



Ohio Historical Society
State Archives of Ohio
Local Government Records Program

800 E. 17th Avenue
Columbus, Ohio 43211-2497

This retention schedule supersedes all previous retention schedules for the Finance Department approved by the Oberlin City Records Commission prior to July 7, 2023

Page 1 of 12

OHIO HISTORY CONNECTION

JULY 12 2023

STATE AND LOCAL
GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)

See instructions before completing this form.

Section A: Local Government Unit

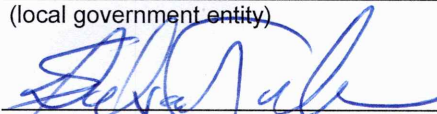
(To complete this form online, use "tab" key to jump from box to box.)

CITY OF OBERLIN

FINANCE OFFICE

(local government entity)

(unit)


(signature of responsible official)

SALVATORE TALARICO

FINANCE DIRECTOR

07/07/2023

(name)

(title)

(date)

Section B: Records Commission

CITY OF OBERLIN

440-775-7203

Records Commission

(telephone number)

85 S. MAIN ST.

OBERLIN

44074

LORAIN

(address)

(city)

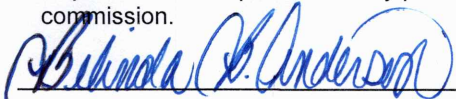
(zip code)

(county)

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

banderson@cityofoberlin.com

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.



7-7-2023

Records Commission Chair Signature

Date

Section C: Ohio Historical Society - State Archives

Government Records Archivist

8/3/2023

Signature

Title

Date

Section D: Auditor of State

Signature

Date

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



Section E: Records Retention Schedule

CITY OF OBERLIN

FINANCE OFFICE

(local government entity)

(unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Required by OHS- LGRP
	BUDGET (100)				
2023-101-FO	<u>Annual Appropriation Ordinances</u>	5 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-102-FO	<u>Annual Budget</u> Including Tax Budget, Amended Certificates, and Other Related Items.	5 years provided copy is filed with City Clerk.	Paper and/ or Electronic		<input type="checkbox"/>
2023-103-FO	<u>Annual Budget - (Working Papers)</u>	5 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-104-FO	<u>Annual Financial Reports and Operating Statements</u>	Permanent.	Paper		<input checked="" type="checkbox"/> ✓
2023-105-FO	<u>Audit Reports</u>	Permanent.	Paper		<input checked="" type="checkbox"/> ✓
2023-106-FO	<u>Audit Work Papers</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-107-FO	<u>Capital Improvement Bonds & Notes</u>	3 years after paid off, provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-108-FO	<u>Line Item Transfer Sheets</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-109-FO	<u>Receipts and Expenditures Report to Auditor of State</u>	10 years.	Paper		<input type="checkbox"/>



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	FINANCE (200)				
2023-201-FO	<u>Accident/Incident Reports</u>	6 years following closing/settlement.	Paper and/ or Electronic		<input type="checkbox"/>
2023-202-FO	<u>Automated Clearing House (ACH) Proof Reports</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-203-FO	<u>Automated Clearing House (ACH) Authorization Forms</u>	Retain until superseded or termination of employment / account.	Paper and/ or Electronic		<input type="checkbox"/>
2023-204-FO	<u>Annual Insurance Renewal Supporting Documents</u>	3 years after policy expiration.	Paper and/ or Electronic		<input type="checkbox"/>
2023-205-FO	<u>Bankruptcy Notifications</u>	10 years after discharge.	Paper		<input type="checkbox"/>
2023-206-FO	<u>Bonds of Officials and Employees</u>	10 years.	Paper		<input type="checkbox"/>
2023-207-FO	<u>Bond Register</u>	Permanent.	Paper		<input checked="" type="checkbox"/> ✓
2023-208-FO	<u>Canceled Checks</u>	3 years provided audited.	Paper, CD-ROM, and/ or Electronic		<input type="checkbox"/>
2023-209-FO	<u>Capital Asset Acquisitions / Deletions</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-210-FO	<u>Capital Assets Inventory</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-211-FO	<u>Check Copies / Payroll Electronic Funds Transfer (EFT) Deduction Checks</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-212-FO	<u>Community Organization Funding Applications and Related Items</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-213-FO	<u>Court Apportionment and Related Items</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-214-FO	<u>Expendable Supplies Inventory</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-215-FO	<u>Insurance Claims</u> Closed.	6 years following closing/settlement.	Paper and/ or Electronic		<input type="checkbox"/>
2023-216-FO	<u>Insurance Policies</u>	5 years after expiration, provided all claims settled.	Paper and/ or Electronic		<input type="checkbox"/>
2023-217-FO	<u>Monthly Bank Statements, Reconciliations, and Investment Related Records</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-218-FO	<u>Monthly Department Phone Log</u>	2 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-219-FO	<u>Office Supply Inventory</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-220-FO	<u>Surplus Sales Records</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-221-FO	<u>Vehicle E-Checks</u>	2 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
	REVENUE (300)				
2023-301-FO	<u>License Fees / Gasoline Tax</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-302-FO	<u>Lodging Tax</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-303-FO	<u>Miscellaneous Revenue Invoices</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-304-FO	<u>Municipal Court Revenue</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-305-FO	<u>Property Tax Settlement Reports</u>	6 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-306-FO	<u>Receipts</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-307-FO	<u>Receipts Journal</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-308-FO	<u>Revenue/Disbursement Packets</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-309-FO	<u>Special Assessments</u>	2 years after final collection.	Paper and/ or Electronic		<input type="checkbox"/>
	PAYROLL (400)				
2023-401-FO	<u>Employee Attendance Records</u>	Permanent.	Paper		<input type="checkbox"/>
2023-402-FO	<u>Employee Pay Records</u> Payroll Year End	Permanent.	Paper		<input type="checkbox"/>
2023-403-FO	<u>Employee Health Insurance Enrollment and Change Forms</u>	3 years after date employment ends.	Paper and/ or Electronic		<input type="checkbox"/>
2023-404-FO	<u>Employer Quarterly Tax Return</u>	4 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-405-FO	<u>Flexible Spending Account (FSA) Records</u>	Retain for 2 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-406-FO	<u>Health Insurance Plan and Related Documents</u>	Retain for 6 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-407-FO	<u>Miscellaneous Employee Withholdings Files</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-408-FO	<u>Payroll Database</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-409-FO	<u>Payroll form I-9s</u> <u>Employment Eligibility Verification Forms.</u>	3 years after date employment ends.	Paper and/ or Electronic		<input type="checkbox"/>
2023-410-FO	<u>Payroll Posting Journal</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-411-FO	<u>Payroll Register- Monthly and Quarterly</u>	Until incorporated into year-end report.	Paper and/ or Electronic		<input type="checkbox"/>
2023-412-FO	<u>Pension Reports</u>	50 Years.	Paper		<input type="checkbox"/>
2023-413-FO	<u>Payroll Files</u> Retain permanent record of service time, salary history, leaves balances, taxes paid, resignation letter, retirement information and waivers.	Purge files 10 years after termination.	Paper		<input type="checkbox"/>
2023-414-FO	<u>Reports to Bureau of Employment Services and Bureau of Workers' Compensation</u>	Retain for 2 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-415-FO	<u>Time Off Requests</u>	3 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-416-FO	<u>Time Sheets</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-417-FO	<u>Voided Payroll Checks</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-418-FO	<u>W-2 Wage Statement Forms for City Employees</u>	10 years provided audited.	Paper		<input type="checkbox"/>
2023-419-FO	<u>Workers' Compensation Files</u>	10 years after final payment.	Paper		<input type="checkbox"/>
	ACCOUNTS PAYABLE (500)				
2023-501-FO	<u>Invoices</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-502-FO	<u>Purchase Order Request Forms</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-503-FO	<u>Purchase Orders</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-504-FO	<u>Revenue and Expenses</u> Monthly Report.	Until incorporated into year-end report.	Paper and/ or Electronic		<input type="checkbox"/>
2023-505-FO	<u>Revenue and Expenses</u> Year-End Report.	10 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-506-FO	<u>W-9s</u> Request for Tax Identification Numbers.	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
	INCOME TAXES (600)				
2023-601-FO	<u>Daily Cash Receipts Report</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-602-FO	<u>Employers Quarterly Tax Return</u>	4 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-603-FO	<u>Final Return For The Year, Income Tax</u>	6 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-604-FO	<u>Income Tax Lawsuits, Judgments and Other Related Correspondence</u>	10 years provided no action.	Paper		<input type="checkbox"/>
2023-605-FO	<u>Refund Check Ledger</u>	5 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-606-FO	<u>Tax Settlements and Accounts Receivable</u>	6 years, provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-607-FO	<u>W-2 Wage Statement Forms</u> (City Income Tax Payers)	6 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-608-FO	<u>1099 Miscellaneous Income Reporting Forms</u>	6 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
	UTILITIES (700)				
2023-701-FO	<u>Customer Applications for Service</u>	2 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-702-FO	Deposits Master File.	Permanent.	Paper		<input type="checkbox"/>
2023-703-FO	<u>Electric Kilowatt (KWH) Tax Reports</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-704 -FO	<u>Property Owner</u> (Landlord) Letters.	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-705-FO	<u>Shut-off/Delinquent Notices</u>	3 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-706-FO	<u>Utility and Refuse Billing Support Documents</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-707-FO	<u>Utility Collection Records / NSF Records</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-708-FO	<u>Utility Customer Miscellaneous Files</u>	Retain until no longer of administrative use.	Paper and/ or Electronic		<input type="checkbox"/>
2023-709-FO	<u>Utility Deposit Interest Journal</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-710-FO	<u>Utility Level / Budget Billing Authorization Letters</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-711-FO	<u>Utility Rate Change Information</u>	6 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-712-FO	<u>Utility Write-off Reports and Supporting Documents</u>	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-713-FO	<u>Vouchers</u> Payment Assistance.	3 years provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
	GENERAL ADMINISTRATIVE (800)				
2023-801-FO	<u>Advertising</u> Personnel ads, tear sheets, posting/vacancies.	2 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-802-FO	<u>Applications for Employment (not hired)</u>	2 years after receipt.	Paper and/ or Electronic		<input type="checkbox"/>
2023-803-FO	<u>Bids – Successful</u>	Life of equipment or 3 years after services.	Paper and/ or Electronic		<input type="checkbox"/>
2023-804-FO	<u>Bids - Unsuccessful</u>	2 years after contract award, provided audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-805-FO	<u>Blank forms</u>	Until revised, obsolete or superseded.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-806-FO	<u>Bulletins, Posters and Notices to Employees</u>	Retain until no longer of administrative value.	Paper and/ or Electronic		<input type="checkbox"/>
2023-807-FO	<u>Business Card/Rotary & Rolodex Files</u>	Until obsolete or superseded.	Paper and/ or Electronic		<input type="checkbox"/>
2023-808-FO	<u>Computer generated reports (non-specific)</u> <u>Administrative and Financial Reports – Periodic</u>	Until no longer of an administrative value or fiscal value.	Paper and/ or Electronic		<input type="checkbox"/>
2023-809-FO	<u>Copies</u> Reading, Informational and Reference.	Retain until no longer of an administrative value. (No RC-4 required)	Paper and/ or Electronic		<input type="checkbox"/>
2023-810-FO	<u>Correspondence and Inquiries</u>	Retain for 6 months. File with related records if content requires longer retention.	Paper and/ or Electronic		<input type="checkbox"/>
2023-811-FO	<u>Correspondence (email)</u>	Retain for 6 months. File with related records if content requires longer retention.	Paper and/ or Electronic		<input type="checkbox"/>
2023-812-FO	<u>Correspondence (Unsolicited)</u>	Retain until no longer of administrative value,	Paper and/ or Electronic		<input type="checkbox"/>
2023-813-FO	<u>Daily, Weekly, Monthly & Yearly Appointment Books/Calendars/Schedules/Organizers/ Planners.</u>	Continually updated, revised or erased. Retain until no longer of administrative use.	Paper and/ or Electronic		<input type="checkbox"/>
2023-814-FO	<u>Drafts</u>	Retain until no longer of administrative value, obsolete, or superseded (No RC-4 required).	Paper and/ or Electronic		<input type="checkbox"/>
2023-815-FO	<u>Equipment Operating & Maintenance Manuals</u>	Life of Equipment.	Paper and/ or Electronic		<input type="checkbox"/>
2023-816-FO	<u>Evaluations (Annual)</u> Maintained in Personnel files.	Active +6 years (inactive when no longer employed).	Paper and/ or Electronic		<input type="checkbox"/>
2023-817-FO	<u>Facsimile Logs / Cover Sheets / Confirmation Notices / Activity Printouts</u>	Until no longer of administrative value.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-818-FO	<u>Faxed Items</u>	1 year and no longer of administrative value.	Paper and/ or Electronic		<input type="checkbox"/>
2023-819-FO	<u>General Orders, Directives, Policies, Rules, Regulations or Procedures</u>	Until superseded, retain one copy until audited.	Paper and/ or Electronic		<input type="checkbox"/>
2023-820-FO	<u>Manuals, Bulletins and Other Reference Materials</u>	Until superseded, obsolete or replaced.	Paper and/ or Electronic		<input type="checkbox"/>
2023-821-FO	<u>PC/Computer System Backup Files</u>	Retain 3 different time intervals of backups: 5 most recent year-end, 3 most recent month-end, and 5 most recent daily tapes, then erase & reuse tapes, disks or cartridges.	Electronic		<input type="checkbox"/>
2023-822-FO	<u>PC/Computer System/Servers-Hard Drives, RAM, Disks, Diskettes, Tapes, Cartridges and similar electronic storage media.</u>	Format, reformat, overwrite, erase, delete or destroy data and media as administratively necessary.	Electronic		<input type="checkbox"/>
2023-823-FO	<u>Personnel files for Finance Department</u> Including employment application and pertinent employee documents.	Retain for 10 years after separation or termination of employment.	Paper		<input type="checkbox"/>
2023-824-FO	<u>Petitions</u> Referendum and Initiatives.	5 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-825-FO	<u>Postal Receipts</u> Certified Letter Receipts/ Returned Correspondence and Documents.	1 year.	Paper and/ or Electronic		<input type="checkbox"/>
2023-826-FO	<u>Records Requests</u>	2 years.	Paper and/ or Electronic		<input type="checkbox"/>
2023-827-FO	<u>Record Retention Compliance File</u> RC-1, RC-2, RC-3, and RC-4 (Internal Disposition form)	Permanent.	Paper and/ or Electronic		<input type="checkbox"/>
2023-828-FO	<u>Record Retention Compliance File</u> Inventory Forms.	Retain until no longer of administrative value, obsolete or superseded.	Paper and/ or Electronic		<input type="checkbox"/>



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2023-829-FO	<u>Reports and Studies</u>	Until no longer of administrative value.	Paper and/ or Electronic		<input type="checkbox"/>
2023-830-FO	<u>Subject Files</u> This record series documents various projects, issues, programs, and activities overseen or managed by the office including but not limited to correspondence, printed emails, plans, proposals, presentations reports, and memoranda.	2 years or until no longer of administrative value.	Paper and/ or Electronic		<input type="checkbox"/>
2023-831-FO	<u>Telephone Messages & Voicemails</u>	Until no longer of administrative value.	Paper and/ or Electronic		<input type="checkbox"/>
2023-832-FO	<u>Transient Records</u> This record series includes limited documents which serve to convey information of temporary importance in lieu of oral communication.	Retain until no longer of administrative value, obsolete or superseded. (No RC-4 Required)	Paper and/ or Electronic		<input type="checkbox"/>

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