

**4/12/2023 | 2:00 PM**

**MUNICIPAL SERVICES CENTER, COUNCIL CHAMBER  
3600 TREMONT ROAD**

- 1. Call to Order/Roll Call**
- 2. Approval of Minutes**
  - a. Approve Records Commission Meeting Minutes from September 14, 2022
- 3. Approve Updated Records Retention Schedule**
  - a. Proposed Records Retention Schedule Updates
- 4. Updates & Reports**
- 5. Adjournment**

**September 14, 2022 | 2:30 p.m.**

**Centennial Meeting Room**

**Members Present:**

City Manager Steven Schoeny  
Assistant City Attorney Darlene Pettit  
Finance Director Brent Lewis  
Citizen Representative Sara Nagai

**Staff Present:**

City Clerk Krystal Gonchar  
Deputy City Clerk Yelena Parks  
Public Service Director Gary Wilfong

**CALL TO ORDER**

The meeting was called to order at 2:35 p.m. Assistant City Attorney Darlene Pettit served as designee for City Attorney Darren Shulman.

**APPROVAL OF MEETING MINUTES**

1. The Finance Director moved, seconded by Mrs. Nagai, to approve the minutes for February 23, 2022, Records Commission Meeting.

**VOTING AYE:** Lewis, Nagai, Schoeny, Pettit

**VOTING NAY:** None

Motion carried.

**ACTION/DISCUSSION ITEMS**

2. Approval of Amended Schedule of Records Retention and Disposition

The City Clerk reviewed the proposed changes with the Commission and stated that most of the changes were clean-up in nature. There were substantial changes to the Public Service Department- All Divisions. City Manager Schoeny and Finance Director Lewis expressed concern over the termination of the Inventory Report Safety Equipment & Personal Protection Equipment records (attached hereto and incorporated herein by reference as Exhibit A.) It was then agreed that the City Clerk would include, rather than remove those records until a further inquiry into what type of safety records are being removed. City Manager Schoeny suggested adding Public Service Director Wilfong to the meeting to assist the Commission in determining the source of the Safety records. Service Director Wilfong joined the Commission but needed additional time to review his notes and provide the Commission with the necessary information. The City Clerk removed items PS-112 AND PS-113 from the list of deletions on the All Divisions Proposed Retention Schedule until the Commission has all needed information on the matter.

Assistant City Attorney Pettit spoke of item PS-223, Trash photos, referring to the Sanitation workers taking pictures of residents' trash pick-up as proof for collection in cases when the bins were not present on pick-up days. Assistant Attorney Pettit expressed that she does not believe that the City keeps track of the pictures long-term.

After reviewing all the items on the Public Service Department Retention Schedule by the Records Commission, City Manager Schoeny called for a vote to approve

The City Attorney Pettit moved, seconded by Finance Director Lewis, to approve the Amended Schedule of Records Retention and Disposition (attached hereto and incorporated herein by reference as Exhibit A.)

**VOTING AYE:** Lewis, Nagai, Schoeny, Pettit

**VOTING NAY:** None

Motion carried.

### 3. Historical Meeting Minute Books- Discussion

Citizen Representative Sara Nagai inquired about the City's historical books as discussed at the February 23, 2022 meeting. Specifically, if the City would keep them or if the Library would take over those records. The City Clerk expressed that it is best that they are kept in possession of the City in our off-site storage facility. Ms. Nagai expressed her support of the decision.

## **ADJOURNMENT**

There being no further business to come before the Records Commission, the City Manager moved, seconded by Assistant City Attorney, to adjourn.  
The meeting was adjourned at 2:54 p.m.

**CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

Exhibit A

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PS-100	<b>Requests for Service</b>	3 years <del>After Issue is Resolved</del>	Multi	<input type="checkbox"/>
PS-101	<b>Work Orders</b>	5 years <del>After Issue is Resolved</del>	Multi	<input type="checkbox"/>
<del>PS-102</del>	<del><b>General Administrative Files</b></del>	<del>3 Year(s) and No Longer of an Admin. or Legal Value</del>	<del>Multi</del>	<input type="checkbox"/>
<del>PS-103</del>	<del><b>Studies—Private Consultants</b></del>	<del>5 year(s) and No Longer of an Admin. or Legal Value</del>	<del>Multi</del>	<input type="checkbox"/>
<del>PS-104</del>	<del><b>Studies—Conducted by the City</b></del>	<del>5 year(s) and No Longer of an Admin. or Legal Value</del>	<del>Multi</del>	<input type="checkbox"/>
<del>PS-105</del>	<del><b>Petty Cash Records</b></del>	<del>3 Year(s) provided Audited</del>	<del>Multi</del>	<input type="checkbox"/>
<del>PS-106</del>	<del><b>Traffic Safety Coordinating Committee—Agendas, Minutes &amp; Correspondence</b></del>	<del>5 Year(s) and No Longer of an Admin. or Legal Value</del>	<del>Multi</del>	<input type="checkbox"/>
PS-102	<b>Traffic Counts &amp; Street Light Studies</b>	5 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
<del>PS-108</del>	<del><b>Street Records</b></del>	<del>Until No Longer of an Admin. Value</del>	<del>Multi</del>	<input type="checkbox"/>
<del>PS-109</del>	<del><b>Non-Capital Project Files</b></del>	<del>5 Year(s) and No Longer of an Admin. or Legal Value</del>	<del>Multi</del>	<input type="checkbox"/>
PS-103	<b>O.U.P.S. Requests</b>	5 years <del>and No Claims or Legal Actions Pending</del>	Multi	<input type="checkbox"/>
PS-104	<b>Annual Reports- Divisional</b> (Weekly Reports- Activities Summaries incorporated into annual report)	<del>7 5 years After Incorporated into City Annual Report and No Longer of an Admin. Value</del>	Multi	<input type="checkbox"/>
<del>PS-112</del>	<del><b>Inventory Report Safety Equipment &amp; Personal Protection Equipment</b></del>	<del>6 Year(s) After Case Revised or Rescinded</del>	<del>Multi</del>	<input type="checkbox"/>
<del>PS-113</del>	<del><b>Safety Audits (Facilities &amp; Departments)</b></del>	<del>6 Year(s) And No Longer of an Admin. Value</del>	<del>Multi</del>	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PS-105	Maps, Plans, Renderings, Plots- City of Upper Arlington Infrastructure (Includes Water, Storm & Waste Water)	Permanent	Multi	<input type="checkbox"/>
PS-201	<del>Neighborhood Lighting Committee Agendas, Minutes &amp; Recommendations</del>	<del>5 Year(s) and No Longer of an Admin. or Legal Value</del>	<del>Multi</del>	<input type="checkbox"/>
PS-106	Capital Projects/ Plans & Specifications	25 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-107	Permits- Storm Water & Right of Way	3 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-108	NPDES- National Pollution Discharge Elimination Systems	5 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-109	Exhibits, Plans, Drawings, Plots, Maps & Renderings (Projects not approved or undertaken)	Until No Longer of an Admin. Value	Multi	<input type="checkbox"/>
PS-110	Annual Street Maintenance Program	5 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-111	Pavement Inspection Records	5 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-112	Culvert Inspection Program	5 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-113	<del>Daily</del> Projects/ Inspection Work Log	Incorporate into Project Files	Multi	<input type="checkbox"/>
PS-114	Master Plan- Traffic	25 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-115	Benchmark Information	Until Obsolete, Superseded or No Longer of Admin. Value	Multi	<input type="checkbox"/>
PS-116	Statements of Qualifications	Until No Longer of Admin. Value	Multi	<input type="checkbox"/>
PS-117	Records of Private Wells & Sanitation Systems	Until No Longer of Admin. Value	Multi	<input type="checkbox"/>
PS-214	<del>Daily Call-In Log</del>	<del>3 Year(s)</del>	<del>Multi</del>	<input type="checkbox"/>
PS-215	<del>Bill Backs</del>	<del>3 Year(s) provided Audited</del>	<del>Multi</del>	<input type="checkbox"/>
PS-118	Vehicle & Equipment Maintenance Records	Life of Equipment	Digital	<input type="checkbox"/>
PS-217	<del>Vehicle &amp; Equipment Maintenance &amp; Operating Manuals</del>	<del>Life of Equipment or Revised or Rescinded</del>	<del>Computer</del>	<input type="checkbox"/>
PS-218	<del>Charge-Back Program</del>	<del>3 Year(s) Provided Audited</del>	<del>Computer</del>	<input type="checkbox"/>
PS-119	Aerial Device Inspection Records	Life of Equipment	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PS-120	EPA- Waste Oil Disposal Records	<del>7-5 Years and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-121	Underground Storage Tank Records	<del>5 Years and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-122	Preventative Maintenance Programs	<del>3 years and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
<del>PS-223</del>	<del>Trash Photos</del>	<del>Until No Longer of Admin. Value</del>	<del>Multi</del>	<input type="checkbox"/>
PS-123	SWACO- Solid Waste Authority of Central Ohio- General Records	3 years	Multi	<input type="checkbox"/>
PS-124	Daily Vehicle Inspections	Until No Longer of an Administrative Value	Multi	<input type="checkbox"/>
PS-125	Conflict Monitoring Test Reports	<del>5 years 3-Year(s) and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-302	<del>O.U.P.S. Requests</del>	<del>5-Year(s) and No Claims or Legal Action Pending</del>	<del>Multi</del>	<input type="checkbox"/>
PS-303	<del>Request for Service</del>	<del>Until Data Incorporated into Computer Database and Accuracy Verified</del>	<del>Multi</del>	<input type="checkbox"/>
PS-304	<del>Work Orders</del>	<del>Until Data Incorporated into Computer Database and Accuracy Verified</del>	<del>Multi</del>	<input type="checkbox"/>
PS-126	Non-Periodic Reports	Until No Longer of an Administrative Value	Multi	<input type="checkbox"/>
PS-127	Street Sweeper Log/ Daily	1 year	Multi	<input type="checkbox"/>
<del>PS-307</del>	<del>Preventative Maintenance Program Records</del>	<del>Until Revised, Superseded or Discontinued</del>	<del>Multi</del>	<input type="checkbox"/>
PS-128	Street Light Maintenance Records	<del>3 years and No Longer of an Admin. Value</del>	Multi	<input type="checkbox"/>
PS-129	Maintenance & Repair Records- Storm Water & Sewer Collections	<del>5 years and No Longer of an Admin. Value</del>	Multi	<input type="checkbox"/>
PS-310	<del>Back Flow Testing (Municipal Facilities)</del>	<del>1 Year(s)</del>	<del>Multi</del>	<input type="checkbox"/>
PS-130	Confined Space <b>Entry</b> Records	<del>1 year and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-312	<del>Work Requests</del>	<del>Until Data Incorporated into Computer Database and Accuracy Verified</del>	<del>Multi</del>	<input type="checkbox"/>
PS-131	Emergency Response Requests	<del>3 years and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PS-132	Sewer Inspections VCR Tapes/ DVD's	Until No Longer of Administrative Value, <del>Erase and Reuse</del>	Multi	<input type="checkbox"/>
PS-133	Sewer Cleaning Program Log	10 years	Multi	<input type="checkbox"/>
PS-134	Right of Entry Permits	1 years <del>and No Actions Pending</del>	Multi	<input type="checkbox"/>
PS-135	Fire Hydrant Repair Reports	5 years <del>and No Longer of an Admin. or Legal Value</del>	Multi	<input type="checkbox"/>
PS-137	Catch Basin Maintenance Records	5 years	Multi	<input type="checkbox"/>
PS-138	Culvert Inspection & Cleaning Records	5 years	Multi	<input type="checkbox"/>
PS-139	Sewer Back Up Records/ Surcharge	10 years	Multi	<input type="checkbox"/>
PS-140	Man Hole Rehabilitation Program	5 years	Multi	<input type="checkbox"/>
PS-141	Interceptor Program Reports (for Fats, Oils, and Grease (FOG) Program)	5 years	Multi	<input type="checkbox"/>
PS-142	Commercial Establishments- Interceptor Cleaning Reports	5 years	Multi	<input type="checkbox"/>
PS-143	<del>Weekly Reports Activities Summaries</del>	<del>Until Incorporated into Annual Report and No Longer of an Administrative Value</del>	Multi	<input type="checkbox"/>

**[INSERT OHC RC-2 PAGE 1 HERE]**

**Please leave this page in current location in excel file and leave blank. This page is used for printing an RC-2 to be submitted to the OHC and calculating the correct page number.**

**CITY OF UPPER ARLINGTON: GENERAL  
PROPOSED RETENTION SCHEDULE (RC-2)**

*\*please review your Department RC-2 as some records have longer retention periods required.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
GEN-100	<b>Policies, Procedures, Rules &amp; Regulations</b>	6 years	Multi	<input type="checkbox"/>	
GEN-101	<b>Non-public Zoom, Microsoft Teams, Other Collaborative Tool Recorded Meetings, Comments/Chat Entries</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-102	<b>Correspondence</b> (includes information concerning policies, programs, projects, fiscal and personnel matters of significant importance; includes internal/external correspondence and information and miscellaneous inquiries)	2 years	Multi	<input type="checkbox"/>	
GEN-103	<b>Transient Correspondence</b> (includes correspondence that conveys information of temporary importance; often in lieu of oral communications, such as phone messages, reminders, appointment notices, etc.; also includes unsolicited correspondence and form letters)	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-104	<b>Bulletins, Posters, General Notices and Displays</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-105	<b>Blank Forms</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-106	<b>Awards, Newspaper Articles and Clippings</b>	until no longer of administrative or historical value	Multi	<input checked="" type="checkbox"/>	
GEN-107	<b>Professional Organization &amp; Association files</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-108	<b>Equipment Maintenance &amp; Repair Records</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-109	<b>Computer Generated Administrative &amp; Fiscal Reports</b> (nonspecific and periodic)	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-110	<b>Business Cards</b> (rotary, rolodex, and applicable software files)	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-111	<b>Planning/Scheduling/Calendar/Training Information and Data on: Display Boards, Erasable and Dry Erase Boards, Chalkboards, Easel Pads and Electronic Media</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-112	<b>Hourly/Daily/Weekly/Monthly and Annual Appointment Books, Records, Calendars, Schedules, Organizers and Planners</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: GENERAL  
PROPOSED RETENTION SCHEDULE (RC-2)**

*\*please review your Department RC-2 as some records have longer retention periods required.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
GEN-113	<b>Lists/Rosters/Informational Directories</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-114	<b>Unfounded complaints - complaint concerning a city employee which was investigated and determined unfounded</b>	1 year	Multi	<input type="checkbox"/>	
GEN-115	<b>Photographs, Negatives and Electronic Images</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-116	<b>Material Safety Data Sheets</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-117	<b>Legal Advertisements or Notices</b>	10 years	Multi	<input type="checkbox"/>	
GEN-118	<b>Grant- Applications (Not funded): Applications for grants submitted by the city and to the city</b>	1 year after decision rendered	Multi	<input type="checkbox"/>	
GEN-119	<b>Drafts &amp; Notes</b> (drafts of documents and notes used to create a final version of a document)	until no longer of administrative value	Multi	<input type="checkbox"/>	
GEN-120	<b>Public Meeting Audio and Video Recordings (other than City Council)</b>	1 year	Multi	<input type="checkbox"/>	
GEN-121	<b>Studies &amp; Reports</b>	5 years	Multi	<input type="checkbox"/>	
GEN-122	<b>Facility Visitor Records</b>	30 days	Multi	<input type="checkbox"/>	newly added series to coincide with new bldg. safety
GEN-123	<b>Facility Video Recording</b>	60 days	digital	<input type="checkbox"/>	pulled from PD

**CITY OF UPPER ARLINGTON: CITY ATTORNEY'S OFFICE**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
ATY-100	<b>City Attorney Opinions: Formal opinions intended to reflect the City Attorney's opinion regarding interpretation of codified ordinances</b>	15 years	Multi	<input checked="" type="checkbox"/>
ATY-101	<b>City Attorney Memorandum</b>	Until superseded, amended, or withdrawn	Multi	<input type="checkbox"/>
ATY-102	<b>Log- City Attorney Opinions</b>	continually updated	Multi	<input type="checkbox"/>
ATY-103	<b>Legal Correspondence</b>	2 years	Multi	<input type="checkbox"/>
ATY-104	<b>Annual Reports</b>	permanent	Multi	<input checked="" type="checkbox"/>
ATY-105	<b>Litigation Case Files - Claims Against the City</b>	5 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
ATY-106	<b>Case Files- Claims Against the City With No Court Actions</b>	5 years after claims settled	Multi	<input type="checkbox"/>
ATY-107	<b>Prosecutor Case Files - Criminal and Domestic Violence</b>	5 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
ATY-108	<b>Prosecutor Case Files - Traffic</b> (except OVI)	current year plus 2 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
ATY-109	<b>Prosecutor Case Files - OVI</b>	current year plus 5 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
ATY-110	<b>Hold Harmless Agreements</b> (may be kept in other city departments)	permanent	Multi	<input type="checkbox"/>
ATY-111	<b>Exhibits</b>	2 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
ATY-112	<b>Mediation Program Case Files</b>	1 year after the date of the Final Order of the Court or 1 year after completion of mediation	Multi	<input type="checkbox"/>
ATY-113	<b>Mediation Program Participant Lists</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
ATY-114	<b>General Legal Files</b> (past City Attorneys and Law Clerks)	until no longer of administrative value	Multi	<input type="checkbox"/>
ATY-115	<b>Request for City Attorney Opinions</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
ATY-116	<b>Request for City Attorney Contract Approval</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
ATY-117	<b>Subject Matter Research Files</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
ATY-118	<b>Project Files</b>	5 years after completion	Multi	<input type="checkbox"/>
ATY-119	<b>Collective Bargaining Agreement- Negotiation Files</b>	6 years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY ATTORNEY'S OFFICE - PROBATION**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
ATY-200	<b>Probation Files</b> (judge's entry, probation intake information, probation officer case notes and relevant documents from court file, which can include waivers of counsel and jury trial, payment agreement forms, copy of citation/complaint)	5 years after probationer completes terms of probation	Multi	<input type="checkbox"/>
ATY-201	<b>Pre-sentence Investigation Reports</b>	once provided to the court, may be deleted by city	Multi	<input type="checkbox"/>
ATY-202	<b>Community Diversion Program Case Files</b>	criminal diversion: 3 years after the date of the final order of the court  traffic diversion: 90 days from the date of the final order of the court	Multi	<input type="checkbox"/>
ATY-203	<b>Community Diversion Program Participant List</b>	permanent	Multi	<input type="checkbox"/>
ATY-204	<b>Probation Rules &amp; Conditions</b>	most recent version plus prior versions in place within 4 years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY CLERK'S OFFICE**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
CCO-100	<b>City Council Meeting Agendas &amp; Minutes</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-101	<b>City Ordinances &amp; Resolutions</b> (including all attachments)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-102	<b>Ohio Public Records Compliance Folder</b> (may contain appropriate RC-1, RC-2, and RC-3 forms)	25 years	Multi	<input type="checkbox"/>
CCO-103	<b>Public Records Requests</b> (requests and request log, responses to requests)	2 years	Multi	<input type="checkbox"/>
CCO-104	<b>Boards, Commissions, Committees, Task Force and Appeals Agendas &amp; Minutes</b> (to include member appointments)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-105	<b>Audio &amp; Video Recordings of City Council Meetings</b>	2 years	Multi	<input type="checkbox"/>
CCO-106	<b>Petitions Submitted to Council</b>	5 years	Multi	<input type="checkbox"/>
CCO-107	<b>Legislative Annual Reports</b> (no longer creating this record)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-108	<b>Board of Elections Referendums</b>	permanent	Multi	<input type="checkbox"/>
CCO-109	<b>Street Name Changes</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-110	<b>City Charter - As Amended</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-111	<b>Real Estate &amp; City Property Files</b> (deeds, leases, vacations, alley & right-of-ways, easements, encroachments, dedications, abandonments, waivers, covenants & annexations)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-112	<b>Historical Journals - Village and City of Upper Arlington</b> (no longer creating this record)	permanent	Multi	<input checked="" type="checkbox"/>
CCO-113	<b>Master Plan</b>	permanent	Multi	<input checked="" type="checkbox"/>
CCO-114	<b>Mayoral Proclamations, Resolutions of Commendation and Resolutions of Appreciation</b>	2 years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY CLERK'S OFFICE**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
-----------------	----------------------------	------------------	------------	-----------------------

**CITY OF UPPER ARLINGTON: CITY MANAGER'S OFFICE**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

<b>Schedule Number</b>	<b>Record Title &amp; Description</b>	<b>Retention Period</b>	<b>Media Type</b>	<b>RC-3 Required by LGRP</b>
CMO-100	<b>City of Upper Arlington Master Plan</b>	permanent	Multi	<input checked="" type="checkbox"/>
CMO-101	<b>Employee Grams</b>	1 year	Multi	<input type="checkbox"/>
CMO-102	<b>Correspondence - City Manager</b>	3 years	Multi	<input type="checkbox"/>
CMO-103	<b>Insurance Policies</b> (general liability for the City)	10 years	Multi	<input type="checkbox"/>
CMO-104	<b>Permits</b> (events & activities, room rentals, block parties, solicitation, curb painting)	2 years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY MANAGER'S OFFICE - SAFETY & RISK MANAGEMENT**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

<b>Schedule Number</b>	<b>Record Title &amp; Description</b>	<b>Retention Period</b>	<b>Media Type</b>	<b>RC-3 Required by LGRP</b>
CMO-200	<b>Accident Reports - Vehicular or Equipment (non-injury)</b>	6 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
CMO-201	<b>Accident Reports - Vehicular or Equipment (personal injury)</b>	8 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
CMO-202	<b>Temperature Monitoring Records</b> (pursuant to COVID-19 orders)	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-203	<b>Risk Management Subrogation Claims</b>	4 years after case settled and all appeals exhausted	Multi	<input type="checkbox"/>
CMO-204	<b>Annual Summary Report</b> (city accident reports)	25 years	Multi	<input type="checkbox"/>
CMO-205	<b>Unsafe Condition Report &amp; Follow-up Actions</b>	6 years		<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY MANAGER'S OFFICE - COMMUNITY AFFAIRS**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
CMO-300	Annual Resident Report - Resident Guide	25 years	paper	<input checked="" type="checkbox"/>
CMO-301	Quarterly Newsletter - City Insight, monthly E-Newsletter	25 years	Multi	<input type="checkbox"/>
CMO-302	Community Events - Action Plan	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-303	Monthly Employee Newsletter	10 years	Multi	<input type="checkbox"/>
CMO-304	Press/News/Media Releases	3 years	Multi	<input type="checkbox"/>
CMO-305	Media Tapes - Videos	until no longer of administrative value	digital	<input type="checkbox"/>
CMO-306	Social Media: Information posted on one of the city's official social media accounts (typically consists of copies of information and documentation available elsewhere)	30 days	Multi	<input type="checkbox"/>
CMO-307	Community Newspaper Articles	until no longer of historical value	paper	<input checked="" type="checkbox"/>
CMO-308	Employee Recognition Program	10 years appraise for historical value	paper	<input type="checkbox"/>
CMO-309	Special Projects	until no longer of admin or historical value	Multi	<input checked="" type="checkbox"/>
CMO-310	City of Upper Arlington Graphic Standards	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-311	Community Surveys	10 years	Multi	<input type="checkbox"/>
CMO-312	State of the City Address	permanent	Multi	<input checked="" type="checkbox"/>
CMO-313	City Service Brochures	until no longer of administrative value	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY MANAGER'S OFFICE - ECONOMIC DEVELOPMENT**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
CMO-400	<b>Community Improvement Corporation (CIC) Agendas, Minutes, Annual Audit Reports, Director &amp; Officer Insurance Policies and Financials</b>	permanent	Multi	<input checked="" type="checkbox"/>
CMO-401	<b>Economic Development Fund</b> (approved projects and related documents)	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-402	<b>Enterprise Zone - Economic Development Activity Documents</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-403	<b>Municipal Electrical &amp; Natural Gas Aggregation</b> (operation, governance, oversight documents)	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-404	<b>Tax Increment Financing Reports</b>	5 years after completion of project, provided audited	Multi	<input type="checkbox"/>
CMO-405	<b>Central Ohio Public Energy Council</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-406	<b>Annual Reports - TIF, CRA, Enterprise</b>	25 years	Multi	<input checked="" type="checkbox"/>

**CITY OF UPPER ARLINGTON: CITY MANAGER'S OFFICE - INFORMATION TECHNOLOGY**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
CMO-500	<b>Data System Specifications</b>	3 years after discontinuance of system and until all system data is destroyed or transferred to new operating system	Multi	<input type="checkbox"/>
CMO-501	<b>Data Documentation/File Layout</b>	3 years after discontinuance of system and until all system data is destroyed or transferred to new operating system	Multi	<input type="checkbox"/>
CMO-502	<b>Data System - Hardware Documentation</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-503	<b>Data Processing Disaster Preparedness and Recovery Plans</b>	until superseded	Multi	<input type="checkbox"/>
CMO-504	<b>System Back-Up Files</b> (copies of master files or databases, application software, logs, directories, and other records needed to restore a system in case of a disaster or inadvertent destruction)	3 back-up cycles	Multi	<input type="checkbox"/>
CMO-505	<b>System Users Access Records</b>	until no longer of administrative value	Multi	<input type="checkbox"/>
CMO-506	<b>Site &amp; Equipment Support Files</b>	until warranty or guarantee of service has expired. Retain Service Histories and other Summary Records until no longer of administrative value	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: DEVELOPMENT DEPARTMENT**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
DEV-100	<b>Building, House Numbering, Street Address Records</b>	permanent	Multi	<input checked="" type="checkbox"/>
DEV-101	<b>Maps, Plans, Plots &amp; Renderings</b> (zoning, development, subdivision)	permanent	Multi	<input checked="" type="checkbox"/>

**CITY OF UPPER ARLINGTON: DEVELOPMENT DEPARTMENT - BUILDING DIVISION**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
DEV-200	<b>Building Permits- Residential</b> (records of approval process for new construction or alteration of residential dwellings, such as applications, permits, certificates of plan approval, completion and occupancy, notices and orders, inspection reports, fire suppression/protection and other records required by Residential Code of Ohio (RCO) and all miscellaneous correspondence and documents.)	RCO-required files: (includes Permit Application, Certificate of Plan Approval, Certificate of Occupancy, Notices and Orders for all applications submitted to the City) For life of structure  Non RCO-required: 7 years after date of certificate of occupancy issued	Multi	<input type="checkbox"/>
DEV-201	<b>Building Permits- Commercial</b> (records of approval process for new construction or alteration of 4+-family dwellings and commercial/public buildings, such as applications, permits, certificates of plan approval, completion and occupancy, zoning certificates, notices and orders, fire suppression/protection and other records required by Ohio Building Code (OBC) and all miscellaneous correspondence and documents.)	OBC-required records: (including all Permit Applications, Certificate of Plan Approval, Certificate of Occupancy, Notices and Orders, Zoning Certificate): Permanent) For life of structure  Non OBC-required records: 7 years after date of certificate of occupancy	Multi	<input type="checkbox"/>
DEV-202	<b>Permits (Other Than Building)</b>	7 years	Multi	<input type="checkbox"/>
DEV-203	<b>Contractor Registration</b> (Includes applications, insurance, and all related documents)	2 years after expiration of license	Multi	<input type="checkbox"/>
DEV-204	<b>Inspection Records</b> (logs and reports of inspections made for construction, plumbing, or electrical work)	7 years	Multi	<input type="checkbox"/>
DEV-205	<b>Board of Building Appeals</b> (agendas, minutes & packets)	Permanent	Multi	<input checked="" type="checkbox"/>

**CITY OF UPPER ARLINGTON: DEVELOPMENT DEPARTMENT - BUILDING DIVISION**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
DEV-206	<p><b>COMMERCIAL CONSTRUCTION DOCUMENTS</b>                      (does not include permits, records used in new construction of multi-family dwellings and commercial and public buildings, such as approved drawings, spec books/project manuals, inspection reports and all miscellaneous correspondence and documents.)</p>	<p><b>Project completed:</b> original building, alterations, and tenant buildout documents are kept 7 full calendar years from the date of final approved inspection.  <b>Project not built, but plans approved:</b> retain 3 years after year plans approved  <b>Project not built and plans NOT approved:</b> retain until no activity for 1 calendar year or until expiration of permit application  <b>Documents superseded:</b> retain until project completed  <b>Project superseded:</b> retain until certificate of occupancy for new project is issued</p>	Multi	<input type="checkbox"/>
DEV-207	<p><b>RESIDENTIAL CONSTRUCTION DOCUMENTS</b>                      (does not include permits, records used in new construction of residential dwellings, such as approved drawings, spec books/project manuals, inspection reports and all miscellaneous correspondence and documents.)</p>	7 years after date of certificate of occupancy issued	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: DEVELOPMENT DEPARTMENT - CODE COMPLIANCE**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
DEV-300	<b>Code Compliance Case Files</b> (violations resulting in Court / Abatement actions, violations with no court actions)	5 years	Multi	<input type="checkbox"/>
DEV-301	<b>Code Compliance Case Files</b> (unsubstantiated violation claims)	3 years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: DEVELOPMENT DEPARTMENT - PLANNING & ZONING DIVISION**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
DEV-400	<b>Board of Planning &amp; Zoning</b> (Meeting Agendas & Minutes, Variance, Conditional, Sign Requests, Appeals)	permanent	Multi	<input checked="" type="checkbox"/>
DEV-401	<b>Board of Planning &amp; Zoning Agenda Packets</b>	25 years	Multi	<input type="checkbox"/>
DEV-402	<b>Case Files</b>	permanent	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT**

**APPROVED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-100	<b>Certificates of Estimated Revenues</b>	7 years	Multi	<input type="checkbox"/>
FIN-101	<b>Annual Municipal Financial Report (CAFR)</b>	permanent	Multi	<input checked="" type="checkbox"/>
FIN-102	<b>Tax Settlement and Distribution Reports, County Auditor</b>	permanent	Multi	<input type="checkbox"/>
FIN-103	<b>Monthly Financial Reports</b>	until incorporated in annual report	Multi	<input type="checkbox"/>
FIN-104	<b>Contracts, Agreements, and Leases</b>	15 years after expiration	Multi	<input type="checkbox"/>
FIN-105	<b>Assessments and Special Assessments</b>	5 years after issue is paid, provided audited	Multi	<input type="checkbox"/>
FIN-106	<b>Inventory of Fixed Assets</b> (General and Enterprise)	permanent audit documentation	Multi	<input type="checkbox"/>
FIN-10	<b>Utility Bills</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-108	<b>Accounts Ledger</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-109	<b>Accounts Payable Records</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-110	<b>Accounts Receivable Ledger- General</b>	permanent	Multi	<input type="checkbox"/>
FIN-111	<b>Audit Documentation Records</b>	permanent	Multi	<input type="checkbox"/>
FIN-112	<b>Bad Checks</b>	2 years after payment or settled	Multi	<input type="checkbox"/>
FIN-113	<b>Bank Records</b> (receipts, reconciliation, slips, statements, etc.)	3 years provided audited	Multi	<input type="checkbox"/>
FIN-114	<b>Cancelled Checks</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-115	<b>Investment Records</b>	permanent	Multi	<input type="checkbox"/>
FIN-116	<b>Journal Entries</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-117	<b>Receipts</b> (cash receipts, inter-governmental tax receipts, etc.)	3 years provided audited	Multi	<input type="checkbox"/>
FIN-118	<b>Vouchers (original)</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-119	<b>Union &amp; Labor Contracts &amp; Agreements</b> (includes modifications and addendum)	15 years after expiration of labor contract or agreement	Multi	<input type="checkbox"/>
FIN-120	<b>Employee Time Sheets</b>	10 years provided audited	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT**

**APPROVED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-121	<b>W-2 Forms and Annual Summary Reports</b>	10 years	Multi	<input type="checkbox"/>
FIN-122	<b>State Income Tax Reports</b>	10 years	Multi	<input type="checkbox"/>
FIN-123	<b>Local Income Tax Reports</b>	10 years	Multi	<input type="checkbox"/>
FIN-124	<b>Federal Tax Reports and Filings (941)</b>	10 years provided audited	Multi	<input type="checkbox"/>
FIN-125	<b>Bureau of Employment Services Report</b>	7 years provided audited	Multi	<input type="checkbox"/>
FIN-126	<b>Payroll Journal Year End Summary</b>	50 years	Multi	<input type="checkbox"/>
FIN-127	<b>Payroll Journal Bi-weekly Report</b>	7 years provided audited	Multi	<input type="checkbox"/>
FIN-128	<b>Employee Leave Balance Reports Per pay/YTD</b>	3 years	Multi	<input type="checkbox"/>
FIN-129	<b>Payroll Deduction Reports</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-130	<b>1099 Forms</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-131	<b>Retirement System Reports</b>	permanent	Multi	<input type="checkbox"/>
FIN-132	<b>Insurance Reports</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-133	<b>Bureau of Workers Compensation Rating Sheets &amp; Premium Reports</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-134	<b>City Budgets (Adopted)</b>	permanent	Multi	<input checked="" type="checkbox"/>
FIN-135	<b>Landfill Records &amp; Logs</b> (weight slips and charges)	3 years provided audited	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT - PURCHASING**  
**APPROVED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-200	<b>Requisitions / Purchase Orders</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-201	<b>Bids - Unsuccessful</b>	2 years after awarding contract, provided audited	Multi	<input type="checkbox"/>
FIN-202	<b>Personal or Professional Service Contracts</b>	3 years after contract completed	Multi	<input type="checkbox"/>
FIN-203	<b>Certified Payroll for Construction Projects</b>	15 years after completion of project, provided audited	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT - DEBT ISSUES**  
**APPROVED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-300	<b>Bond Issue Ledger</b>	permanent	Multi	<input checked="" type="checkbox"/>
FIN-301	<b>Bond Transcripts</b>	10 years after issue is redeemed	Multi	<input type="checkbox"/>
FIN-302	<b>Bonds Redeemed</b>	3 years after issue is redeemed	Multi	<input type="checkbox"/>
FIN-303	<b>Call Notices - Securities</b>	10 years after call	Multi	<input type="checkbox"/>
FIN-304	<b>Sinking Fund Ledger or Journal</b>	permanent	Multi	<input checked="" type="checkbox"/>
FIN-305	<b>Coupons (Redeemed)</b>	4 years provided audited	Multi	<input type="checkbox"/>
FIN-306	<b>Electronic Funds Transfer Records</b>	3 years provided audited	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: FINANCE DEPARTMENT - INCOME TAX DEPARTMENT**

**APPROVED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
FIN-400	<b>Monthly Cash Receipts</b>	3 years provided audited	Multi	<input type="checkbox"/>
FIN-401	<b>Delinquent Taxpayer Lists</b>	3 years provided audited	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: FIRE DIVISION**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
FD-100	<b>Annual Reports</b>	25 years	Multi	<input checked="" type="checkbox"/>	
FD-101	<b>Video Tapes - In Car Video System</b>	6 months	Multi	<input type="checkbox"/>	
FD-102	<b>Annual Division Budget Preparation</b> (documents and worksheets)	until incorporated into the budget	Multi	<input type="checkbox"/>	
FD-103	<b>Monthly Reports</b>	until incorporated into annual report	Multi	<input type="checkbox"/>	
FD-104	<b>Standard Operating Procedures</b>	permanent	Multi	<input type="checkbox"/>	
FD-105	<b>NFIRS Incident Reports</b> (fire, carbon monoxide tests, smoke detector inspection)	10 years	Multi	<input type="checkbox"/>	
FD-106	<b>Fire Investigation Reports - Non-fatalities</b>	20 years	Multi	<input type="checkbox"/>	
FD-107	<b>EMS Incident Reports</b> (includes HIPAA acknowledgment)	25 years	Multi	<input type="checkbox"/>	
FD-108	<b>EMS Controlled Substance Inventory</b> (includes sealed and resealed, WMD and drug locker)	4 years	paper	<input type="checkbox"/>	
FD-109	<b>EMS Equipment Maintenance and Calibration Inspection Log</b>	4 years	Multi	<input type="checkbox"/>	
FD-110	<b>EMS/Physician Quality Assurance Program Records</b>	4 years	Multi	<input type="checkbox"/>	
FD-111	<b>Fire Investigation Reports - Fatalities</b>	permanent	Multi	<input type="checkbox"/>	
FD-112	<b>Fire Permit Inspection- Commercial Structures</b>	life of structure	Multi	<input type="checkbox"/>	
FD-113	<b>Home Fires Inspection</b> (residential structures)	3 years after violation corrected and no legal actions pending	Multi	<input type="checkbox"/>	
FD-114	<b>Routine Annual Commercial Fire Inspections</b>	3 years after violation corrected and no legal actions pending	Multi	<input type="checkbox"/>	
FD-115	<b>Knox Box Address Lists</b>	until revised, superseded or obsolete	Multi	<input type="checkbox"/>	
FD-116	<b>Hose Testing Records</b>	10 years	Multi	<input type="checkbox"/>	
FD-117	<b>Ladder Testing Records</b> (ground, aerial)	10 years	paper	<input type="checkbox"/>	
FD-118	<b>SCBA Fit Testing Records</b>	permanent	Multi	<input type="checkbox"/>	
FD-119	<b>Daily Equipment Inspection Records</b>	10 years	paper multi	<input type="checkbox"/>	now keeping these records digital

**CITY OF UPPER ARLINGTON: FIRE DIVISION**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
FD-120	<b>Hazardous Exposure Reports</b>	permanent	Multi	<input type="checkbox"/>	
FD-121	<b>Hydrant Location Maps</b>	until revised, superseded or obsolete	Multi	<input type="checkbox"/>	
FD-122	<b>Permits for Fire/Fireworks/Service Station Operations/Open Burning/Hydrant Usage/Tents</b>	1 year after expiration	paper	<input type="checkbox"/>	
FD-123	<b>Equipment Maintenance and Repair Records</b>	life of equipment	<del>paper</del> multi	<input type="checkbox"/>	now keeping these records digital
FD-124	<b>Above and Underground Storage Tank Records</b>	10 years	Multi	<input type="checkbox"/>	
FD-125	<b>Mutual Aid Agreements</b>	until superseded	paper	<input type="checkbox"/>	
FD-126	<b>ISO Rating Inspections</b>	50 years	paper	<input type="checkbox"/>	
FD-127	<b>Emergency Response and Preplanned Protocols</b>	2 years	Multi	<input type="checkbox"/>	
FD-128	<b>DEA/Ohio Board of Pharmacy Licenses</b>	6 years after expiration	paper	<input type="checkbox"/>	
FD-129	<b>Work Schedules and Duty Crew Logs</b>	4 years	Multi	<input type="checkbox"/>	
FD-130	<b>CARES Client Participation Files</b> (including waivers, HIPPA protected info, personal health info, non-medical data and other CARES participant documents)	7 years from last contact or 2 years from notice of death of participant	Multi	<input type="checkbox"/>	
FD-131	<b>CAD Update Forms for NRECC</b>	until revised, updated, superseded or no longer of admin value	Multi	<input type="checkbox"/>	
FD-132	<b>Fire Inspector Logs</b>	3 years	Multi	<input type="checkbox"/>	
FD-133	<b>Educational Fire Drill Reports</b>	Incorporate into appropriate commercial building files and maintain for life of structure permanent	Multi	<input type="checkbox"/>	
FD-134	<b>Training/Travel Requests</b>	permanent	Multi	<input type="checkbox"/>	
FD-135	<b>Installation Waivers</b> (including for the installation of Knox Boxes, shower rails, smoke detectors and other similar installed items)	6 years and no pending claims	Multi	<input type="checkbox"/>	
FD-136	<b>Training Attendance Reports</b> (can be audited by State Public Safety up to 5 years)	5 years	paper	<input type="checkbox"/>	
FD-137	<b>Unusual Occurrence Reports</b>	5 years	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: FIRE DIVISION**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
FD-138	<b>Acquired Structure Records</b>	permanent	Multi	<input type="checkbox"/>	
FD-139	<b>Juvenile Fire Setter Intervention Records</b>	4 years after juvenile turns 18 years old	Multi	<input type="checkbox"/>	
FD-140	<b>Loan Slips- Equipment</b>	until equipment returned and no claims pending	paper	<input type="checkbox"/>	
FD-141	<b>Liability Waivers- Adults</b>	6 years	Multi	<input type="checkbox"/>	
FD-142	<b>Liability Waivers- Minors</b>	15 years or until the minor turns 18 years old	Multi	<input type="checkbox"/>	
FD-143	<b>Service Request Forms</b>	1 year	Multi	<input type="checkbox"/>	
FD-144	<b>Homeland Security Emergency Management Plan</b>	until obsolete or superseded	paper	<input type="checkbox"/>	
FD-145	<b>Fire Background Investigations for Prospective Division Employee, Individuals NOT Hired by City</b>	7 years	Multi	<input type="checkbox"/>	
FD-146	<b>Fire Background Investigations for Prospective Division Employee, Individuals Hired by City</b>	permanent	Multi	<input type="checkbox"/>	
FD-147	<b>Medical Advisory Board</b> (Meeting Minutes, Agendas, Correspondence)	permanent	Multi	<input type="checkbox"/>	
FD-148	<b>Drug Administration Signature Forms</b>	3 years	Multi	<input type="checkbox"/>	

# CITY OF UPPER ARLINGTON: MAYOR'S COURT - CLERK OF COURTS

## PROPOSED RETENTION SCHEDULE (RC-2)

*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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes2
MC-100	<b>Ohio Supreme Court Quarterly Report</b>	permanent	Multi	<input checked="" type="checkbox"/>	
MC-101	<b>Annual Budget Preparations</b> (Documents, Exhibits and Worksheets)	until no longer of an administrative value	Multi	<input type="checkbox"/>	
MC-102	<b>Administrative Rules for the Court</b>	6 Years After Revised or Rescinded	Multi	<input type="checkbox"/>	
MC-103	<b>Mayor's Court Annual Report</b>	permanent	Multi	<input checked="" type="checkbox"/>	
MC-104	<b>Case Files- Criminal (M1-M4) includes warrant, warrant block, release of warrant block</b>	50 Years	Multi	<input type="checkbox"/>	
MC-105	<b>Case Files- Traffic (M1-M4) includes warrant, forfeiture or release of forfeiture</b>	25 Years	paper	<input type="checkbox"/>	
MC-106	<b>Case Files- Criminal (MM) includes warrant, warrant block, release of warrant block</b>	5 Years	Multi	<input type="checkbox"/>	
MC-107	<b>Case Files- Traffic (MM) includes warrant, forfeiture or release of forfeiture</b>	5 Years	Multi	<input type="checkbox"/>	
MC-108	<b>Case Files- OVI (Traffic) includes warrant, forfeiture or release of forfeiture</b>	50 Years	Multi	<input type="checkbox"/>	
MC-109	<b>Weekly Docket</b>	Until No Longer of Legal Value, then Destroy	Multi	<input type="checkbox"/>	
MC-110	<b>Court Directed Expungements</b>	Manage record in accordance with Court Order	Multi	<input type="checkbox"/>	
MC-111	<b>Monthly Reconciliation Report to City Council</b>	10 Years	Multi	<input type="checkbox"/>	
MC-112	<b>BMV- Abstract of Convictions by Case</b>	7 Years After Case Closed	Multi	<input type="checkbox"/>	
MC-113	<b>Ohio Treasurer of State- State Reparations Fees</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-114	<b>Kiosk Report</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-115	<b>Bond Refund Report- Monthly</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-116	<b>Cash Books- Detailed Report- Monthly</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-117	<b>Receipts Reconciliation Sheet- Daily</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-118	<b>Bank Balance versus Bonds Held- Monthly</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-119	<b>Payment Schedule Report/ Monthly Owe- Annual</b>	3 years provided audited	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: MAYOR'S COURT - CLERK OF COURTS**

**PROPOSED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes2
MC-120	<b>Delinquent Payment Report- Annual</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-121	<b>Yearly Court Docket</b>	permanent	Multi	<input checked="" type="checkbox"/>	
MC-122	<b>Index to Court Cases</b>	permanent		<input checked="" type="checkbox"/>	
MC-123	<b>Checking Account- Voided Checks, Deposit Slips, and Reconciliation</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-124	<b>Parking Tickets</b> <del>Paid, Closed or Voided</del>	<del>3 years provided audited</del> retain until the ticket is paid and audited	Multi	<input type="checkbox"/>	to align with the Rules of Superintendence for the Courts of Ohio
MC-125	<b>Bond Schedule and Fee Schedule (Administrative Rules for Court)</b>	3 years provided Audited	Multi	<input type="checkbox"/>	
MC-126	<b>Bond Forfeiture Report- Monthly</b>	3 years provided audited	Multi	<input type="checkbox"/>	
MC-127	<b>Daily Payment Logs</b>	3 years provided audited	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: PARKS & RECREATION DEPARTMENT**  
**APPROVED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PR-100	<b>Parks and Recreation Facilities and Equipment Files</b>	Maintain for the Life of the Equipment	Multi	<input type="checkbox"/>
PR-101	<b>Emergency Management Plan</b>	Until Superseded	Multi	<input type="checkbox"/>
PR-102	<b>Special Projects Task Force (Agendas &amp; Minutes)</b>	10 Years and appraise for Historical Value	Multi	<input checked="" type="checkbox"/>
PR-103	<b>Rental Records</b>	3 Years provided Audited	Multi	<input type="checkbox"/>
PR-104	<b>Program Reference Books</b>	Until No Longer of an Admin. Value	Multi	<input type="checkbox"/>
PR-105	<b>Recreational Programming Files</b>	2 Years	Multi	<input type="checkbox"/>
PR-106	<b>Vendor Information Files</b>	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>
PR-107	<b>Community Surveys</b>	5 Years	Multi	<input type="checkbox"/>
PR-108	<b>Public Education Programs</b>	Until No Longer of Admin. Value	Multi	<input type="checkbox"/>
PR-109	<b>Annual Reports</b>	until incorporated into City Annual Report	Multi	<input type="checkbox"/>
PR-110	<b>Team Rosters and Scorebooks</b>	1 Year	Multi	<input type="checkbox"/>
PR-111	<b>Tennis Memberships</b>	4 Years	Multi	<input type="checkbox"/>
PR-112	<b>Receipts/ Program Costs</b>	3 Years provided Audited	Multi	<input type="checkbox"/>
PR-113	<b>Participant Survey</b>	1 Year	Multi	<input type="checkbox"/>
PR-114	<b>Liability Waivers (Adults)</b>	6 Years	Multi	<input type="checkbox"/>
PR-115	<b>Liability Waivers (Minors)</b>	15 Years or Until Minor Turns 18	Multi	<input type="checkbox"/>
PR-116	<b>Parks &amp; Recreation Strategic Plan</b>	Permanent	Multi	<input checked="" type="checkbox"/>

**CITY OF UPPER ARLINGTON: PARKS & RECREATION DEPARTMENT - AQUATICS**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PR-200	Swimming Pool Operations- Daily Records (Pool Chemistry, Maintenance and General Operations)	4 Years	Multi	<input type="checkbox"/>
PR-201	Swimming Pool Operations- Incident Reports (Records all rescues and assists in water, first aid incidents and discipline incidents)	4 Years	Multi	<input type="checkbox"/>
PR-202	Swimming Pool Operations- Practice Logs (Life Saving, First aid and Endurance Testing)	4 Years	Multi	<input type="checkbox"/>
PR-203	Swimming Pool Operations- Facility and Health Inspections	4 Years	Multi	<input type="checkbox"/>
PR-204	Swimming Pool Operations- Maintenance Requests	4 Years	Multi	<input type="checkbox"/>
PR-205	Swimming Pool Operations- Pool Memberships	4 Years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: PARKS & RECREATION DEPARTMENT - SENIOR CITIZEN'S CENTER**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PR-300	Senior Citizen Program Files	2 Years	Multi	<input type="checkbox"/>
PR-301	Senior Citizen's Newsletter	5 Years	Multi	<input type="checkbox"/>
PR-302	Senior Citizen's Center Maintenance Records	7 Years	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: PARKS & RECREATION DEPARTMENT - CULTURAL ARTS**  
**APPROVED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PR-400	<b>Cultural Arts Exhibits - Applications and Gallery Guide</b>	Until Superseded	Multi	<input type="checkbox"/>
PR-401	<b>Cultural Arts Festival and Event Applications for Participation and Vendors</b>	2 Years	Multi	<input type="checkbox"/>
PR-402	<b>Cultural Arts Professional Associations/ Development</b>	2 Years	Multi	<input type="checkbox"/>
PR-403	<b>Performing Arts seasonal schedule of performers</b>	3 years	Multi	<input type="checkbox"/>
PR-404	<b>Cultural Arts Public and Community Relations (Upper Arlington Arts)</b>	2 Years	Multi	<input type="checkbox"/>
PR-405	<b>Cultural Arts Resource Materials- Brochures, Catalogs, Directories, Handbooks, etc.</b>	Until Superseded	Multi	<input type="checkbox"/>
PR-406	<b>Artist and Vendor Contracts for Exhibitions and Event</b>	3 Years Provided Audited	Multi	<input type="checkbox"/>
PR-407	<b>Arts and Culture Master Plan</b>	Current year plus prior version	Multi	<input type="checkbox"/>
PR-408	<b>Cultural Arts Annual Report</b>	5 years or no longer of Administrative Value	Multi	<input checked="" type="checkbox"/>
PR-409	<b>Cultural Arts Annual Work Plan</b>	3 years and no longer of administrative value	Multi	<input type="checkbox"/>
PR-410	<b>Art Collection – Inventory &amp; Maintenance Plan</b>	Until Superseded and No Longer of Administrative Value	Multi	<input type="checkbox"/>
PR-411	<b>Art Collection – Acquisition Records</b>	As long as artwork owned	Multi	<input type="checkbox"/>
PR-412	<b>Art Collection – Deaccession Records</b>	5 years and no longer of administrative or historical value	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: PARKS & RECREATION DEPARTMENT - FORESTRY**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PR-500	<b>Public Tree Work Permits</b>	3 Years	Multi	<input type="checkbox"/>
PR-501	<b>Project Files</b>	10 Years After Project Completed	Multi	<input checked="" type="checkbox"/>
PR-502	<b>Mowing Log (Private Property)</b>	2 Years	Multi	<input type="checkbox"/>
PR-503	<b>Residential Notifications</b>	2 Years	Multi	<input type="checkbox"/>
PR-504	<b>Pesticide Application Records</b>	6 Years provided All Claims Settled	Multi	<input type="checkbox"/>
PR-505	<b>Inspection Orders and Work Orders</b>	4 Years	Multi	<input type="checkbox"/>
PR-506	<b>Facility Files (Playgrounds, Installation, Maintenance and Inspection, Copies of Plans &amp; Drawings)</b>	6 Year(s) After Life of Equipment/ Facility and No Claims Pending	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: PARKS & RECREATION DEPARTMENT - CAPITAL PROJECTS**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 2/23/2022 | OHC APPROVED: 4/20/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
PR-600	<b>Capital Projects Plans and Spec</b>	25 Years	Multi	<input type="checkbox"/>
PR-601	<b>Exhibits, Plans, Drawings, etc. (Projects not Approved)</b>	Until No Longer of an Administrative value	Multi	<input type="checkbox"/>
PR-602	<b>Statement of Qualifications</b>	Until No Longer of an Administrative value	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: POLICE DEPARTMENT**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
(renumber all) PD-100	<b>Annual Reports</b>	permanent	Multi	<input checked="" type="checkbox"/>	
PD-101	<b>Annual Budget Preparations/Materials</b>	5 years	Multi	<input type="checkbox"/>	
PD-102	<b>Monthly Reports (monthly report to City Manager, UCR, etc.)</b>	2 years incorporate into annual report	Multi	<input type="checkbox"/>	
PD-103	<b>Accreditation Reports (CALEA)/ Compliance/ ISSR Files</b>	8 years After most recent on site reaccreditation inspection (CALEA)	Multi	<input type="checkbox"/>	
PD-104	<b>Bias Based Patterns Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-105	<b>Use of Force Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-106	<b>Use of Force Review Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-107	<b>Review of Use of Force Policy/ Weapons Proficiency Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-108	<b>Use of Force Analysis</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-109	<b>Review of Program- SRO/DARE Contracts</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-110	<b>Organizational Chart</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-111	<b>Goals and Objectives</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-112	<b>Progress Towards Goals and Objectives</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-113	<b>Crime Analysis</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-114	<b>Position Management</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-115	<b>Workload Assessment</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-116	<b>Review of Specialized Assignments</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-117	<b>Budget Input</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-118	<b>Budget Status Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-119	<b>Fiscal Audits</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: POLICE DEPARTMENT  
PROPOSED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PD-120	<b>Analysis of Grievances</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-121	<b>Performance Evaluation (all personnel)</b>	maintained per HR Schedule	Multi	<input type="checkbox"/>	
PD-122	<b>Monthly Probationary Training Reviews</b>	Originals forwarded to UAPD Training Bureau and retained until probation completed	Multi	<input type="checkbox"/>	
PD-123	<b>Pursuit Evaluation Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-124	<b>Pursuit Analysis Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-125	<b>Review of Juvenile Programs Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-126	<b>Evaluation Effectiveness of Crime Prevention Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-127	<b>Community Relations Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-128	<b>Citizen Attitude Survey</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-129	<b>After Action Report- Natural or Man-Made Disaster</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-130	<b>After Accident Report- Hostage/ Barricade</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-131	<b>Operational Readiness of Equipment Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-132	<b>After Action Report- Special Events</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-133	<b>Analysis of Incident and Training Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-134	<b>Review of Intelligence Files Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-135	<b>Summary of Complaints Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-136	<b>Staff Inspection Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-137	<b>Victim/ Witness Assistance Needs Analysis Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-138	<b>Prisoner Escape Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-139	<b>Fire Equipment Inspection Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-140	<b>Fire Equipment Testing Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: POLICE DEPARTMENT  
PROPOSED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PD-141	<b>Fire Detection Inspection Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-142	<b>Fire Detection Testing Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-143	<b>Generator Testing Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-144	<b>Password Audit Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-145	<b>Crime/ Crash Scene Processing Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-146	<b>Property Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-147	<b>Inventory of Property Room Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-148	<b>Audit of Property Room Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-149	<b>Unannounced Inspection Report</b>	8 years after most reaccreditation cycle	Multi	<input type="checkbox"/>	
PD-150	<b>General Orders, Special Orders, Policies &amp; Procedures</b>	8 Years	Multi	<input type="checkbox"/>	
PD-151	<b>UCR, NIBRS and OBIRS Reports</b>	5 Years	Multi	<input type="checkbox"/>	
PD-152	<b>Special Duty Log</b>	Until incorporated into Summary Report, then Destroy	Multi	<input type="checkbox"/>	
PD-153	<b>Incident Reports</b>	6 Years and No Actions Pending	Multi	<input type="checkbox"/>	
PD-154	<b>Offense Reports and Investigative Case Files- Misdemeanors</b>	25 Years and No Actions Pending	Multi	<input type="checkbox"/>	
PD-155	<b>Offense Reports and Criminal Case Files – Felonies (except Homicide and Arson)</b>	25 Years and No Actions Pending	Multi	<input type="checkbox"/>	
PD-156	<b>Offense Reports and Criminal Case Files- Felonies (Homicide and Arson)</b>	permanent	Multi	<input type="checkbox"/>	
PD-157	<b>Motor Vehicle Accident Reports</b>	4 years	Multi	<input type="checkbox"/>	
PD-158	<b>Uniform Traffic Tickets and Officer Notes</b>	4 years	Multi	<input type="checkbox"/>	
PD-159	<b>Uniform Traffic Tickets- VOIDED</b>	3 Years Provided Audited	Multi	<input type="checkbox"/>	
PD-160	<b>Domestic Dispute Summary Reports (BCI &amp; I)</b>	2 years	Multi	<input type="checkbox"/>	
PD-161	<b>Civil Protection Orders &amp; Temporary Protection Orders</b>	Until Served, Discharged, Stale dated, Answered, or Withdrawn by the Issuing Court	Multi	<input type="checkbox"/>	
PD-162	<b>Vacation House Checks</b>	30 Days After Owner returns and date entered into CAD	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: POLICE DEPARTMENT**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PD-163	<b>CCH Logs/ Requests Forms</b>	3 Years Provided Audited	Multi	<input type="checkbox"/>	
PD-164	<b>LEADS/ NCIC Report Entries</b>	3 Years Provided Audited	Multi	<input type="checkbox"/>	
PD-165	<b>LEADS Validation Files, Audit Report &amp; Correspondence</b>	3 Years	Multi	<input type="checkbox"/>	
PD-166	<b>LEADS/ NCIN Teletypes</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	
PD-167	<b>Vehicle Impound and Towed Car Log</b>	3 Years	Multi	<input type="checkbox"/>	
PD-168	<b>Master Name Index</b>	permanent	Multi	<input checked="" type="checkbox"/>	
PD-169	<b>Mutual Aid Agreements</b>	15 years after expiration or modification and no claims pending	Multi	<input type="checkbox"/>	
PD-170	<b>Property Receipts</b>	3 Years Provided Audited	Multi	<input type="checkbox"/>	
PD-171	<b>Property Records/ RMS</b>	10 Years After Property Destroyed	Multi	<input type="checkbox"/>	
PD-172	<b>Abandoned or Junked Vehicle Affidavits and Files</b>	3 years	Multi	<input type="checkbox"/>	
PD-173	<b>Breathalyzer Records</b> (includes breath tests, calibration checks, proficiency tests, permits, certified copies of calibration solution, maintenance records for the instruments and simulators, etc.)	3 Years	Multi	<input type="checkbox"/>	
PD-174	<b>Fixed Asset Acquisition &amp; Disposition</b>	3 years after revised or superseded, provided audited	Multi	<input type="checkbox"/>	
PD-175	<b>Upper Arlington Commercial Establishments w/ Liquor Licenses</b>	Until, Revised, Superseded, or Obsolete	Multi	<input type="checkbox"/>	
PD-176	<b>State and Federal Grant Applications, Not Funded</b>	1 Years After Decision Rendered	Multi	<input type="checkbox"/>	
PD-177	<b>State and Federal Grants- Funded</b>	7 Years After expiration of Grant	Multi	<input type="checkbox"/>	
PD-178	<b>Audio &amp; Video Tapes- Criminal Investigations</b>	45 Days	Multi	<input type="checkbox"/>	
PD-179	<b>Police Auction File</b>	7 years	Multi	<input type="checkbox"/>	
PD-180	<b>Audio/Video Recordings - In Car and Body Worn Camera Video Systems</b>	55 Days	Multi	<input type="checkbox"/>	
PD-181	<del>Facility Monitoring Security Tapes</del> <del>Jail Video Recordings</del>	<del>90-Days</del> <del>1 year</del>	Multi	<input type="checkbox"/>	moving facility to GEN, adding jail videos as a new series
PD-182	<b>Emergency Special Response Protocol</b>	30 Days Until Revised, Superseded, or Discontinued	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: POLICE DEPARTMENT**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PD-183	<b>Expunged Records per Expungement Orders</b>	Destroy all files, records and computer references as directed by the court	Multi	<input type="checkbox"/>	
PD-184	<b>Jail Log</b>	8 Years After most recent on site reaccreditation inspection (CALEA)	Multi	<input type="checkbox"/>	
PD-185	<b>Case Report Logs</b>	3 years	computer	<input type="checkbox"/>	
PD-186	<b>Daily Activity Sheets</b>	2 years	Multi	<input type="checkbox"/>	
PD-187	<b>Alarm Drop Warning</b>	1 year	Multi	<input type="checkbox"/>	
PD-188	<b>Alarm Warning</b>	1 year	Multi	<input type="checkbox"/>	
PD-189	<b>Parking Tickets (Paid)</b>	3 Years Provided Audited	Multi	<input type="checkbox"/>	
PD-190	<b>Shift Assignment Roster</b>	until superseded	Multi	<input type="checkbox"/>	
PD-191	<b>Bicycle Reports- Found/ Recovered</b>	1 year	Multi	<input type="checkbox"/>	
PD-192	<b>Bicycle Reports- Stolen</b>	5 Years	Multi	<input type="checkbox"/>	
PD-193	<b>Arrest Files- Adult/ Juvenile Felony</b>	25 Year(s) After Last Entry	Multi	<input type="checkbox"/>	
PD-194	<b>Arrest Files- Adult Misdemeanor</b>	10 years	Multi	<input type="checkbox"/>	
PD-195	<b>Arrest Files- Juvenile Misdemeanor</b>	4 Year(s) After Offender turns 18 years of age	Multi	<input type="checkbox"/>	
PD-196	<b>Animal Control Records</b>	3 Years	Multi	<input type="checkbox"/>	
PD-197	<b>Alarm Permits (Issued to Homeowners)</b>	Until change of home ownership or until alarm system is discontinued	Multi	<input type="checkbox"/>	
PD-198	<b>Alarm Data Sheets- Police Emergency Reports</b>	2 years	Multi	<input type="checkbox"/>	
PD-199	<b>Informant Information Reports/ Funds</b>	3 years after most recent on site reaccreditation inspection (CALEA)	Multi	<input type="checkbox"/>	
PD-200	<b>Radio, 9-1-1, Dispatcher Telephone, and Automatically-recorded phone line recordings</b>	90 days	Multi	<input type="checkbox"/>	
PD-201	<b>D.A.R.E.- Safety Town Program Materials</b>	until superseded	Multi	<input type="checkbox"/>	
PD-202	<b>Dispatched CAD Information</b>	15 years	Multi	<input type="checkbox"/>	
PD-203	<b>Equipment Failure Report</b>	1 year	Multi	<input type="checkbox"/>	
PD-204	<b>Equipment Sign Out Records</b>	1 year	Multi	<input type="checkbox"/>	
PD-205	<b>Forfeiture Program Material- Federal/State</b>	5 years	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: POLICE DEPARTMENT**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

*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.*

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PD-206	<b>Police Desk/ Records Service Fund</b>	3 Years Provided Audited	Multi	<input type="checkbox"/>	
PD-207	<b>Radar Calibrations and Service Records</b>	until equipment is out of service	Multi	<input type="checkbox"/>	
PD-208	<b>Assignments- Dispatch Equipment &amp; Teamwork</b>	until equipment is out of service	Multi	<input type="checkbox"/>	
PD-209	<b>Liability Waivers (Adults)- Rider Waiver Records</b>	Adults- 3 years	Multi	<input type="checkbox"/>	
	<b>Liability Waivers (Minors) - Rider Waiver Records</b>	Minors- 5 years			
PD-210	<b>Parking Warning Sticker</b>	upon issuance	Multi	<input type="checkbox"/>	
PD-211	<b>IA Investigative Files</b>	permanent	Multi	<input type="checkbox"/>	
PD-212	<b>Police background investigations for prospective division employee, individuals not selected or not hired</b>	7 years	Multi	<input type="checkbox"/>	
PD-213	<b>Police background investigations for prospective division employee, individuals hired by City</b>	permanent	Multi	<input type="checkbox"/>	
PD-214	<b>Warrants</b>	30 days after served, withdrawn, recalled, or otherwise discharged	Multi	<input type="checkbox"/>	
PD-215	<b>Interview Recordings</b>	TBD	digital	<input type="checkbox"/>	newly accounted for series, need to discuss appropriate retention period

**CITY OF UPPER ARLINGTON: EMPLOYEE PERSONNEL FILE - GENERAL**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
HR-100	<b>Applications for Employment- Hired</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-101	<b>Resumes &amp; Letters of Reference- Hired.</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-102	<b>Background Investigations- Hired</b>	6 months after employee passes probationary period.	Multi	<input type="checkbox"/>	
HR-103	<b>Polygraph Examination &amp; Voice Stress Analysis- Hired (Employment Related)</b>	6 months after employee passes probationary period	Multi	<input type="checkbox"/>	
HR-104	<b>Controlled Substance Testing</b>	Place with Employee Drug and Alcohol Testing Results	Multi	<input type="checkbox"/>	
HR-105	<b>Occupational Health Examination- Hired</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-106	<b>Psychological Examinations- Hired</b>	6 months after employee passes probationary period	Multi	<input type="checkbox"/>	
HR-107	<b>Conditional Offer of Employment- Hired</b>	Place in Active Employee File	Multi	<input type="checkbox"/>	
HR-108	<b>Letters of Appointment</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-109	<b>Oaths of Office for City Staff &amp; City Council</b>	Place in Active Employee Personnel File Permanently	Multi	<input type="checkbox"/>	
HR-110	<b>Photographs &amp; Fingerprints</b>	Place in Active Employee Personnel File- continuously updated	Multi	<input type="checkbox"/>	
HR-111	<b>Employee Merit Evaluations</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-112	<b>Employee Personnel Actions- Commendations, Discipline, Pay Adjustments, Promotions, Demotions, etc.</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-113	<b>Letters of Appreciation and Commendation</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-114	<b>Complaints of Employee Misconduct</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-115	<b>Employee Pre-disciplinary Hearing Case Files</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: EMPLOYEE PERSONNEL FILE - GENERAL**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
HR-116	<b>Employee Grievances/ Arbitration &amp; Mediation Case Files and Reports</b>	5 Years After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>	
HR-117	<b>Training- Employee Training Records (May be summarized annually)</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-118	<b>Training- In Service Examinations, Score Sheets, Evaluations, etc. (Documents may be summarized annually)</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-119	<b>Employee Insurance Enrollment &amp; Change Records</b>	Continually Updated until Employee leaves municipal employment and then Purge from Personnel File	Multi	<input type="checkbox"/>	
HR-120	<b>Employee Bureau of Worker Compensation Claim File</b>	Place in Employee BWC File and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-121	<b>Employee Accident Reports</b>	Place in Active Employee Personnel File	Multi	<input type="checkbox"/>	
HR-122	<b>Department of Transportation- CDL Substance Abuse Files &amp; Testing Results</b>	Place with employee Drug and Alcohol Testing results and maintain Permanently	Multi	<input type="checkbox"/>	
HR-123	<b>Employee Drug Testing Results (Probable Cause)</b>	Place with Employee Drug and Alcohol Testing Results Files and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-124	<b>Family Medical Leave Act- Requests for Leave, Medical Certification, Continuation of Health Care Insurance &amp; Related Correspondences</b>	Place in Employee Medical File and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-125	<b>Employee Data Sheets- (FSLA Compliance) Annual Updates- To include full name or identifying number, complete home address, date of birth, gender and occupation, date of hire, date of separation</b>	Continually Updated Until Employee Leaves Municipal Employment and then Final Copy to Remain in Permanent Employee File	Multi	<input type="checkbox"/>	
HR-126	<b>Employee Status Forms- Retirement, Resignation, Dismissal, Termination, Absence, Request to Employer for Separation Information</b>	Place in Employee Personnel File and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-127	<b>Medical Benefits/ Claims</b>	Place in Employee Medical File and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-128	<b>Employee Wage Garnishment Orders/ Court Orders for Payroll Deductions</b>	3 Year(S) After Expiration or Cancellation of Order then Purged upon Employee Termination	Multi	<input type="checkbox"/>	
HR-129	<b>Employee Unemployment Compensation Case Files</b>	Place in Employee Personnel File and Maintain Permanently	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: EMPLOYEE PERSONNEL FILE - GENERAL**  
**PROPOSED RETENTION SCHEDULE (RC-2)**

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
HR-130	<b>I-9 Forms (Completed) Immigration Reform &amp; Control Act</b>	Purge 3 Years After Hiring Date or 1 year After Termination, whichever is a longer period of time	Multi	<input type="checkbox"/>	
HR-131	<b>COBRA (The Consolidated Budget Reconciliation Act of 1986)- Notice &amp; Election when qualifying event occurs</b>	Place in Employee Personnel File and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-132	<b>Copy of Social Security Card/ Driver's License</b>	Place in Employee Personnel File- Continuously Updated	Multi	<input type="checkbox"/>	
HR-133	<b>Verification of Employment</b>	Place in Employee Personnel File and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-134	<b>Employee Written Complaints</b>	Place in Employee Personnel File and Maintain Permanently	Multi	<input type="checkbox"/>	
HR-135	<b>Flexible Spending Application</b>	Continually Update Until the employee leaves municipal employment	Multi	<input type="checkbox"/>	
HR-136	<b>NeoGov Journal Entries</b>	until no longer of administrative value	Multi	<input type="checkbox"/>	need to account for these entries

**CITY OF UPPER ARLINGTON: EMPLOYEE PERSONNEL FILE - ACTIVE**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 5/20/2021 | OHC APPROVED: 6/1/2021

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
HR-200	<b>Employee State &amp; School District Income Tax Withholding Certificate</b>	Continually Updated until employee leaves municipal employment and then Final Copy to Remain in Archive Employee File	Multi	<input type="checkbox"/>
HR-201	<b>W-4 Forms</b>	Continually Updated until employee leaves municipal employment and then Final Copy to Remain in Archive Employee File	Multi	<input type="checkbox"/>
HR-202	<b>State &amp; Federal Retirement Systems- Applications, Payments, Waivers, Requests for Refunds, Application for Disability Funds, Acknowledgement of Non-Contributing Status, Applications to Purchase Military Credit &amp; related Documentation</b>	Place in Employee Personnel File in Finance and Maintain Permanently	Multi	<input type="checkbox"/>
HR-203	<b>Union Dues Deduction Form</b>	Place in Employee Personnel File in Finance and Maintain until separation	Multi	<input type="checkbox"/>
HR-204	<b>Requests, Authorization &amp; Cancellation of Payroll Deduction (Charity Credit Union, Savings Bonds, Deferred Compensation, etc.)</b>	Continually Updated until Employee Leaves Municipal Employment and Then Purge from Permanent File	Multi	<input type="checkbox"/>
HR-205	<b>Personnel Action Form/ Payroll Adjustment Justification</b>	Place in Employee Personnel File and Maintain Permanently	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: HUMAN RESOURCES**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 5/20/2021 | OHC APPROVED: 6/1/2021

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
HR-301	<b>Recruitment Files-</b> Includes public/employment announcement for open positions, job description, applications and related documents (examination materials and scores, background investigations, polygraph tests, interview notes for all candidates, references, occupational health and psychological examination), and conditional offers of employment.	7 Year(s)	Multi	<input type="checkbox"/>
HR-302	<b>Civil Service Commission-</b> Eligibility Lists	5 Year(s) worth of changes to list	Multi	<input type="checkbox"/>
HR-303	<b>Employee Classification Descriptions</b>	5 Year(s) After Superseded	Multi	<input type="checkbox"/>
HR-304	<b>Employee Job Descriptions</b>	5 Year(s) After Superseded	Multi	<input type="checkbox"/>
HR-305	<b>Active Personnel File: Includes the following materials:</b> <ul style="list-style-type: none"> <li>● Applications and pre-employment paperwork (including conditional offer of employment, letters of appointment, and oath of office)</li> <li>● Counseling, Discipline, and Incident Notices</li> <li>● Evaluations</li> <li>● Insurance/benefit enrollment &amp; change records</li> <li>● Personnel Action Forms noting pay or status changes</li> <li>● Training and Certifications required for the position held</li> <li>● Use of Force Reports</li> <li>● Verification of employment for prior service</li> </ul>	Maintain for 20 years after employee separates from employment.	Multi	<input type="checkbox"/>
HR-306	<b>Police and Fire Background Records (hired):</b> Includes background investigation and liability waiver, polygraph, pension physical, drug screen, references, criminal history, psychological indexes and reports.	Place in Active Personnel File until employee has successfully completed probation or six months from the date of hire, whichever is longer. Upon removal, replace with memo summarizing what the documents contained.	Multi	<input type="checkbox"/>
HR-307	<b>Organizational Charts &amp; Tables (Personnel &amp; Functional) and Personnel Allocation Charts &amp; Tables</b>	5 Year(s) After Revised or Rescinded unless included in Annual Budget, in which case can be disposed of when no longer of administrative value.	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: HUMAN RESOURCES**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 5/20/2021 | OHC APPROVED: 6/1/2021

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP
HR-308	<b>Fact Finder Reports</b>	Permanent	Multi	<input type="checkbox"/>
HR-309	<b>Training- Employee Training Programs, Publications, Curriculum, Manuals, etc.</b>	2 Year(s) After Revised or Rescinded	Multi	<input type="checkbox"/>
HR-310	<b>Employee Position &amp; Job Bid Requests or Sheets</b>	Until Superseded	Multi	<input type="checkbox"/>
HR-311	<b>Compliance Log (PERRP Form 300p or equivalent log)</b>	6 Year(s)	Multi	<input type="checkbox"/>
HR-312	<b>Labor/ Management and Labor Relations Committee Agendas, Meeting Notes, Recordings</b>	15 Year(s) (After expiration of Contract or Agreement)	Multi	<input type="checkbox"/>
HR-313	<b>Right To Report Unsafe Conditions</b>	3 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>
HR-314	<b>Safety Committee</b>	3 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>
HR-315	<b>Grievances- Non-Union Employees</b>	File According to Content and Maintain Until No Longer of Legal or Administrative Value	Multi	<input type="checkbox"/>
HR-316	<b>Civil Service Commission- Hearing Case Files</b>	7 Year(s) After Case Closed	Multi	<input type="checkbox"/>
HR-317	<b>Labor Archival Files</b>	Permanent	Multi	<input type="checkbox"/>
HR-318	<b>Local 1521 Fire Chief's Hearing (Citizen's Complaint)</b>	5 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>
HR-319	<b>Local 1521 City Manager's Hearing (Citizen Complaint)</b>	3 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>
HR-320	<b>Recruitment Brochures &amp; Activities (City Originals)</b>	5 Year(s)	Multi	<input type="checkbox"/>
HR-321	<b>Affirmative Action Statement</b>	5 Year(s) After Revised or Rescinded	Multi	<input type="checkbox"/>
HR-322	<b>Employee Sick Leave Affidavits</b>	Until no longer of administrative value	Multi	<input type="checkbox"/>
HR-323	<b>Civil Service Rules</b>	6 Year(s) After Revised or Superseded	Multi	<input type="checkbox"/>

**CITY OF UPPER ARLINGTON: HUMAN RESOURCES - DEPARTMENTAL**

**PROPOSED RETENTION SCHEDULE (RC-2)**

*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.

RC APPROVED: | OHC APPROVED:

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
HR-400	<del>Rules, Regulations, Policies &amp; Procedures</del>	<del>6 Year(s) After Revised or Rescinded</del>	Multi	<input type="checkbox"/>	already on GEN
HR-401	Employee Merit Evaluations- Supporting Documentation	Maintain until included in Final Evaluation and No Actions or Appeals Pending	Multi	<input type="checkbox"/>	
HR-402	Employee Work & Assignment Schedules maintained by various departments on Paper, Computer, or Mark & Wipe Planning Boards	Continually Updated	Multi	<input type="checkbox"/>	
HR-403	Employee Exposure to Hazardous Chemicals & Biological Hazards or Infectious Disease Reports & Investigations	35 Year(s) After Employee Leaves Municipal Employment	Multi	<input type="checkbox"/>	
HR-404	Employee Leave Requests (Sick Leave, Vacation, Compensatory Time Off & Specials)	5 Year(s) Provided Audited	Multi	<input type="checkbox"/>	
HR-405	Employee Overtime Authorization	5 Year(s) Provided Audited	Multi	<input type="checkbox"/>	
HR-406	Union Lodge Officials Roster	1 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>	
HR-407	Union Pre-Complaint Forms	3 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>	
HR-408	Union Joint Committee- Physical Fitness & Health programs	3 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>	
HR-409	Union Officers Roster	1 Year(s) After Expiration of Labor Contract or Agreement	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 9/14/2022 | OHC APPROVED: 10/3/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PS-100	Requests for Service	3 years	Multi	<input type="checkbox"/>	
PS-101	Work Orders	5 years	Multi	<input type="checkbox"/>	
PS-102	Traffic Counts & Street Light Studies	5 years	Multi	<input type="checkbox"/>	
PS-103	O.U.P.S. Requests	5 years	Multi	<input type="checkbox"/>	
PS-104	Annual Reports- Divisional (Weekly Reports- Activities Summaries incorporated into annual report)	7 years	Multi	<input type="checkbox"/>	
PS-105	Inventory Report Safety Equipment & Personal Protection Equipment	6 years After Case Revised or Rescinded	Multi	<input type="checkbox"/>	
PS-106	Safety Audits (Facilities & Departments)	6 years And No Longer of Administrative Value	Multi	<input type="checkbox"/>	
PS-107	Maps, Plans, Renderings, Plots- City of Upper Arlington Infrastructure (Includes Water, Storm & Waste Water)	Permanent	Multi	<input type="checkbox"/>	
PS-108	Capital Projects/ Plans & Specifications	25 years	Multi	<input type="checkbox"/>	
PS-109	Permits- Storm Water & Right of Way	3 years	Multi	<input type="checkbox"/>	
PS-110	NPDES- National Pollution Discharge Elimination Systems	5 years	Multi	<input type="checkbox"/>	
PS-111	Exhibits, Plans, Drawings, Plots, Maps & Renderings (Projects not approved or undertaken)	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>	
PS-112	Annual Street Maintenance Program	5 years	Multi	<input type="checkbox"/>	
PS-113	Pavement Inspection Records	5 years	Multi	<input type="checkbox"/>	
PS-114	Culvert Inspection Program	5 years	Multi	<input type="checkbox"/>	
PS-115	<del>Daily</del> Projects/ Inspection Work Log	Incorporate into Project Files	Multi	<input type="checkbox"/>	
PS-116	Master Plan- Traffic	25 years	Multi	<input checked="" type="checkbox"/>	
PS-117	Benchmark Information	Until Obsolete, Superseded or No Longer of Administrative Value	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 9/14/2022 | OHC APPROVED: 10/3/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PS-118	Statements of Qualifications	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>	
PS-119	Records of Private Wells & Sanitation Systems	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>	
PS-120	Vehicle & Equipment Maintenance Records	Life of Equipment	Digital	<input type="checkbox"/>	
PS-121	Aerial Device Inspection Records	Life of Equipment	Multi	<input type="checkbox"/>	
PS-122	EPA- Waste Oil Disposal Records	7 years	Multi	<input type="checkbox"/>	
PS-123	Underground Storage Tank Records	5 years	Multi	<input type="checkbox"/>	
PS-124	Preventative Maintenance Programs	3 years	Multi	<input type="checkbox"/>	
PS-125	SWACO- Solid Waste Authority of Central Ohio- General Records	3 years	Multi	<input type="checkbox"/>	
PS-126	Daily Vehicle Inspections	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>	
PS-127	Conflict Monitoring Test Reports	5 years	Multi	<input type="checkbox"/>	
PS-128	Non-Periodic Reports	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>	
PS-129	Street Sweeper Log/ Daily	1 year	Multi	<input type="checkbox"/>	
PS-130	Street Light Maintenance Records	3 years	Multi	<input type="checkbox"/>	
PS-131	Maintenance & Repair Records- Storm Water & Sewer Collections	5 years	Multi	<input type="checkbox"/>	
PS-132	Confined Space Entry Records	1 year	Multi	<input type="checkbox"/>	
PS-133	Emergency Response Requests	3 years	Multi	<input type="checkbox"/>	
PS-134	Sewer Inspections VCR Tapes/ DVD's	Until No Longer of Administrative Value	Multi	<input type="checkbox"/>	
PS-135	Sewer Cleaning Program Log	10 years	Multi	<input type="checkbox"/>	
PS-136	Right of Entry Permits	1 year	Multi	<input type="checkbox"/>	
PS-137	Fire Hydrant Repair Reports	5 years	Multi	<input type="checkbox"/>	
PS-138	Catch Basin Maintenance Records	5 years	Multi	<input type="checkbox"/>	
PS-139	Culvert Inspection & Cleaning Records	5 years	Multi	<input type="checkbox"/>	
PS-140	Sewer Back Up Records/ Surcharge	10 years	Multi	<input type="checkbox"/>	
PS-141	Man Hole Rehabilitation Program	5 years	Multi	<input type="checkbox"/>	

**CITY OF UPPER ARLINGTON: PUBLIC SERVICE DEPARTMENT - ALL DIVISIONS**

**APPROVED RETENTION SCHEDULE (RC-2)**

RC APPROVED: 9/14/2022 | OHC APPROVED: 10/3/2022

Schedule Number	Record Title & Description	Retention Period	Media Type	RC-3 Required by LGRP	Notes
PS-142	Interceptor Program Reports (for Fats, Oils, and Grease (FOG) Program)	5 years	Multi	<input type="checkbox"/>	
PS-143	Commercial Establishments- Interceptor Cleaning Reports	5 years	Multi	<input type="checkbox"/>	