



**Ohio Historical Society
State Archives of Ohio
Local Government Records Program**

1982 Velma Avenue
Columbus, Ohio 43211-2497

For State Archives - LGRP Use Only

Date Received:

Date Reviewed:

Items requested for transfer: YES NO

If YES, attach copy of transfer form

RECORDS RETENTION SCHEDULE (RC-2) – Part 1

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

Section A: Local Government Unit

MADISON-PLAINS LOCAL SCHOOL DISTRICT

PUBLIC SCHOOL

(local government entity)

Tim Dettwiler

Tim Dettwiler

(unit)

Treasurer/CFO

03/21/2011

(signature of responsible official)

(name)

(title)

(date)

Section B: Records Commission

MADISON-PLAINS SCHOOLS Records Commission

740-852-0290

(telephone number)

55 LINSON ROAD LONDON

(address)

(city)

43140

(zip code)

MADISON

(county)

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

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

Timothy R. Dettwiler

3/21/11

Records Commission Chair Signature

Date

Section C: Ohio Historical Society - State Archives

Elizabeth Lombardo Gov't Records Archivist - LGRP

Signature

Title

4/27/11

Date

Section D: Auditor of State

Martin E. Mueh

Signature

5-12-11

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 "E"

Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
1000	BOARD AND ADMINISTRATIVE RECORDS				
1101	Minutes	Treasurer	Permanent	Hard Copy	
1101.1	Audio Tapes	Treasurer	2 Years		
1102	Blue Prints, Plans, Maps	Superintendent	Permanent	Hard Copy	
1103	Deeds, Easements, Leases	Treasurer	Permanent	Hard Copy	
1104	Board Policy Books and Other Adopted Policies	Superintendent & Secretary	1 Year after Superseded	Hard Copy	
1105	Administrative Regulations	Superintendent & Secretary	1 Year after Superseded	Hard Copy	
1106	Court Decisions	Treasurer	Permanent	Hard Copy	
1107	Claims and Litigation	Treasurer	Permanent	Hard Copy	
1201	Elections	Supt/Treasurer	10 Years	Hard Copy	
1202	Record Disposal Forms (RC-3)	Treasurer	10 Years	Hard Copy	
1203	Bargaining Agreements	Superintendent	10 Years after Expiration	Hard Copy	
1204	Budget Policy Files	Treasurer	5 Years	Hard Copy	
1301	Worker's Compensation Claims	Treasurer	10 Years after Financial Payment Made	Hard Copy	
1302	Bank Depository Agreements	Treasurer	4 Years after Completion	Hard Copy	
1303	Organization Reports	Treasurer	2 Years**	Hard Copy	
1304	Board Meeting Notes	Treasurer	1 Year	Hard Copy	
1305	Agendas	Treasurer	1 Calendar Year**	Hard Copy	
1401	Adopted Courses of Study	Curriculum Director	Until Superseded	Hard Copy	
1402	Adopted Special Education Programs	Curriculum Director	Until Superseded	Hard Copy	
1403	Adopted Special Programs	Curriculum Director	Until Superseded	Hard Copy	

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.

*After End of Fiscal Year

**Provided Audited

*** Hard copy maintained for 3 years after audited-then microfilmed

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2/17/2011

RECORDS RETENTION SCHEDULE "E"

Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
2000	EMPLOYEE RECORDS (Employee files include employment applications, resumes, contracts/salary notices, evaluations, personnel actions, absence certification, transcripts, and any other documents which become part of the file.)			Hard Copy	
2101	Certified Active Employees	Treasurer	Permanent	Hard Copy	
2102	Classified Active Employees	Treasurer	Permanent	Hard Copy	
2103	Certificated Inactive Employees	Treasurer	Permanent***	Hard Copy	
2104	Classified Inactive Employees	Treasurer	Permanent***	Hard Copy	
2105	Civil Rights, Civil Service and Disciplinary Reports	Superintendent Secretary	Permanent***	Hard Copy	
2107	Retirement Letters	Superintendent Secretary	Permanent***	Hard Copy	
2108	Substitute Records	Treasurer	25 Years	Hard Copy	
2301	Employee Contracts	Treasurer	4 Years after termination from employment.	Hard Copy	
2302	Professional Conference Applications	Curriculum Director	2 Years**	Hard Copy	
2303	Irregular Employee Contracts(Substitutes, etc.)	Treasurer	4 Years after contract expires	Hard Copy	
2304	Unemployment Claims	Treasurer	5 Years	Hard Copy	
2305	Unemployment	Treasurer	5 Years	Hard Copy	
2306	Applications (not hired)	Superintendent Secretary	2 Years**	Hard Copy	
2307	Schedules of Employees	Superintendent Secretary	Fiscal Year plus 2 Years	Hard Copy	
2308	Student Helper Applications	Building Secretary	2 Years	Hard Copy	
2309	Teacher Personnel Reports (internal)	Superintendent Secretary	Fiscal Year plus 1 year	Hard Copy	
2310	I-9 Immigration Verification Forms	Superintendent Secretary	Termination of Employment plus 1 year	Hard Copy	
2401	Job Description	Superintendent Secretary	Termination of Employment plus 1 year	Hard Copy	

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Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
3000	STUDENT RECORDS				
3101	Student Record Folders, Enrollment/Withdrawal Information, Grades/Transcripts, Activities Records, Attendance Records, Individual Test Results, Standardized, Competency/Proficiency, Aptitude, Intervention Records, Foreign Exchange Records, Suspension/Expulsions, Home Schooled Student Records	Building Secretary	Permanent****	Digital	
3102	Office Record Card (K-9)	Building Secretary	Permanent****	Digital	
3201	Health/Medical Records, Visual Screenings, Hearing Screenings, Immunization Records	Building Nurse	7 Years after Graduation	Digital	
3202	Discipline Records, Letters to Parents, Office Discipline	Principal Secretary	1 Year after Student leaves school	Hard Copy	
3203	Psychological Records (Restricted)	Director of Special Education & Secretary	Permanent****	Hard Copy	
3204	Child Abuse/Neglect Referral Letters	Building Secretary	Through Graduation	Hard Copy	
3301	Teacher Grade Books/Records	Building Secretary	3 Years**	Hard Copy	
3302	Pre-School Screening Profiles	Director of Special Education & Secretary	3 Years	Hard Copy	
3303	Age and Schooling Records (Work Permits)	Building Secretary	3 Years	Hard Copy	
3304	Student Accident Reports	Building Nurse	5 Years provided no action pending	Hard Copy	
3305	Individual Educational Plan (IEP)	Director of Special Education & Secretary	Permanent****	Hard Copy	
3306	Free and Reduced Lunch Applications	District Food Service Manager	4 Years	Hard Copy	
3401	Emergency Information	Building Secretary	Until Superseded	Hard Copy	

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Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
4000	BUILDING RECORDS				
4202	Tornado and Fire Drill Records	Building Secretary	1 Year*	Hard Copy	
4203	Building Health Inspections	Building Secretary	2 Years*	Hard Copy	
4301	Student Activity Records	Building Secretary	2 Years**	Hard Copy	
	Pay-In Forms				
	Pay-Out Forms				
	Account Forms/Dist.				
	Budget Forms				
	Requisitions				
	Purchase Orders				
	Ticked Sale Report				
4302	Receipts/Deposit Slips	Building Secretary	4 Years**	Hard Copy	
4303	Budget/Appropriation Records	Building Secretary	4 Years**	Hard Copy	
4304	Requisitions/Purchase Orders	Building Secretary	10 Years**	Hard Copy	
4401	Textbook Inventories	Building Secretary	Until Superseded	Hard Copy	
4402	Supplies Inventory	Building Secretary	Until Superseded	Hard Copy	
4403	Student Handbooks	Building Secretary	Until Superseded	Hard Copy	

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5000	<u>CENTRAL DEPARTMENTAL RECORDS</u>				
	<u>Administrative Offices</u>				
5201	School Calendars	Supt. Secretary	5 Years	Hard Copy	
5301	Repair, Installation and Maintenance Records	Treasurer	4 Years**	Hard Copy	
5302	Prevailing Wage Records	Treasurer	4 Years**	Hard Copy	
5303	Rental Information (Use of Facilities)	Treasurer	4 Years**	Hard Copy	
5304	Work Orders	Maintenance Supervisor/ Tech Director	4 Years**	Hard Copy	
5305	Environmental Reports and Data (asbestos, etc.)	Superintendent Secretary	4 Years**	Hard Copy	
5306	Vandalism Reports	Treasurer	4 Years**	Hard Copy	
5307	Student Activity Purpose Clauses	Treasurer	4 Years**	Hard Copy	
5308	Sales Potential Forms (Student Activities)	Treasurer	4 Years**	Hard Copy	
5309	Bids and Specifications (Unsuccessful)	Treasurer	1 Year**	Hard Copy	
5310	Bids and Specifications (Successful)	Treasurer	4 Years after completion of project**	Hard Copy	
5311	Contractor Files (Resolutions, additions, drawings, etc)	Treasurer	Until project complete if no action pending**	Hard Copy	
5401	Preventive Maintenance Reports	Superintendent Secretary	Fiscal Year plus 2 Years	Hard Copy	
5402	Warranty/Guarantee	Treasurer	Life/Warranty of Equipment	Hard Copy	
5403	Plant and Equipment Inventory	Treasurer	Until Superseded**	Hard Copy	
5404	Textbook/Workbook Inventory	Curriculum Director	Until Superseded**	Hard Copy	
5405	Supplies Inventory	Treasurer	Until Superseded**	Hard Copy	

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Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS, LGRP
	Special Education Department				
5221	Special Education Tutoring Reports	Director of Special Education & Secretary	10 Years	Hard Copy	
5222	Individual Educational Records (IEP)	Director of Special Education & Secretary	7 Years	Digital	
5223	Psychological Records (Restricted)	Director of Special Education & Secretary	Permanent***	Digital	

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RECORDS RETENTION SCHEDULE "E"

Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
	<u>Transportation Department</u>				
5340	Driver Physical	Transportation Supervisor	2 Years after termination	Hard Copy	
5341	Fuel Consumption Data	Transportation Supervisor	4 Years**	Hard Copy	
5342	Transportation Records	Transportation Supervisor	4 Years**	Hard Copy	
5343	Field Trip Forms and Volunteer Driver Forms	Transportation Supervisor	Fiscal Year plus 2 Years	Hard Copy	
5441	Accident Reports	Transportation Supervisor	3 Years provided no action pending	Hard Copy	
5442	Vehicle Registration	Transportation Supervisor	Life of Vehicle	Hard Copy	
5443	Vehicle License	Transportation Supervisor	1 Year after termination	Hard Copy	
5445	Driver Certifications	Transportation Supervisor	1 Year after termination	Hard Copy	
5446	Supplies Inventory	Transportation Supervisor	Until Superseded**	Hard Copy	
5447	Vehicle Defect Report	Transportation Supervisor	Life of Vehicle	Hard Copy	

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Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
	Food Services Department				
5561	Food Service Records	Food Service Manager	4 Years**	Hard Copy	
	Menus				
	Food Production				
	Milk Sold				
	Students Served				
5562	Lunchroom Records	Food Service Manager	4 Years**	Hard Copy	
	Cash Register Tapes				
	Cashier's Daily Reports				
5563	Lunchroom Reports (Free and Reduced)	Food Service Manager	4 Years**	Hard Copy	
5564	Inventories	Food Service Manager	Until Superseded**	Hard Copy	
5565	Lunchroom License	Food Service Manager	1 Year after expiration	Hard Copy	

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RECORDS RETENTION SCHEDULE "E"

Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
6000	FINANCIAL RECORDS				
6101	Annual Financial Reports Appropriation Ledgers Budget Ledgers Revenue Journals Vendor Listing Check Register Purchase Order Listing Invoice List Account Reports Financial Summary Detail Reports	Treasurer	5 Years**	Hard Copy/ Digital	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.
6102	Activity Fund Cash Journal and Ledger	Treasurer	5 Years**	Hard Copy	
6103	Bond Register	Treasurer	20 Years after issue expires	Hard Copy	
6104	Securities	Treasurer	Permanent***	Hard Copy	
6201	Investment Ledger	Treasurer	5 Years**	Hard Copy	
6202	Foundation Distribution	Treasurer	5 Years**	Hard Copy	
6203	Tax Settlements (Semi-Annual) and Advances	Treasurer	5 Years**	Hard Copy	
6204	Budgets (Annual)	Treasurer	5 Years**	Hard Copy	
6205	Insurance Policies	Treasurer	15 Years after expiration provided all claims settled	Hard Copy	
6206	Contracts	Treasurer	15 Years after expiration	Hard Copy	
6207	Bonds and Coupons	Treasurer	Until Redeemed**	Hard Copy	
6208	Accounts Payable Ledgers	Treasurer	5 Years**	Hard Copy	
6209	Accounts Receivable Ledgers	Treasurer	5 Years**	Hard Copy	
6210	Budget Work Papers	Treasurer	5 Years**	Hard Copy	
6211	Vouchers, Invoices and Purchase Orders	Treasurer	10 Years**	Hard Copy	
6212	State Program Files Aux. Services DPPF Adult Vocational Excess Lottery Data Processing Public/Private Grants, etc.	Treasurer	10 Years**	Hard Copy	
6213	Federal Program Files Title I, II, III, IV-B, IV-C & VI-B Chapter 1, 2; Drug Free, etc.	Treasurer	10 Years**	Hard Copy	
6214	Travel Expense Voucher	Treasurer	10 Years**	Hard Copy	

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Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
6000	<u>FINANCIAL RECORDS</u>				
6215	Tax Anticipation Notes (Records borrowing against future tax collections)	Treasurer	10 Years**	Hard Copy	
6216	State Reimbursement Settlement Sheets	Treasurer	5 Years**	Hard Copy	
6217	Unemployment Claims	Treasurer	5 Years	Hard Copy	
6218	Employee Bonds, Board Member Bonds	Treasurer	5 Years	Hard Copy	
6219	Certificate of Estimated Resources	Treasurer	15 Years after expiration	Hard Copy	
6220	Appropriation Resolutions	Treasurer	5 Years	Hard Copy	
6222	Tax Apportionments (Semi-Annual)	Treasurer	5 Years	Hard Copy	
6301	Canceled Checks and Bank Settlements	Treasurer	4 Years**	Hard Copy	
6302	Publication Notice	Treasurer	4 Years**	Hard Copy	
6303	Tuition Fees and Payments	Treasurer	4 Years**	Hard Copy	
6304	School Finance (S.F.) Monthly Statements	Treasurer	4 Years**	Hard Copy	
6305	Investment Records (May include individual record of investments, bank confirmations, wire transfers, copy of CD, etc.)	Treasurer	4 Years**	Hard Copy	
6306	Travel Expense Reports	Treasurer	10 Years**	Hard Copy	
6307	State Sales Tax Reports	Treasurer	4 Years**	Hard Copy	
6308	Student Activity Fund (Pay-in, Pay outs, Receipts/Deposits, Reports)	Treasurer	4 Years**	Hard Copy	
6309	Check Registers	Treasurer	4 Years**	Hard Copy	
6310	Deposit Slips/Cash Proofs	Treasurer	4 Years**	Hard Copy	
6311	Bids and Specifications (Unsuccessful)	Treasurer	1 Year**	Hard Copy	
6312	Bids and Specifications (Successful)	Treasurer	4 Years after completion of project**	Hard Copy	
6313	Receipt Books	Treasurer	4 Years**	Hard Copy	
6314	Extra Trip Records	Treasurer	4 Years**	Hard Copy	
6315	Monthly Financial Reports	Treasurer	4 Years**	Hard Copy	
6316	Accounting Data	Treasurer	4 Years**	Hard Copy	
6317	Service Contracts	Treasurer	4 Years**	Hard Copy	
6318	State Subsidy Reports (Applications for Driver Education, Pupil Transportation, Special Education, etc.)	Treasurer	3 Years**	Hard Copy	

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Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
6000	FINANCIAL RECORDS				
6319	Delivery/Packing Slips	Treasurer	1 Year**	Hard Copy	
6401	Requisitions	Treasurer	1 Year*	Hard Copy	

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7000	<u>PAYROLL RELATED</u>				
7001	Payroll Ledgers Bi-Weekly Payroll Reports, Quarterly Payroll Reports	Treasurer	Permanent****	Hard Copy	
7102	Earning Registers By Staff Members By Calendar Year	Treasurer	Permanent****	Hard Copy	
7103	Monthly Payroll Reports (Leave Usage and Accumulation, Retirement Service, etc.)	Treasurer	Permanent**	Hard Copy	
7201	Bureau of Employment Service Quarterly Reports	Treasurer	7 Years	Digital	
7301	W-2's and W-4's (Employer Copy)	Treasurer	6 Years and Current**	Digital	
7302	Federal Income Tax (Quarterly/Annual)	Treasurer	6 Years and Current**	Digital	
7303	Ohio Income Tax (Monthly/Annual)	Treasurer	6 Years and Current**	Digital	
7304	City Income Tax (Monthly/Annual)	Treasurer	6 Years and Current**	Digital	
7305	School Income Tax (Monthly/Annual)	Treasurer	6 Years and Current**	Digital	
7306	Payroll Reports - Reports used for each payroll-computer generated	Treasurer	4 Years**	Digital	
7307	Payroll Update Listing	Treasurer	4 Years**	Digital	
7308	Payroll Calculations	Treasurer	4 Years**	Digital	
7309	State Teachers System and School Employees Retirement System Waivers	Treasurer	Permanent****	Hard Copy	
7310	State Employees Retirement System (SERS Reports)	Treasurer	4 Years**	Hard Copy	
7311	State Teachers Retirement System (STRS) Reports	Treasurer	4 Years**	Hard Copy	
7312	Annuity Reports	Treasurer	4 Years**	Hard Copy	
7313	Benefit Folders/Reports	Treasurer	4 Years**	Hard Copy	
7314	Employee Request and/or Authorization for Leave Forms (Sick, Vacation, Personal, or other leave)	Treasurer	4 Years**	Hard Copy	
7315	Deduction Reports (Voluntary Payroll Deductions)	Treasurer	4 Years**	Hard Copy	
7316	Employee Vacation/Sick Leave Records	Treasurer	4 Years**	Hard Copy	
7317	Time Sheets	Treasurer	6 Years**	Hard Copy	
7318	Overtime Authorization	Treasurer	6 Years	Hard Copy	
7000	<u>PAYROLL RELATED</u>				

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7319	Employee Insurance Bills (Medical, Dental, Life, etc.)	Treasurer	4 Years**	Hard Copy	
7323	Paycheck Register	Treasurer	4 Years**	Hard Copy	
7324	Payroll Bank Statement	Treasurer	4 Years**	Hard Copy	
7401	Deduction Authorization	Treasurer	Until Superseded or Employee Terminated	Hard Copy	

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8000	REPORTS				
8201	State Audit Reports	Treasurer	5 Years	Digital	
8202	#59, #659 and #4502	Treasurer	5 Years	Hard Copy	
8203	#25 and #625	Treasurer	5 Years	Hard Copy	
8204	School Finance (S.F.) Reports-Annual	Treasurer	5 Years	Hard Copy	
8205	Special Education (S.E.) Reports - Annual	Director of Special Education & Secretary	7 Years	Hard Copy	
8206	Vocational Education (V.E.) Reports-Annual	N/A	5 Years	Hard Copy	
8207	Ohio Common Core Data (OCCD) Reports	Supt. Secretary	5 Years	Hard Copy	
8209	Ohio Department of Education (ODE) Reports	EMIS Coordinator	5 Years	Hard Copy	
8211	Civil Rights Reports	Superintendent	Permanent****	Hard Copy	
8212	Title IX Reports	EMIS Coordinator	10 Years	Hard Copy	
8213	SM-1 & SM-2 (Annual and Quarterly)	Treasurer	10 Years	Digital	
8214	State Minimum Standards	Curriculum Director	10 Years	Hard Copy	
8301	Personnel State Reports(Currently SF-1, CS-1)	Treasurer	4 Years**	Hard Copy	
8302	Worker's Comp Wage Reports (Co. Auditor)	Treasurer	5 Years	Hard Copy	
8303	Bank Balance Certification (Co. Auditor)	Treasurer	5 Years	Hard Copy	
8304	Transportation Reports	Transportation Supervisor	4 Years**	Hard Copy	

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Schedule Number	Record Title and Description	Person Responsible	Retention Period	Media Type	For use by Auditor of State or OHS_LGRP
9000	OTHER				
9101	Personnel Directory	Superintendent Secretary	10 Years	Hard Copy	
9102	Enrollment Record (by grade and building)	Building Secretary	Permanent****	Hard Copy	
9202	School Calendars	Supt. Secretary	5 Years	Hard Copy	
9203	Building, Boiler, Maintenance Reports	Maintenance Supervisor	2 Years*	Hard Copy	
9402	Employee Handbooks	Superintendent Secretary	Until Superseded	Hard Copy	
9403	Directives, Standards, Laws for Local, State and Federal Government Agencies	All Secretaries	Until Superseded	Hard Copy	
9404	Attendance Records	Bldg Secretaries	Until Superseded	Hard Copy	

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