



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

OHIO HISTORY CONNECTION

OCTOBER 23 2024

STATE AND LOCAL  
 GOVERNMENT RECORDS

## 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 Human Resources**

**(All Departments, Offices and Agencies)**

(Local Government Entity)

(Unit)

*Ginger Yonak*  
 (Signature of Responsible Official)

**Ginger Yonak**  
 (Name)

**Director**  
 (Title)

*10/15/24*  
 (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.

*[Signature]*  
 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)

*See instructions before completing this form.*

Union County Human Resources  
(Local Government Entity)

All Departments, Offices and Agencies  
(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
HR24-101	Accident Records <i>Accident records related to the bodily injury of county employees while performing job functions, non-employees on county property, and accidents involving a county owned vehicle</i>	Until digitized and quality control checked. If not digitized, maintain for 6 years, provided no action pending	Paper		<input type="checkbox"/>
HR24-102	Accident Records <i>Accident records related to the bodily injury of county employees while performing job functions, non-employees on county property, and accidents involving a county owned vehicle</i>	6 years, provided no action pending	Electronic		<input type="checkbox"/>
HR24-103	Benefits Records <i>Records related to the enrollment of county employees for health, dental, vision, prescription drug and life insurance plans; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	6 years (29 USC § 1027)	Paper/Electronic		<input type="checkbox"/>
HR24-104	Collective Bargaining Agreement Contracts <i>Legal agreements with bargaining units outlining employer and employee relations, expectations, and job responsibilities</i>	8 years after expiration (ORC 2305.06)	Paper/Electronic		<input type="checkbox"/>
HR24-105	Collective Bargaining Agreement Negotiation Files <i>Administrative records used and compiled in relation to contract negotiations with labor unions</i>	Until digitized and quality control checked. If not digitized, maintain for 7 years after contract expires	Paper		<input type="checkbox"/>
HR24-106	Collective Bargaining Agreement Negotiation Files <i>Administrative records used and compiled in relation to contract negotiations with labor unions</i>	7 years after contract expires	Electronic		<input type="checkbox"/>
HR24-107	Continuing Education Records <i>Professional development licenses, certifications, trainings, and other documents related to advancement in education connected to job position</i>	Place in personnel file	Paper		<input type="checkbox"/>
<b>THIS GENERAL HUMAN RESOURCES SCHEDULE DOES NOT MODIFY OR SUPERSEDE ANY SPECIFIC OFFICE, AGENCY, OR DEPARTMENTAL SCHEDULE APPROVED BY THE COUNTY RECORDS COMMISSION</b>					



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Union County Human Resources  
(Local Government Entity)

All Departments, Offices and Agencies  
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HR24-108	CORSA Records <i>Records documenting the administration of the County Risk Sharing Authority (CORSA) insurance coverage, including, but not limited to, building and content appraisals, claims, coverage certificates, incident reports, renewals and vehicle reports</i>	2 years, provided all claims settled	Paper/Electronic		<input type="checkbox"/>
HR24-109	Desk Audits <i>Records documenting the evaluation and revision of an employee position in relation to the Classification Compensation Plan</i>	Until digitized and quality control checked. If not digitized, maintain for 2 years	Paper		<input type="checkbox"/>
HR24-110	Desk Audits <i>Records documenting the evaluation and revision of an employee position in relation to the Classification Compensation Plan</i>	2 years (29 CFR § 1602.14) (29 CFR § 1627.3)	Electronic		<input type="checkbox"/>
HR24-111	Drug Test Records <i>Records related to the administration of random drug tests, including, but not limited to, drug test lists, negative drug test results, alcohol test results less than 0.02, alcohol and drug collection process, follow-up tests and follow-up schedules, refusals to test, alcohol test results 0.02 or greater, verified positive drug test results</i>	5 years (49 CFR § 382.401)	Paper/Electronic		<input type="checkbox"/>
HR24-112	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>	Until digitized and quality control checked. If not digitized, maintain for 2 years	Paper		<input type="checkbox"/>
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(Unit)

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HR24-113	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)	Electronic		<input type="checkbox"/>
HR24-114	Employment Eligibility Verification Form (I-9 Form) (PP 4.07) <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 (PP 4.17) (8 CFR § 274a.2)	Paper/Electronic		<input type="checkbox"/>
HR24-115	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"/>
HR24-116	Family Medical Leave Act (FMLA) Records <i>Documentation related to the employees utilizing leave under the Family Medical Leave Act; confidential 45 CFR § 160 &amp; ORC 149.43(A)(1)(a)</i>	3 years after termination (29 CFR § 825.500)	Paper/Electronic		<input type="checkbox"/>
HR24-117	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>	Until digitized and quality control checked. If not digitized, maintain for 3 years after complaint settled	Paper		<input type="checkbox"/>
HR24-118	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)	Electronic		<input type="checkbox"/>

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Union County Human Resources  
(Local Government Entity)

All Departments, Offices and Agencies  
(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
HR24-119	Intern Files (PP 5.13) <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"/>
HR24-120	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"/>
HR24-121	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>	Until digitized and quality control checked. If not digitized, maintain for 2 years	Paper		<input type="checkbox"/>
HR24-122	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"/>
HR24-123	Layoff Records <i>Records documenting the ranking of employees to determine potential layoffs and displacement rights into other positions, including employee retention points records</i>	Until digitized and quality control checked. If not digitized, maintain for 7 years	Paper		<input type="checkbox"/>
HR24-124	Layoff Records <i>Records documenting the ranking of employees to determine potential layoffs and displacement rights into other positions, including employee retention points records</i>	7 years (29 CFR § 1602.14) (29 CFR § 1627.3) (ORC 2305.07) (ORC 2305.09)	Electronic		<input type="checkbox"/>
HR24-125	Performance Evaluations <i>Annual evaluation 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"/>

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All Departments, Offices and Agencies  
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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
HR24-126	Personnel Files (PP 5.13) <i>Documentation of service throughout the duration of an individual's employment, including, but not limited to, job 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"/>
HR24-127	Personnel Files - Discipline Records (PP 8.02) <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>	7 years (PP 8.02)	Paper/Electronic		<input type="checkbox"/>
HR24-128	Personnel Files - Medical (PP 6.12) <i>Medical related documentation of service throughout the duration of an individual's employment, including, but not limited to, drug tests, health insurance, life insurance, 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"/>
HR24-129	Workers Compensation Investigative Notes <i>Notes relating to the investigation of a workers compensation claim</i>	Until digitized and quality control checked. If not digitized, contain permanently	Paper		<input type="checkbox"/>
HR24-130	Workers Compensation Investigative Notes <i>Notes relating to the investigation of a workers compensation claim</i>	Permanent	Electronic		<input type="checkbox"/>
HR24-131	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</i>	Until digitized and quality control checked and uploaded into Ohio Bureau of Workers Compensation System	Paper		<input type="checkbox"/>
					<input type="checkbox"/>

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Union County Human Resources  
(Local Government Entity)

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
HR24-201	Benefits Committee Records <i>Records related to the administrative operations of the Union County Benefits Committee, including, but not limited to, agendas, correspondence, meeting minutes, newsletters and rate charts</i>	3 years	Paper/Electronic		<input type="checkbox"/>
HR24-202	Classification Compensation Plan <i>Periodic plan created to categorize, determine and evaluate the financial compensation of employees</i>	Until revised, superseded or obsolete. Maintain one copy of previously enacted plan until current plan is revised, superseded or obsolete	Paper/Electronic		<input type="checkbox"/>
HR24-203	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>	Until digitized and quality control checked. If not digitized, maintain for 7 years (PP 8.02)	Paper		<input type="checkbox"/>
HR24-204	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>	7 years (PP 8.02)	Electronic		<input type="checkbox"/>
HR24-205	Personnel Policy Manual <i>Manual documenting employment policies, procedures and guidelines</i>	Until revised, superseded or obsolete. Maintain one copy of previously enacted policies permanently	Paper/Electronic		<input type="checkbox"/>
HR24-206	Training Materials <i>Materials and resources compiled or created for human resource presentations and/or training exercises</i>	Until information is superseded, obsolete, or replaced	Paper/Electronic		<input type="checkbox"/>
HR24-207	Wellness Committee Records <i>Records related to the administrative operations of the Union County Wellness Committee, including, but not limited to, agendas, correspondence, meeting minutes and newsletters</i>	3 years	Paper/Electronic		<input type="checkbox"/>



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HR24-208	Wellness Program Records <i>Fiscal and administrative records of the County Wellness program, which is a comprehensive health program designed to maintain a high level of employee well being; including activity details and employee participation records</i>	Until digitized and quality control checked. If not digitized, maintain for 3 years, provided audit	Paper		<input type="checkbox"/>
HR24-209	Wellness Program Records <i>Fiscal and administrative records of the County Wellness program, which is a comprehensive health program designed to maintain a high level of employee well being; including activity details and employee participation records</i>	3 years, provided audit	Electronic	Audited means: the years encompassed by the records have been audited by the Auditor of State and the audit report has been released pursuant to Sec. 117.26 O.R.C.	<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>
					<input type="checkbox"/>