



Ohio History Connection  
 State Archives of Ohio  
 Local Government Records Program  
 800 E. 17th Avenue  
 Columbus, OH 43211-2474  
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[www.ohiohistory.org/lgr](http://www.ohiohistory.org/lgr)

## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

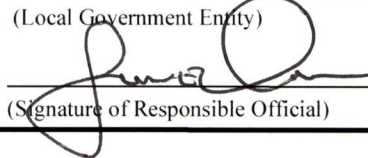
**Section A and Section B must be filled out and signed by local government before submission to the State Archives**

### Section A: Local Government Unit

#### Union County General Health District

(Local Government Entity)

(Unit)

  
 (Signature of Responsible Official)

**Jason Orcena**  
 (Name)

**Health Commissioner**  
 (Title)

**16 Oct 2024**  
 (Date)

### Section B: Records Commission

*See ORC 149.68 – ORC 149.412 for Records Commission Information*

Union County Records Commission

937-645-4177

(Telephone Number)

128 South Main Street  
 (Address)

Marysville  
 (City)

43040  
 (Zip Code)

Union  
 (County)

To have this form returned to the Records Commission electronically, email address: [sbadenhop@unioncountvohio.gov](mailto:sbadenhop@unioncountvohio.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.

  
 Records Commission Chair Signature

**10-23-24**  
 Date

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

\_\_\_\_\_  
 Signature

**Electronic Records Archivist**  
 Title

**11/07/2024**  
 Date

### Section D: Auditor of State

\_\_\_\_\_  
 Signature

**Records Manager**  
 Title

\_\_\_\_\_  
 Date

**Please Note:** The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form



## RECORDS RETENTION SCHEDULE (RC-2)

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Union County General Health District  
(Local Government Entity)

General Records  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-101	Agendas <i>Records documenting items to be discussed during a meeting</i>	1 year	Paper/Electronic		<input type="checkbox"/>
HD24-102	Audiovisual, Public Relations & Training Materials <i>Materials and resources compiled or created for presentations, public relations events and/or training exercises</i>	Until information is superseded, obsolete, or replaced	Paper/Electronic		<input type="checkbox"/>
HD24-103	Audit Reports (Federal, State and Internal) <i>Financial and program examinations and reports issued by the Federal Government, State of Ohio, independent auditing agencies or conducted internally; including subsequent compliance reports</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-104	Awards <i>Certificates and awards given to or received by the Health Department</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-105	Backup Data <i>Computer generated backup tapes and data created, used and maintained for disaster recovery purposes</i>	Retain for system backup cycle then delete, erase or destroy data	Electronic		<input type="checkbox"/>
HD24-106	Badges/IDs and Badge/ID Records <i>Employee identification badges and electronic door unlocking devices and records related to the creation and maintenance of employee Badges/IDs</i>	Until no longer of administrative value or until updated, superseded or obsolete	Paper/Plastic/ Electronic		<input type="checkbox"/>
HD24-107	Blank Forms <i>Unused forms that are either obsolete and/or superseded</i>	Until obsolete or superseded	Paper/Electronic		<input type="checkbox"/>
HD24-108	Blue Prints and Drawings <i>Maps and plans created for construction, projects and/or events</i>	Until updated, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
HD24-109	Bulletins, Posters, Notices and Displays <i>Announcements and informational notices related to Health Department functions</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-110	Calendar (Desk/Appointment) <i>Calendars used to track meetings and events in conjunction with job functions</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-111	Claims and Litigation Records <i>Records related to legal claims against the Health Department and subsequent court proceedings if necessary</i>	5 years, after case is closed and appeals are exhausted	Paper/Electronic		<input type="checkbox"/>



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Union County General Health District  
(Local Government Entity)

General Records  
(Unit)

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HD24-112	Contracts and Agreements <i>Legal agreements with individuals, organizations or entities to procure goods and/or services</i>	6 years, after expiration (ORC 2305.06)	Paper/Electronic		<input type="checkbox"/>
HD24-113	Copies of Records <i>Internally duplicated records created for administrative convenience and/or reference</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-114	Correspondence <i>Communications from external and internal sources; documents actions, policies, procedures and programs</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-115	Correspondence (Transient) <i>Communications which serve to convey information of temporary importance in lieu of oral communication</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-116	Delivery Slips/Packing Slips <i>Documents received when accepting goods from a carrier or vendor</i>	Until no longer of administrative value	Paper		<input type="checkbox"/>
HD24-117	Disaster Plans <i>Plans and procedures to protect and re-establish operations in the event of a disaster</i>	Until obsolete or superseded	Paper/Electronic		<input type="checkbox"/>
HD24-118	Drafts and Notes <i>Preliminary working documents and convenience notes</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-119	E-Mailing/Mailing Lists <i>Lists of individuals and addresses for mail distribution</i>	Until updated, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
HD24-120	Electronic Mail (E-Mail) <i>Documents and messages sent, received and/or drafted using electronic mailing systems</i>	All electronic mail will be maintained in electronic format for 5 years	Electronic		<input type="checkbox"/>
HD24-121	Electronic Mail (E-Mail) (Separated Employees) <i>Documents and messages sent, received and/or drafted using electronic mailing systems</i>	All electronic mail will be maintained in electronic format for 3 years	Electronic		<input type="checkbox"/>
HD24-122	Fax (Documentation) <i>Fax machine generated cover sheets, confirmation notices and buffer printouts</i>	Until no longer of administrative value	Paper		<input type="checkbox"/>
HD24-123	Fax (Logs) <i>Register of fax messages sent and received by a fax machine</i>	Until no longer of administrative value	Paper		<input type="checkbox"/>



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HD24-124	Fax (Messages) <i>Communications sent and received using a fax machine</i>	Treat as correspondence (See HD24-125 and HD24-126)	Paper		<input type="checkbox"/>
HD24-125	Google Chat Conversation Records <i>Electronic conversations discussing business and functions, including, but not limited to, chat histories, conversations, conversation histories, attachments and file sharing</i>	Until no longer of administrative value	Electronic		<input type="checkbox"/>
HD24-126	Grant Applications (Not Funded) <i>Applications for grants that were not awarded for funding</i>	1 year	Paper/Electronic		<input type="checkbox"/>
HD24-127	Grant Records (Federal, State and Private) <i>Records documenting the application, awarding, administration, management, evaluation, monitoring and tracking of grants received by the Health Department</i>	5 years, provided all State, Federal and additional audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved	Paper/Electronic		<input type="checkbox"/>
HD24-128	Grant Records (Ohio Department of Health) <i>Records documenting the application, awarding, administration, management, evaluation, monitoring and tracking of grants received by the Health Department</i>	5 years, provided all State audits have been conducted, the audit reports released and all litigation, claims, or audit findings have been resolved	Paper/Electronic		<input type="checkbox"/>
HD24-129	Internal Planning Documents <i>Workpapers and documents gathered and compiled for program planning and/or development and for the creation and development of strategic priorities</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-130	Internet Logs <i>Logs that document an individual's use of the internet</i>	Until no longer of administrative value	Electronic		<input type="checkbox"/>
HD24-131	Inventory (Annual of Government Property) <i>Inventory of equipment maintained by the Health Department</i>	Until superseded	Paper/Electronic		<input type="checkbox"/>
HD24-132	Legal Advertisements/Notices <i>Legal announcements to inform the public of meetings, public hearings, bids, or other events requiring legal notification; including affidavits</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>



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HD24-133	Legal Opinions <i>Formal opinions requested by the Health Department from legal counsel to clarify laws and other rules that are applicable to the Health Department's functions</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-134	Mail (Unsolicited) <i>Unsolicited documents and items received via the mail that are unwanted/unneeded for government operational purposes</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-135	Management Reports or Feasibility Studies <i>Reports and studies created to assess functions, projects and programs</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-136	Manuals and Handbooks <i>Publications outlining policies, procedures, practices and general directives</i>	Until superseded, obsolete or replaced	Paper/Electronic		<input type="checkbox"/>
HD24-137	Marketing Materials <i>Informational publications distributed to the public and customers about programs and policies; including, but not limited to, advertisements, brochures, e-newsletters, newsletters and videos</i>	Until superseded or obsolete	Paper/Video/ Electronic		<input type="checkbox"/>
HD24-138	Photograph Files <i>Images documenting the operations, functions and events of a department</i>	Until superseded, obsolete or replaced	Electronic		<input type="checkbox"/>
HD24-139	Policy and Procedure Manuals and Plans <i>Rules and guidelines created to standardize and provide protocols for day-to-day operations</i>	Until superseded	Paper/Electronic		<input type="checkbox"/>
HD24-140	Press/News Releases <i>Announcements sent to the media to inform the public about actions, events and/or programs ; does not include marketing materials</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-141	Professional Association Records <i>Documents from associations related to an employee's job position to enhance learning, inform of events, or provide general information about the association</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-142	Publication Stock <i>Blank and/or unused office letterhead and business cards</i>	Until superseded or obsolete	Paper/Electronic		<input type="checkbox"/>



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HD24-143	Publications (Federal, State, Business) <i>Various publications issued and sent by businesses, federal and/or state governments</i>	Until superseded or until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-144	Reference Materials and Research Files <i>Collected information from a variety of resources to learn about events, legislative actions, programs, or concepts to explore changes or improvements to operations</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-145	Release Forms <i>Forms signed by participants in Health Department programs releasing the Health Department of liability, including permission to use images that include, but are not limited to, photographs, video and audio recordings</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-146	Returned Mail <i>Correspondence, notices and/or statements sent to individuals via mail and returned by the Post Office as undeliverable</i>	Until no longer of administrative value	Paper		<input type="checkbox"/>
HD24-147	Rosters/Directories/Organizational Charts <i>Charts and information documenting office personnel, contact information and office hierarchy</i>	Until superseded, obsolete or replaced	Paper/Electronic		<input type="checkbox"/>
HD24-148	Social Media Posts and Record <i>Information posted or received on an internet technology that facilitates and promotes interactive communication, participation, and collaboration, including, but not limited to Facebook, Instagram and Twitter, and the interactive tools and functions they provide to users, also includes metadata</i>	30 days, if post and/or comment is in violation of Health Department Social Media Policy then hide post. Public posts and/or comments made by the public may be removed, changed or edited upon the original poster's discretion.	Electronic		<input type="checkbox"/>
HD24-149	Social Media Account Records <i>Records related to, but not limited to, account ID user names, password information, authorized users, content editors, account information, site terms and use agreement</i>	Until no longer of administrative value	Electronic		<input type="checkbox"/>
HD24-150	Speeches and Presentations <i>Materials used or distributed when speaking to a group about a topic or subject</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>



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Union County General Health District  
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General Records  
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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-151	Statistical Reports <i>Documents compiled about a department's operations for fiscal, administrative, or managerial decision making or other information purposes</i>	Until superseded, obsolete, replaced or incorporated into annual report	Paper/Electronic		<input type="checkbox"/>
HD24-152	Surveys <i>Documents relating to an appraisal of a situation or area of study; including, but not limited to, completed surveys, survey forms and evaluation results</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-153	Text Messages <i>Messages sent or received on a cellular phone or computer relating to Health Department business</i>	Until no longer of administrative value	Electronic		<input type="checkbox"/>
HD24-154	Vehicle Maintenance Records <i>Records noting repairs, routine maintenance and service to Health Department owned vehicles</i>	Until vehicle sold	Paper/Electronic		<input type="checkbox"/>
HD24-155	Voicemails <i>Messages for recipients received on the telephone</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-156	YouTube Videos <i>Videos posted on YouTube disseminating topical information to the public</i>	Until updated, superseded or obsolete	Electronic		<input type="checkbox"/>
HD24-157	Webpage Data and Layouts <i>Website information, data, format and layout published on the Health Department website</i>	Until updated, superseded or obsolete	Electronic		<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

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Union County General Health District  
(Local Government Entity)

Administration Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-201	Accreditation Files <i>Records used and compiled in relation to achieving and maintaining certification through the Public Health Accreditation Board (PHAB), which seeks to improve the health of the public by advancing performance of public health departments</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-202	Annual Financial Report (State Subsidy Application) <i>Reports and documentation sent to the Ohio Department of Health related to subsidy funding</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-203	Annual Financial Report Working Papers (State Subsidy Application Working Papers) <i>Working papers and preparation documents used to create the annual financial report sent to the Ohio Department of Health related to subsidy funding</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-204	Annual Report <i>Annual report of the Health Department containing substantive information of operations, policies, procedures and planning</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
HD24-205	Board of Health Meeting Minutes <i>Official record of proceedings of the Board of Health</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
HD24-206	Board of Health Meeting Minutes (Drafts/Notes) <i>Preliminary working documents and personal convenience notes made in the compilation of the official minutes of a meeting</i>	Until official minutes are approved	Paper/Electronic		<input type="checkbox"/>
HD24-207	Board of Health Meeting Notices <i>Announcements to officials and public of upcoming business meetings</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-208	Board of Health Meeting Packets <i>Information submitted to Board of Health members prior to their meetings including, but not limited to, agenda, meeting minutes, director reports, finance reports and other documentation related to agenda items</i>	3 years	Electronic		<input type="checkbox"/>
HD24-209	Board of Health Resolutions <i>Formal action taken by the Board of Health authorizing a particular act, expression, authorization, transaction or appointment</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>





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Union County General Health District  
(Local Government Entity)

Administration Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-210	Child Fatality Review Board Meeting Minutes (ORC 3701.045) <i>Official record of proceedings of the Child Fatality Review Board; confidential ORC</i>	Permanent	Paper		<input type="checkbox"/>
HD24-211	Community Health Assessment (CHA) <i>Report on the status of health conditions and risk behavior in the county</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
HD24-212	Community Health Improvement Plan (CHIP) <i>Report on the strategies and objectives for the improving of health conditions and risk behaviors in the county</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
HD24-213	Community Health Assessment & Community Health Improvement Plan Work Papers <i>Working papers and preparation documents used to create the Community Health Assessment and Community Health Improvement Plan</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-214	Director Reports <i>Records created to compile statistics or document departmental activities or functions</i>	1 year	Electronic		<input type="checkbox"/>
HD24-215	District Advisory Council Meeting Minutes (ORC 3709.03) <i>Official record of the proceedings of the General Health District Advisory Council, which makes appointments to the Board of Health, reviews the annual report of the Board of Health and advises the Board of Health on matters of public health within the County</i>	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
HD24-216	HIPAA Complaint Records <i>Records related to formal complaints and investigations regarding the privacy or disclosure of a complainant's Personal Health Information (PHI); confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	6 years	Paper/Electronic		<input type="checkbox"/>
HD24-217	HIPAA Personal Health Information (PHI) Disclosure Log <i>Records documenting the release, transfer, provision of access to, or the divulging of personal health information as defined by the Health Insurance Portability and Accountability Act (HIPAA); confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	6 years	Paper/Electronic		<input type="checkbox"/>





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Union County General Health District  
(Local Government Entity)

Administration Division - Fiscal  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-301	Accounts Payable Records (Vendors) <i>Records and documents related to the payment and distribution of money for goods and/or services received, including, but not limited to, vendor purchase requisitions and purchase orders and expenditure reports used to document appropriations, encumbrances, expenses and/or remaining balances</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-302	Accounts Receivable Records (Customers) <i>Records and documents related to the billing and collection of money for services provided, including, but not limited to, customer invoices and receipts and revenue reports used to document collection, balancing and/or account reconciliation</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-303	Bids (Successful) <i>Records documenting the publicizing, hearing and awarding of quoted bids to vendors for services and/or merchandise, including requests for proposals, invitations to bid, requests for qualifications and statements of qualifications</i>	6 years after expiration of contract (ORC 2305.06)	Paper/Electronic		<input type="checkbox"/>
HD24-304	Bids (Unsuccessful) <i>Records documenting the publicizing and hearing of quoted bids to vendors for services and/or merchandise not selected, including requests for proposal, invitations to bid, requests for qualifications and statements of qualifications</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-305	Budget Preparation Documents <i>Working papers and preparation documents used to create annual budgets</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-306	Credit Card Authorization Forms <i>Authorization form submitted by a patron for the one-time use of a monetary charge to a credit card for services</i>	Until no longer of administrative value	Paper		<input type="checkbox"/>
HD24-307	Invoices (Paid) <i>Bills received from a vendor or seller to collect payment for goods and/or services</i>	Until digitized and quality control checked. If not digitized, maintain for 5 years	Paper		<input type="checkbox"/>
HD24-308	Invoices (Paid) <i>Bills received from a vendor or seller to collect payment for goods and/or services</i>	5 years, provided audit	Electronic		<input type="checkbox"/>





## RECORDS RETENTION SCHEDULE (RC-2)

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Union County General Health District  
(Local Government Entity)

Administration Division - Human Resources  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-401	Accident Records <i>Accident records related to the bodily injury of Health Department employees while performing job functions, non-employees on county property, and accidents involving a Health Department owned vehicle</i>	6 years, provided no action pending	Paper/Electronic		<input type="checkbox"/>
HD24-402	Continuing Education Records <i>Professional development licenses, certifications, trainings, and other documents related to advancement in education connected to job position</i>	Until no longer of administrative value	Paper/Electronic		<input type="checkbox"/>
HD24-403	Discipline Records <i>Records documenting investigations of personnel for violations of laws, rules, and/or policies that result in the issuance of an oral or written reprimand, suspension, demotion, involuntary leave of absence, removal from position, resignation in lieu of termination, last chance agreements and/or termination</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-404	Employment Applications (Not Hired) <i>Application submissions by individuals for job positions not chosen for employment; includes solicited and non-solicited applications, including, but not limited to, applicant letters, applicant tracking logs, background checks, pre-employment testing, driving abstracts, credit checks, references, resumes, and interview questions, notes and rating scales for prospective employees</i>	2 years (29 CFR § 1602.14) (29 CFR § 1627.3)	Paper/Electronic		<input type="checkbox"/>
HD24-405	Employee Assistance Program (EAP) Records <i>Records related to employees sent to participate in an employee assistance program (EAP), which seeks to address unacceptable job performance or conduct, including, but not limited to, formal referrals, updates, status reports, appointments, recommendations and completion records</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-406	Employment Eligibility Verification Form (I-9 Form) <i>Document verifying to an employer an employee's identity and used to establish that the employee is eligible to accept employment in the United States</i>	3 years after hire or 1 year after termination, whichever is later (8 CFR § 274a.2)	Paper/Electronic		<input type="checkbox"/>



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Administration Division - Human Resources  
(Unit)

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HD24-407	Employment Verifications <i>Requests inquiring about the employment status of current and former employees and prior service of former employees</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-408	Equal Employment Opportunity (EEO) Records <i>Records related to employee job categories, ethnicity, race, and gender collected anonymously for statistical purposes and federal compliance</i>	2 years (29 CFR § 1602.14) (29 CFR § 1627.3)	Paper/Electronic		<input type="checkbox"/>
HD24-409	Grievance Records <i>Formal complaints and responses regarding work, conduct, interpersonal relations, or disciplinary actions towards an employee or employer; includes unfounded complaints, investigation reports and pre-disciplinary conference records</i>	3 years after complaint settled (29 CFR § 1602.14) (29 CFR § 1627.3)	Paper/Electronic		<input type="checkbox"/>
HD24-410	Health Reimbursement Arrangement (HRA) <i>Reimbursements of employee medical claims and supporting documentation; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-411	Health Savings Account Records <i>Records documenting employer contributions to employee health savings accounts</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-412	Incident Reports <i>Records relating to unusual events that require departmental action or documentation including, but not limited to, theft and/or belligerent patrons</i>	6 years, provided no action pending	Paper/Electronic		<input type="checkbox"/>
HD24-413	Insurance Records (Employee) <i>Fiscal and administrative records generated in the administration of insurance policies</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-414	Intern Files (Paid) <i>Documentation of service throughout the duration of an individual's internship, including, but not limited to, intern description, payroll information, payroll changes, evaluations, payroll deductions, pension, personnel action forms, retirement, training, and W-4s</i>	10 years after termination. Retain service history, salary history, leave balances, retirement information, waivers and separation paperwork permanently	Paper/Electronic		<input type="checkbox"/>



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Union County General Health District  
(Local Government Entity)

Administration Division - Human Resources  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-415	Intern Files (Unpaid) <i>Documentation of service throughout the duration of an individual's internship; also includes Public Health Associate Program (PHAP) individual's service records</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-416	Job Descriptions <i>Documents detailing the classification, needed experience, education, physical requirements and duties by position title; including position analysis</i>	Until revised, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
HD24-417	Job Postings <i>Records documenting the posting and advertisement of employment positions, including, but not limited to, job descriptions, job requirements, application deadline, personnel requisition and compensation range</i>	2 years (29 CFR § 1602.14) (29 CFR § 1627.3)	Electronic		<input type="checkbox"/>
HD24-418	Medical Leave of Absences <i>Requests for extended medical leave or documentation of being medically restricted from working</i>	6 years after termination (29 CFR § 825.500) (29 USC § 1027)	Paper/Electronic		<input type="checkbox"/>
HD24-419	Payroll Records <i>Payroll records that contain time input worksheets, base and net salary, leave balances, and all withholdings</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-420	Performance Evaluations <i>Evaluations measuring the actual performance of an employee against their expected performance and identifying areas of development and growth</i>	5 years, maintain last 5 years permanently in employee's personnel file after separation	Paper/Electronic		<input type="checkbox"/>
HD24-421	Personnel Files <i>Documentation of service throughout the duration of an individual's employment, including, but not limited to, background checks, interview questions and notes, job description, payroll information, payroll changes, evaluations, payroll deductions, pension, performance improvement plans, retirement, training, layoff records, and W-4s</i>	10 years after termination. Retain service history, salary history, leave balances, retirement information, waivers and separation paperwork	Paper/Electronic		<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Administration Division - Human Resources  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-422	Personnel Files - Medical File <i>Medical related documentation of service throughout the duration of an individual's employment, including, but not limited to, drug tests, health insurance, health savings account, life insurance, medical insurance enrollment, short-term medical leave, physicals and polygraphs; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	6 years after termination (29 CFR § 825.500) (29 USC § 1027)	Paper/Electronic		<input type="checkbox"/>
HD24-423	Personnel Policy Manual <i>Rules and guidelines created to standardize and provide protocols for day-to-day operations in relation to personnel issues</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-424	Time Sheets <i>Records documenting employee time worked, hours worked and leave taken</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-425	Training Materials <i>Materials and resources compiled or created for human resource presentations and/or training exercises</i>	Until revised, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
HD24-426	Unemployment Compensation Records <i>Reports submitted to the Ohio Department of Job &amp; Family Services (ODJFS) documenting the number of weeks an employee worked and their wages; fiscal and administrative records generated in the administration of unemployment compensation for former employees; claims and litigation records involving unemployment compensation</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-427	Wage & Classification Compensation Plan <i>Periodic plan created to categorize, determine and evaluate the financial compensation of employees</i>	Until revised, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
HD24-428	Workers Compensation Records <i>Records documenting claims for wage replacement and medical benefits for work-related injuries filed with the Ohio Bureau of Workers Compensation; including notes related to the investigations</i>	10 years since last activity	Paper/Electronic		<input type="checkbox"/>
					<input type="checkbox"/>





## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Administration Division - Vital Statistics  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-501	Application for Vital Records <i>Requests for certified copies of birth or death certificates</i>	3 years, provided audit	Paper		<input type="checkbox"/>
HD24-502	Application for Vital Records (Veterans) <i>Requests from the Veterans' Services Commission to receive official copies of birth and/or death certificates</i>	3 years	Paper		<input type="checkbox"/>
HD24-503	Birth Certificates <i>Formal document that records a person's birthdate, birthplace and parentage</i>	Permanent	Electronic		<input checked="" type="checkbox"/>
HD24-504	Birth Certificates Correction Affidavits <i>Supplemental additions or corrections to a birth certificate</i>	Until digitized and quality control checked. If not digitized, maintain permanently	Paper		<input type="checkbox"/>
HD24-505	Birth Certificates Correction Affidavits <i>Supplemental additions or corrections to a birth certificate</i>	Permanent	Electronic		<input checked="" type="checkbox"/>
HD24-506	Burial Permits Report <i>Monthly report to the Ohio Division of Real Estate on the number of burial permits issued</i>	3 years	Electronic		<input type="checkbox"/>
HD24-507	Burial Transit Permits <i>Records permitting the transfer of a deceased person for internment, cremation, or disposition</i>	Until digitized and quality control checked. If not digitized, maintain for 3 years	Paper		<input type="checkbox"/>
HD24-508	Burial Transit Permits <i>Records permitting the transfer of a deceased person for internment, cremation, or disposition</i>	3 years	Electronic		<input type="checkbox"/>
HD24-509	Death Certificates <i>Formal document verifying that a person has died, with information such as the date and time of death, cause of death, and the signature of the attending or examining physician</i>	Until digitized and quality control checked. If not digitized, maintain permanently	Paper		<input type="checkbox"/>
HD24-510	Death Certificates <i>Formal document verifying that a person has died, with information such as the date and time of death, cause of death, and the signature of the attending or examining physician</i>	Permanent	Electronic		<input checked="" type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Administration Division - Vital Statistics  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-511	Death Certificates Correction Affidavits <i>Supplemental additions or corrections to a death certificate</i>	Until digitized and quality control checked. If not digitized, maintain permanently	Paper		<input type="checkbox"/>
HD24-512	Death Certificates Correction Affidavits <i>Supplemental additions or corrections to a death certificate</i>	Permanent	Electronic		<input checked="" type="checkbox"/>
HD24-513	Fetal Death Reports (Stillbirth Certificates) <i>Formal document verifying a stillbirth, with information such as the date and time of stillbirth, cause of death, and the signature of the attending or examining physician</i>	Permanent	Paper		<input checked="" type="checkbox"/>
HD24-514	Medical Supplemental Reports <i>Additional information filed with a death certificate by either the attending physician or coroner</i>	Permanent	Electronic		<input checked="" type="checkbox"/>
HD24-515	Quarterly Fee Report <i>Report to the Ohio Bureau of Vital Statistics documenting the number of births and deaths in the county</i>	3 years	Electronic		<input type="checkbox"/>
HD24-516	Security Paper Records <i>Receipt acknowledgments and audit number tracking logs for security paper used for the issuance of certified birth and death certificates</i>	1 year	Paper/Electronic		<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Environmental Health Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-601	Animal Bite Records <i>Records documenting persons bitten by animals that are reported to and investigated by the Health Department</i>	3 years	Paper/Electronic		<input type="checkbox"/>
HD24-602	Add-On or Remodel (AOR) Records <i>Reviews, including, but not limited to, house additions, accessory structures, pools and/or ponds in relation to location site well and septic systems</i>	5 years	Electronic		<input type="checkbox"/>
HD24-603	Complaint Log <i>Register of complaints received by the Health Department, in relation to, but not limited to, nuisance, food, sanitation and/or smoking complaints</i>	5 years	Electronic		<input type="checkbox"/>
HD24-604	Cost Methodology <i>Records annually analyzing services fees compared to services administrative costs</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-605	Daily Activity Log <i>Register documenting daily activities of the environmental health staff</i>	2 years	Electronic		<input type="checkbox"/>
HD24-606	Environmental Record Requests <i>Requests for site reviews for environmental assessments and surveys</i>	2 years	Paper/Electronic		<input type="checkbox"/>
HD24-607	Food Borne Outbreak Investigations <i>Records documenting the investigation of the outbreak of a foodborne illness; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-608	Food Service/Retail Food Establishment Operation Records <i>Documents, excluding food service/retail food establishment operation plans, including, but not limited to, inspection forms and license applications pertaining to a food service or retail food establishment</i>	5 years after operations cease	Paper/Electronic		<input type="checkbox"/>
HD24-609	Health District Licensing Committee Meeting Minutes <i>Record of proceedings of the Board of Health standing committee on licensing</i>	3 years	Paper/Electronic		<input checked="" type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Environmental Health Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-610	Inspection Forms <i>Records documenting inspections completed in all Environmental Health programs, including, but not limited to, camp/campground, food service/retail food establishment, institutions, manufactured home park, school, swimming pool/spa/special use pool, and/or tattoo and body piercing establishments</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-611	License Applications <i>Records documenting the application for a license for operation of, including, but not limited to, camp/campground, food service/retail food establishment, swimming pool/spa/special use pool, and/or tattoo and body piercing establishments</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-612	License Transmittals <i>Records documenting licenses issued and the portion of the fees remitted to the Ohio Department of Health</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-613	Nuisance Complaints <i>Record documenting the investigation of nuisance complaints received by the Health Department</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-614	Operation Plans - Camp/Campground <i>Plans that are reviewed and forwarded from the Ohio Department of Health to the Health Department for site inspection</i>	5 years after operations cease	Paper/Electronic		<input type="checkbox"/>
HD24-615	Operation Plans - Food Service/Retail Food Establishment <i>Blueprints submitted by food service vendors including, but not limited to, floor, lighting and plumbing plans along with equipment and surface schedules</i>	5 years after operations cease	Paper/Electronic		<input type="checkbox"/>
HD24-616	Operation Plans - Manufactured Home Park <i>Plans that are reviewed and forwarded from the Ohio Department of Health to the Health Department for site inspection</i>	5 years after operations cease	Paper/Electronic		<input type="checkbox"/>
HD24-617	Operation Plans - Swimming Pool <i>Plans that are reviewed and forwarded from the Ohio Department of Health to the Health Department for site inspection</i>	5 years after operations cease	Paper/Electronic		<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Environmental Health Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-618	Performance Bonds <i>Records documenting surety bonds filed for the issuance of a license for, including, but not limited to, plumbing, sewage system service providers and/or water haulers</i>	3 years, provided audit	Paper/Electronic		<input type="checkbox"/>
HD24-619	Permit Plans - Medical Gas <i>Blueprints and other documents received from owner/contractor(s) related to plan review for the supply and ventilation of medical related gas, including, but not limited to, anesthesia, fresh air, nitrogen, oxygen and vacuums</i>	Until digitized and quality control checked. If not digitized retain permanently	Paper		<input type="checkbox"/>
HD24-620	Permit Plans - Medical Gas <i>Blueprints and other documents received from owner/contractor(s) related to plan review for the supply and ventilation of medical related gas, including, but not limited to, anesthesia, fresh air, nitrogen, oxygen and vacuums</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-621	Permit Plans - Plumbing <i>Blueprints and other documents received from owner/contractor(s) related to plan review for plumbing applications and/or permits</i>	180 days after passed final inspection	Paper/Electronic		<input type="checkbox"/>
HD24-622	Permit Plans - Plumbing (Public Structures) <i>Blueprints and other documents received from owner/contractor(s) related to plan review for plumbing applications and/or permits related to publicly owned structures, including, but not limited to, government offices, hospitals and schools</i>	Until digitized and quality control checked. If not digitized retain permanently	Paper		<input type="checkbox"/>
HD24-623	Permit Plans - Plumbing (Public Structures) <i>Blueprints and other documents received from owner/contractor(s) related to plan review for plumbing applications and/or permits related to publicly owned structures, including, but not limited to, government offices, hospitals and schools</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-624	Plumbing Applications/Permits <i>Records documenting the application and approval of commercial and residential plumbing permits applied for and issued, and includes medical gas applications and permits</i>	Permanent	Electronic		<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Environmental Health Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-625	Program Surveys <i>Records documenting program surveys - camp/campground, food service/retail food establishment, manufactured home park, school and/or swimming pool/spa/special use pool - performed by governing agencies including, but not limited to, the Ohio Department of Health (ODH) and Ohio Department of Agriculture (ODA)</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-626	Real Estate Inspections <i>Records documenting inspections of sewage and water systems, upon request, before a real estate transfer occurs</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-627	Sewage Applications/Permits <i>Records documenting the application and approval of sewage permits applied for and issued</i>	Until digitized and quality control checked. If not digitized retain permanently	Paper		<input type="checkbox"/>
HD24-628	Sewage Applications/Permits <i>Records documenting the application and approval of sewage permits applied for and issued</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-629	Sewage Operation Maintenance Permits <i>Records documenting the annual application and permitting of sewage operations and maintenance</i>	Until digitized and quality control checked. If not digitized retain 10 years	Paper		<input type="checkbox"/>
HD24-630	Sewage Operation Maintenance Permits <i>Records documenting the annual application and permitting of sewage operations and maintenance</i>	10 years	Electronic		<input type="checkbox"/>
HD24-631	Sewage Registrations <i>Records documenting the annual list of registered sewage installers and sewage service providers</i>	5 years	Electronic		<input type="checkbox"/>
HD24-632	Site Evaluations (No Permit Issued) <i>Records documenting preliminary inspection of potential building sites for the evaluation of septic and water system placement</i>	Until digitized and quality control checked. If not digitized retain 5 years	Paper		<input type="checkbox"/>
HD24-633	Site Evaluations (No Permit Issued) <i>Records documenting preliminary inspection of potential building sites for the evaluation of septic and water system placement</i>	5 years	Electronic		<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Environmental Health Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-634	Smoke Free Workplace Records <i>Records documenting complaints, investigations and reports of violations of smoke free workplaces</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-635	Solid Waste Site Hazardous Waste Records <i>Records documenting the approval to open or close a solid/hazardous waste disposal facility, including, but not limited to, initial plan approval, closure documents inspection reports, and post closure documents</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-636	Subdivision Plan Review Records (Lot Review Required) <i>Blueprints and other documentation, including, but not limited to, correspondence received from owner/contractor(s) related to plan reviews for subdivisions</i>	Until digitized and quality control checked. If not digitized retain permanently	Paper		<input type="checkbox"/>
HD24-637	Subdivision Plan Review Records (Lot Review Required) <i>Blueprints and other documentation, including, but not limited to, correspondence received from owner/contractor(s) related to plan reviews for subdivisions</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-638	Subdivision Plan Review Records (Lot Review Not Required) <i>Blueprints and correspondence received from owner/contractor(s) and the Logan-Union-Champaign (LUC) Regional Planning Commission related to plan reviews for subdivisions</i>	1 year	Paper/Electronic		<input type="checkbox"/>
HD24-639	Variance Requests <i>Records documenting the request for a change to rules and/or regulations enforced by the Health Department</i>	Until digitized and quality control checked. If not digitized retain permanently	Paper		<input type="checkbox"/>
HD24-640	Variance Requests <i>Records documenting the request for a change to rules and/or regulations enforced by the Health Department</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-641	Vector Borne Disease Records <i>Records documenting, including, but not limited to, records of sprays, trap site locations, testing, safety checklists, and disease surveillance for diseases that are transmitted through blood-feeding arthropods</i>	5 years, provided audit	Paper/Electronic		<input type="checkbox"/>







## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Health Promotion & Planning Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-701	Car Seat Safety Records <i>Records pertaining to car seat safety administered by the Health Department including the car seat distribution program and car seat installation program</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-702	Communicable Disease Records <i>Records documenting reportable infectious diseases or illnesses transmitted from person to person, including lab reports and epidemiological investigations; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Until entered into database and quality control checked	Paper		<input type="checkbox"/>
HD24-703	Communicable Disease Records <i>Records documenting reportable infectious diseases or illnesses transmitted from person to person, including lab reports and epidemiological investigations; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-704	Epidemiological Case Records <i>Records documenting protected health information as it relates to communicable disease investigations; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	5 years, unless related to an outbreak then retain 10 years	Paper/Electronic		<input type="checkbox"/>
HD24-705	Health Education Program/Community Program Records <i>Records related to educational programs sponsored by the Health Department, including, but not limited to, Child Passenger Safety, Safe and Sound, and Wellness Consortium and contains, but not limited to, administrative records, correspondence, evaluations, promotional materials and surveys</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-706	Help Me Grow Program Client Records <i>Client files documenting early intervention services for children with developmental delays from birth to 3 years of age; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	7 years past last date of service	Paper/Electronic		<input type="checkbox"/>
HD24-707	Help Me Grow Program Grant Records <i>Records related to the administrative and fiscal operations of the Help Me Grow Program, which seeks to provide intervention services for children with developmental delays from birth to 3 years of age</i>	7 years, provided audit	Paper/Electronic		<input type="checkbox"/>





## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Health Promotion & Planning Division - Emergency Preparedness  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-801	Emergency Preparedness (EP) Equipment Inventories <i>Lists documenting equipment purchased and in storage for response to an emergency incident</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-802	Emergency Preparedness (EP) Equipment Transfers <i>Records of emergency preparedness equipment transferred to other political subdivisions or agencies</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-803	Emergency Preparedness (EP) Training Signature Sheets <i>Signature sheets for attendees attending emergency preparedness exercises and training programs</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-804	Emergency Response Agreements <i>Letters of Agreement (LOA), Memorandums of Understanding (MOU) and/or Memorandums of Agreement (MOA) for providing emergency response services during an incident</i>	Until superseded, obsolete or replaced	Paper/Electronic		<input type="checkbox"/>
HD24-805	Emergency Response Plans <i>Plans for responding to an emergency incident, including, but not limited to, communication plans and infectious disease plans</i>	Until superseded, obsolete or replaced	Paper/Electronic		<input type="checkbox"/>
HD24-806	Exercise Records <i>Records documenting a simulated emergency response, including, but not limited to, After Action Reports (AAR), Improvement Plans (IP) and National Incident Management System (NIMS) records</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-807	Meeting Notes <i>Notes, agendas and meeting materials taken during, but not limited to, Emergency Preparedness (EP), Health Care Coalition (HCC) and/or Medical Reserve Corps (MRC) meetings</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-808	Real World Emergency Response Records <i>Records documenting an actual emergency response, including, but not limited to, After Action Reports (AAR) and Improvement Plans (IP)</i>	10 years	Paper/Electronic		<input checked="" type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Nursing Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-901	Ahlers Client Visit Records (CVR) <i>Records documenting clinical services provided to individuals showing demographics, visit type, medical services provided, payment source, insurance status, education/counseling services provided and necessary referrals; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Until digitized and quality control checked. If not digitized, maintain for 1 year	Paper		<input type="checkbox"/>
HD24-902	Ahlers Client Visit Records (CVR) <i>Records documenting clinical services provided to individuals showing demographics, visit type, medical services provided, payment source, insurance status, education/counseling services provided and necessary referrals; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-903	Children with Medical Handicaps (CMH) Records <i>Records documenting family assistance for families with children under twenty-one years of age who have medical handicap(s); confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Until digitized and quality control checked. If not digitized, maintain for 5 years after last contact	Paper		<input type="checkbox"/>
HD24-904	Children with Medical Handicaps (CMH) Records <i>Records documenting family assistance for families with children under twenty-one years of age who have medical handicap(s); confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-905	Child Fatality Review Board Reviews (CFR) <i>Records and supporting documentation reviewing the deaths of minors under age eighteen that are county residents, including, but not limited to agenda, sign-in sheets and meeting notes; confidential ORC 149.43(A)(1)(s)</i>	5 years	Paper/Electronic		<input type="checkbox"/>
HD24-906	Clinic Certifications & Licenses <i>Records documenting the formal approval of Nursing Division functions and actions, including, but not limited to, Clinical Laboratory Improvement Amendments (CLIA) and Terminal Distributor of Dangerous Drugs (TDDD)</i>	Until updated, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Nursing Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-907	Clinic Equipment Calibration & Service Logs <i>Records documenting the checking of instruments readings and the maintenance and services of clinical equipment</i>	Until digitized and quality control checked	Paper		<input type="checkbox"/>
HD24-908	Clinic Equipment Calibration & Service Logs <i>Records documenting the checking of instruments readings and the maintenance and services of clinical equipment</i>	2 years	Electronic		<input type="checkbox"/>
HD24-909	Cribs for Kids Records <i>Records related to the distribution of portable infant cribs to low income families</i>	1 year	Paper/Electronic		<input type="checkbox"/>
HD24-910	Drug Inventory <i>Records documenting the inventory and administration of biopharmaceuticals</i>	3 years (OAC 4729:5-19-04)	Paper/Electronic		<input type="checkbox"/>
HD24-911	Early Head Start Program Records <i>Records related to the providing of home visits for educational services for children from low-income families from birth to 3 years of age, and pregnant women and their families; confidential 42 USC § 9836a</i>	7 years past last date of service	Paper		<input type="checkbox"/>
HD24-912	Immunization Consents <i>Records documenting medical consents by individuals to receive vaccines; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Until digitized and quality control checked in EMR system. If not digitized, maintain for 2 years	Paper		<input type="checkbox"/>
HD24-913	Immunization Consents <i>Records documenting medical consents by individuals to receive vaccines; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	2 years	Electronic		<input type="checkbox"/>
HD24-914	Patient Medical Records (EMR) <i>Client visitation records, health screenings, immunization records, general consents, laboratory reports, patient income attestations, notices of privacy practices, and other documentation of individuals who have received clinical services; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Until digitized and quality control checked. If not digitized, maintain for 5 years after last contact	Paper		<input type="checkbox"/>



## RECORDS RETENTION SCHEDULE (RC-2)

*See instructions before completing this form.*

Union County General Health District  
(Local Government Entity)

Nursing Division  
(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required
HD24-915	Patient Medical Records (EMR) <i>Client visitation records, health screenings, immunization records, general consents, laboratory reports, patient income attestations, notices of privacy practices, and other documentation of individuals who have received clinical services; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Permanent	Electronic		<input type="checkbox"/>
HD24-916	School Health Records <i>Records documenting health screenings provided to school students including, but not limited to, dental, hearing, scoliosis, and vision screenings; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	Until digitized and quality control checked. If not digitized, maintain for 5 years after last contact	Paper		<input type="checkbox"/>
HD24-917	School Health Records <i>Records documenting health screenings provided to school students including, but not limited to, dental, hearing, scoliosis, and vision screenings; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	5 years after last contact	Electronic		<input type="checkbox"/>
HD24-918	Vaccine Storage & Temperature Logs <i>Records documenting the storage of vaccines at the Health Department along with the tracking of storage temperatures of the vaccines</i>	Until digitized and quality control checked	Paper		<input type="checkbox"/>
HD24-919	Vaccine Storage & Temperature Logs <i>Records documenting the storage of vaccines at the Health Department along with the tracking of storage temperatures of the vaccines</i>	3 years (OAC 4729:5-19-04)	Electronic		<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>