited	Paper and/or Electronic		<input type="checkbox"/>
FIS-04	Audit Reports (Federal, State, and Internal) Financial examinations and reports issued by the Federal Government, Auditor of State, independent auditing agencies or conducted internally. (ORC 117.26)	5 years	Paper and/or Electronic		<input type="checkbox"/>
FIS-05	Bids (successful) ORC 2305.06	6 years after termination of contract	Paper and/or Electronic		<input type="checkbox"/>
FIS-06	Bids (unsuccessful)-not awarded	2 years after letting of the contract	Paper and/or Electronic		<input type="checkbox"/>
FIS-07	Budget Preparation Documents (Working Papers) Preparation documents used to create annual budget.	Destroy once annual budget is Board of Health approved.	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Fiscal					
FIS-08	Coronavirus Relief Fund Payment Records (Cares Act 2020)	Retain for 5 years after final payment is made using Coronavirus Relief Monies. (US Department of Treasury Memorandum OIG-CA-20-021)	Paper and/or Electronic		<input type="checkbox"/>
FIS-09	Financial Records Records pertaining to financial transactions including but not limited to, accounts receivable and accounts payable; bank statements; pay-in to treasury; purchase orders; requisitions; invoices; detail reports; cash and account books; receipts; canceled checks; vouchers; appropriation adjustments; transfers; monthly expenditure statements; petty cash; donation reports; etc.	Retain until audited by Auditor of State and audit report is released and all discrepancies are resolved then destroy.	Paper and/or Electronic		<input type="checkbox"/>
FIS-10	Monthly Financial Activity Reports/Spreadsheets	5 years	Paper and/or Electronic		<input type="checkbox"/>
FIS-11	Patient Billing Records Records related to billing of patients	5 years provided audited	Paper and/or Electronic		<input type="checkbox"/>
FIS-12	Patient Billing Records: Medicare/Medicaid Records related to billing of Medicare and/or Medicaid	5 years provided audited	Paper and/or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Fiscal					
FIS-13	Payroll Records Department copies including but not limited to time sheets, overtime documentation records, and timecards (ORC 4111.14)	3 years, provided audited	Paper and/or Electronic		<input type="checkbox"/>
FIS-14	Purchase Orders, Requisitions and Other Documents Related to Purchase of Goods or Services.	Retain until audited by Auditor of State and audit report is released and all discrepancies are resolved, then destroy.	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Human Resources					
HR-01	Accruals Tracks vacation, sick, and compensatory time used by employee. Final accrual report kept in personnel file.	3 years	Paper and/or Electronic		<input type="checkbox"/>
HR-02	Badges and ID's Employee identification badges and keyless entry devices and related records	Confiscate upon employment termination or when obsolete, then destroy	Paper and/or Electronic		<input type="checkbox"/>
HR-03	Continuing education certifications / class / seminars / training attendance records Includes professional licenses, certifications, trainings, and other documents noting advancement in education related to job position	Place in personnel file	Paper and/or Electronic		<input type="checkbox"/>
HR-04	Disciplinary Hearings A proceeding where an issue of employee discipline is heard, and evidence is presented to help determine the issue.	See retention periods listed below			<input type="checkbox"/>
HR-04A	A) Audio and video recordings	One year	Electronic		<input type="checkbox"/>
HR-04B	B) Report of proceedings	Place in personnel file	Paper and/or Electronic		<input type="checkbox"/>
HR-04C	C) Transcripts	Five Years	Paper and/or Electronic		<input type="checkbox"/>
HR-05	Employment Application/Resume-Successful	Place in Personnel file	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Human Resources					
HR-06	Employment Application/Resumes-Unsuccessful/Not Hired	2 Years	Paper and/or Electronic		<input type="checkbox"/>
HR-07	Family Medical Leave Act (FMLA Records) Disclosures and correspondence to employees utilizing leave under FMLA.	3 Years	Paper and/or Electronic		<input type="checkbox"/>
HR-08	Grievances Formal complaints and responses regarding work, conduct, interpersonal relations, or disciplinary actions towards an employee or the employer.	3 years after resolution or final response.	Paper and/or Electronic		<input type="checkbox"/>
HR-09	Incident Reports	6 years to permanent based on type. See retention periods listed below	Paper and/or Electronic		<input type="checkbox"/>
HR-09A	Incident Report-Personal or property damage involving a county vehicle or occurring on county property.	6 years provided no action pending	Paper and/or Electronic		<input type="checkbox"/>
HR-09B	Incident Report-Bodily Injury to Non-Employee.	6 years provided no action pending	Paper and/or Electronic		<input type="checkbox"/>
HR-09C	Incident Reports-Employee.	Permanent in Medical File	Paper and/or Electronic		<input type="checkbox"/>
HR-10	Intern Files Records of students who served paid internships	Retain portions used to verify employment, retirement, or OPERS, contributions until 50 years after separation. Purge all other records 6 years after separation.	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Human Resources					
HR-11	Job Descriptions Descriptions of employee positions and job class. May also include supporting documentation.	Until revised, superseded, or obsolete	Paper and/or Electronic		<input type="checkbox"/>
HR-12	Job Postings Records created during recruitment process. May contain employment applications, resumes, background checks of applicants not hired or interview notes.	2 years	Paper and/or Electronic		<input type="checkbox"/>
HR-13	Organizational Charts A diagram that shows the structure of an organization and the relationship, relative ranks of its parts and positions/jobs.	Until Superseded	Paper and/or Electronic		<input type="checkbox"/>
HR-14	Personnel Files Files maintained for each employee which may include, but is not limited to, items such as application/resume, new hire documentation, background checks, positions descriptions, personnel actions, training records, emergency contact information, letters of commendation, policy and procedure acknowledgements, performance evaluations, disciplinary documents, separation records, and user agreements.	Retain portions used to verify employment, retirement, or OPERS contributions until 50 years after separation. Purge all other records 6 years after separation.	Paper and/or Electronic		<input type="checkbox"/>
HR-15	Personnel Files – Medical Records pertaining to employee's medical insurance, conditions, etc., as they relate to their employment. Includes HIPAA, FMLA information.	7 years after termination	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Human Resources					
HR-16	Workers Compensation Claims Files covering claims made by employee for Workers Compensation benefits; includes claim, investigation, hearings, results, requirements, terms, and conditions, etc. (ORC 4123)	10 years after last activity	Paper and/or Electronic		<input type="checkbox"/>
HR-17	Volunteer Files Records of those who worked as volunteers, or who served unpaid internships. Can include, but is not limited to, applications, waiver forms, or background checks. Includes MRC volunteers.	3 Years after termination of service	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Community Health Services					
CHS-01	Audiovisual, Public Relations, and Training Materials Materials and resources compiled or created for presentations, public relations events and/or training exercises.	Until information is superseded, obsolete, or replaced. Appraise for historical value.	Paper and/or Electronic		<input type="checkbox"/>
CHS-02	Community Health Assessment Includes report on the current status of health conditions.	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
CHS-03	Community Health Improvement Plan Includes report on the strategies and objectives for improving health conditions in the county.	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
CHS-04	Management , Operations, and QI Reports Reports and /or feasibility studies including statistical analysis created to assess functions, projects, and programs.	Until superseded, obsolete, or replaced/appraise for historical value.	Paper and/or Electronic		<input checked="" type="checkbox"/> (Historical)
CHS-05	Photographs and image files Visual documentation of person, place, or event on various media, Media may include but is not limited to photographs and digital files.	Until no longer administrative value. Appraise for historical value	Paper and/or Electronic		<input checked="" type="checkbox"/> (Historical)
CHS-06	Press/News Releases Information disseminated to the public through media outlets.	5 years then appraise for historical value.	Paper and/or Electronic		<input checked="" type="checkbox"/> (Historical)
CHS-07	Publications (created by the Health Department) Brochures, flyers, and promotional material created by agency to inform public of services and functions.	Until superseded or obsolete	Paper and/or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Community Health Services					
CHS-08	Public Health Accreditation Files Documentation of the 5-year accreditation from PHAB.	Retain final documentation and report permanently. Retain working papers until next accreditation period.	Paper and/or Electronic		<input type="checkbox"/>
CHS-09	Disaster Plans Documents plans and procedures to protect and reestablish county operations in the event of a disaster.	Until updated or superseded	Paper and/or Electronic		<input type="checkbox"/>
CHS-10	Emergency Response Plans and Annexes Plans and annexes created to prepare for whenever a crisis, man-made or natural, disrupts operations, threatens life, or creates major damage within the county.	Until updated, obsolete, or superseded.	Paper and/or Electronic		<input type="checkbox"/>
CHS-11	Exercise Documents Records documenting a simulated emergency response including but not limited to, After Action Reports (AAR), Improvement Plans (IP)	5 years	Paper and/or Electronic		<input type="checkbox"/>
CHS-12	Real World Emergency Response Records Records documenting an actual emergency response, including but not limited to After Action Reports (AAR) and Improvement Plans (IP)	10 year	Paper and/or Electronic		<input type="checkbox"/>
CHS-13	Population Health Data Data collected for the community health assessment, health improvement plan, and other population health metrics.	Permanent	Electronic		<input checked="" type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

Page 18 of 27

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Community Health Services					
CHS-14	MyPlate Vouchers Vouchers redeemed from nutrition program at local grocery stores	Until no longer of administrative value or submission of invoice	Paper		<input type="checkbox"/>
CHS-15	Health Education Program Curriculum Materials created, purchased, or obtained for health education programming.	Until information is superseded, obsolete, or replaced. Appraise for historical value.	Electronic and/or Paper		<input checked="" type="checkbox"/> (Historical)
CHS-16	Intake Forms Project DAWN (Deaths Avoided With Naloxone)	1 Year	Paper		<input type="checkbox"/>
CHS-17	Webpage and layouts	Until updated, or superseded or obsolete	Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Environmental Health Services					
EH-01	Animal Bite Case File/Reports Includes animal bite investigations, reports, and lab reports.	5 years provided audited	Paper and/or Electronic		<input type="checkbox"/>
EH-02	Application for licenses and Permits- All Types Food, Body Art, Pool/Spa, and Campgrounds. New and Renewal Licenses.	5 years provided audited	Paper and/or Electronic		<input type="checkbox"/>
EH-03	Blueprint/Facility/Operation Plans Approved plans for food, camps, pools/spas, body art establishments, and other qualifying establishments required to meet health and safety standards.	5 years after facility closes, provided audited	Paper and/or Electronic		<input type="checkbox"/>
EH-04	Certifications/Transmittals Records documenting licenses issued and the portion of fees remitted to ODH or ODA.	5 years provided audited	Paper and/or Electronic		<input type="checkbox"/>
EH-05	Inspection Reports/Records Records detailing the results of public health inspections for facilities and establishments regarding food, pools/spas, camps, schools, and body art establishments.	5 year after date of inspection provided all violations have been corrected	Paper and/or Electronic		<input type="checkbox"/>
EH-06	Nuisance Investigations and Reports Documentation of investigations into complaints of property violations.	5 years after situation corrected	Paper and/or Electronic		<input type="checkbox"/>
EH-07	Private Water System Permit Records Inspections, permits, and installation records.	5 years after system is abandoned	Paper and Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Environmental Health Services					
EH-08	Private Water Test Results	2 years	Paper and/or Electronic		<input type="checkbox"/>
EH-09	Sewage Contractor Registration Records Application, Insurance verification, vehicle inspections, CEU's, Bond Information.	5 Years	Paper and/or Electronic		<input type="checkbox"/>
EH-10	Sewage System Permit Records Inspections, designs, permits, and installation records.	5 years after sewage disposal system ceases operation	Paper and/or Electronic		<input type="checkbox"/>
EH-11	Sewage System Operation and Maintenance Records Including but not limited to operation permits, operation evaluation, and pumping records.	5 years and superseded	Paper and/or Electronic		<input type="checkbox"/>
EH-12	Solid Waste Site Inspections (Ohio EPA registered facilities)	Permanent	Paper and/or Electronic		<input checked="" type="checkbox"/>
EH-13	Subdivision and New Lot Approval Documentation of review of plans for subdivisions. May include blueprints, correspondence, and soil characteristics of proposed subdivisions.	5 Years	Paper and/or Electronic		<input type="checkbox"/>
EH-14	Variance Requests Documenting requests for a change to rule or regulations reenforced by the Health Department.	Permanent	Paper and/or Electronic		<input checked="" type="checkbox"/>
EH-15	Water Hauler Contractor Registration Records Application and Inspections.	5 Years	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Public Health Nursing					
PHN-01	Adult Dental Records Medical records, including charts, patient files, clinical services, x-rays, etc.	6 years after last contact	Paper and/or electronic		<input type="checkbox"/>
PHN-02	Child (0-18) Dental Records Medical records, including charts, patient files, clinical services, x-rays, etc.	Until child reaches age 24	Paper and/or electronic		<input type="checkbox"/>
PHN-03	Adult Home Health/Hospice Records Medical records, including charts, patient files, services, lab results, medical testing, etc.	6 years after discharge	Paper and/or electronic		<input type="checkbox"/>
PHN-04	Child (0-18) Home Health/Hospice Records Medical records, including charts, patient files, services, lab results, medical testing, etc.	Until child reaches age 24	Paper and/or electronic		<input type="checkbox"/>
PHN-05	Adult Reproductive Health and Wellness Records Medical records, including charts, patient files, services, lab results, medical testing, etc.	6 years after last contact	Paper and/or electronic		<input type="checkbox"/>
PHN-06	Minor Reproductive Health and Wellness Records Medical records, including charts, patient files, services, lab results, medical testing, etc.	Until child reaches age 24	Paper and/or electronic		<input type="checkbox"/>
PHN-07	Bureau for Children with Medical Handicaps Records Records pertaining to families receiving Bureau for Children with Medical Handicaps services through the Health District.	Until child reaches age 30	Paper and/or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Public Health Nursing					
PHN-08	Clinical Standing Orders Directives, policies, and procedures for clinical services, including immunizations, naloxone, reproductive health and sexual health, and all other non-specified clinical based services.	7 years after rescinded or superseded	Paper and/or electronic		<input type="checkbox"/>
PHN-09	Communicable Disease Records Reports and investigations related to communicable disease within the Health District's jurisdiction.	6 years after last contact	Paper and/or electronic		<input type="checkbox"/>
PHN-10	Epidemiological Plans Public health surveillance and EPI investigation plan/manual	Until updated, superseded, or obsolete	Paper and/or Electronic		<input type="checkbox"/>
PHN-11	Immunization Records Immunizations administered to patients by the health district, including consent forms	Adults- 6 years Children- until age 24	Paper and/or electronic		<input type="checkbox"/>
PHN-12	Lead Investigation Records Case investigation, documentation, and records of children reported with elevated lead levels.	6 years	Paper and/or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Public Health Nursing					
PHN-13	Ohio Department of Health (ODH) and Vaccine For Children (VFC) Program Records All records relating to ODH and VFC program including, but not limited to, VFC screening, eligibility documentation, billing records, medical records that verify receipt of vaccine, vaccine ordering records, vaccine purchase, and accountability records, and supporting documentation for state audit.	3 years after termination of agreement; if adult, litigation, or other action is initiated during this period, retain records until action is concluded and all issues resolved or the three years, whichever is later provided audited.	Paper and/or electronic		<input type="checkbox"/>
PHN-14	Orders/Receipts for Drug Biologicals Both order and receipts of drugs/medications and biologicals, including immunizations.	3 years	Paper and/or electronic		<input type="checkbox"/>
PHN-15	Patient Health Records (Not Otherwise Specified) All patient medical records including charts, patient files, lab results, medical testing, clinical services, etc.	6 years after last contact (OAC 3701-83-11)	Paper and/or electronic		<input type="checkbox"/>
PHN-16	Prenatal/infant care records Medical records, including charts, patient files, services, lab results, medical testing, etc.	Until child reaches age 24	Paper and/or electronic		<input type="checkbox"/>
PHN-17	Quick Response Team Records Referral paperwork	6 years after last contact	Paper and/or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Public Health Nursing					
PHN-18	Tuberculosis Records – Negative Results All documentation and investigation documents for tuberculosis-negative test results and suspected cases deemed not a case.	6 years	Paper and/or electronic		<input type="checkbox"/>
PHN-19	Tuberculosis Case Records-Positive All documentation related to individuals resting positive for tuberculosis, including x-rays.	Until patient reaches age 100	Paper and/or electronic		<input type="checkbox"/>
PHN-20	Vaccine Reports Reports of individuals receiving vaccines, such as the influenza vaccine from the health district.	6 years	Paper and/or electronic		<input type="checkbox"/>
PHN-21	VAERS (Vaccine Adverse Event Reporting System) Records All documentation and records pertaining to VAERS submitted by Health Department staff.	10 years after electronic submission	Paper and/or electronic		<input type="checkbox"/>
PHN-22	Vision, Hearing, Lead, and Other Screening Records Screening results for vision, hearing, and lead tests. May be maintained as part of patient health record.	Adults- 6 years Children- until age 24	Paper and/or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Vital Stats					
VIT-01	Affidavits for Birth and Death Certificates Corrections made to birth or death certificates including address, social security number, etc.	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
VIT-02	Birth Certificates Copies of birth certificates for all births in County. Originals maintained by Ohio Department of Health.	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
VIT-03	Birth/Death Certificate Applications and Daily Log Sheets Applications for certified copies of birth and death certificates.	3 years after ODH Audit	Paper and/or Electronic		<input type="checkbox"/>
VIT-04	Burial Permits Permits issued to funeral director or person in charge of internment.	5 Years	Paper and/or Electronic		<input type="checkbox"/>
VIT-05	Death Certificates Formal documents verifying that a person has died.	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
VIT-06	Fatality Investigation Records Review and reports, including, but not limited to, child fatality review, overdose, and suicide review occurring in the county.	5 Years	Paper and/or Electronic		<input type="checkbox"/>
VIT-07	Fetal Death Reports Formal document verifying stillbirth.	Permanent	Paper and Electronic		<input checked="" type="checkbox"/>
VIT-08	VA/Government Request Forms Request for birth and or death certificates.	1 year provided audited	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Vital Stats					
VIT-09	Vital Statistics Certificate of Service Documentation related to out of state deaths once they are brought back into state.	1 Year	Paper and/or Electronic		<input type="checkbox"/>
VIT-10	Vital Statistics Reports (monthly/quarterly) Report sent to Ohio Department of Health that include the number of births and deaths recorded each month.	6 months after ODH audit	Paper and/or Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Audit or of State or LGRP	(6) RC-3 Require d by LGRP
Help Me Grow (HMG)					
HMG-1	Help Me Grow/Breastfeeding Charts Exited families from program, closed files. May include but is not limited to contact logs, tracking logs, referral forms, release forms, supervision logs etc.	Six years from the date of receipt of payment for the service or until an audit is completed whichever is longer.	Paper and/or Electronic		<input type="checkbox"/>
HMG-2	Child Passenger Safety Seats Applications (per Ohio Department of Public Safety) Records maintained of individuals receiving no cost child passenger safety seats.	7 years	Paper and/or Electronic		<input type="checkbox"/>
Henry County Cares					
HCC-1	Patient Health Records (Not Otherwise Specified) All patient medical records including, but not limited to, referrals, insurance information, charts, patient files, lab results, medical testing, clinical services, etc.	6 years after last contact (OAC 3701-83-11)	Paper		<input type="checkbox"/>
HCC-2	Referrals Referrals of noneligible clients, clients unable to contact, or clients that do not accept services.	3 years	Paper		<input type="checkbox"/>

Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C

