



Ohio History Connection
State Archives of Ohio
Local Government Records Program
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OHIO HISTORY CONNECTION

JULY 21 2025

STATE AND LOCAL
GOVERNMENT RECORDS

Page 1 of ____

RECORDS RETENTION SCHEDULE (RC-2)– Part 1

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

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

Section A: Local Government Unit

Fairfield County

ADAMH Board

(Local Government Entity)

(Unit)

<u>Marcy Fields</u>	Marcy Fields	Executive Director	7/7/2025
(Signature of Responsible Official)	(Name)	(Title)	(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

Fairfield County

Records Commission

210 East Main Street	Lancaster	43130	(Telephone Number) Fairfield
(Address)	(City)	(Zip Code)	(County)

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

Bennett.niceswanger@fairfieldcountyohio.gov

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

[Signature]
Records Commission Chair Signature

7/8/2025
Date

Section C: Ohio History Connection - State Archives

Local Government Records Archivist 7/21/2025

Signature

Title

Date

Section D: Auditor of State

Records Manager

Signature

Title

Date

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*

Fairfield County

ADAMH Board

(Local Government Entity)

(Unit)

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

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
	Executive Director				☐
ADMH PP	Policies, Procedures, Governance, Regulations	5 Yrs after revised, superseded or discontinued	Multi		☐
ADMH BEVAL	Board Evaluation and strategic planning Materials	Permanent	Multi		☒
ADMH RFP	Agency Oversight & Monitoring, RFPs, RFIs, and applications from agencies. Outcomes, Financials, Audits, Quarterly Reports, Certifications, Proof of Insurance	10 years	Multi		☐
ADMH ASSR	Applications for Provider Funding, OMHAS Assurances	10 years	Multi		☐
ADMH CON	Contracts, contract modifications	10 years	Multi		☐
ADMH CMI	Contracting Meeting Information	10 years	Multi		☐
ADMH RES	Contracting Resources	10 years	Multi		☐
ADMH BDSO	BH Handbook, Board Structure and operations resources, statutory responsibilities, compliance	Until superseded, obsolete, or replaced/appraise for historical value	Multi		☐
ADMH UNI	Major Unusual Incidents	6 years	Multi		☐
ADMH AGM	Agency meeting notes	10 years	Multi		☐
ADAM LAW	Lawsuits, records related to legal claims, subsequent legal actions and court proceedings	5 years after case is closed and appeals are exhausted	Multi		☐

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*

Fairfield County

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ADAM LEGN	notes from legal consultations	5 years	Multi		☐
ADAM ORG	Organizational Chart	Until superseded	Multi		☐
ADAM BDMAT	Board member materials- individual and meetings, handouts and resources, including strategic plan and board member self-evaluations	10 years	Multi		☐
ADAM OMAS	OHMAS materials and correspondence	5 years	Multi		☐
ADAM FCFC	Notes and correspondence from required committees (Family and children's first council exec comm for ex)	10 years	Multi		☐
ADAM CCC	County Commissioner correspondence and materials	5 years	Multi		☐
ADAM APP	Appcare materials and correspondence	10 years	Multi		☐
ADAM AGD	agency directors' meetings and correspondence	10 years	Multi		☐
ADAM RFP	any competitive bidding or RFP processes	10 years	Multi		☐
	Office Assistant				☐
ADMH SMN	Staff Meeting Notes	Destroy when no longer administrativel y necessary.	Electronic		☐
ADMH BMF	Board Member Personnel Files, including appointments, terms served and applications	Permanent	Multi		☒
ADMH BMO	Board Member Onboarding Materials	5 years after revised, superseded, or obsolete.	Electronic		☐

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ADMH BMA	Board Meeting Agendas	2 years	Electronic		☐
ADMH BMM	Board Meeting Minutes	Permanent	Electronic		☒
ADMH CMA	Committee Meeting Agendas	2 years	Electronic		☐
ADMH CMM	Committee Meeting Minutes	Permanent	Electronic		☒
ADMH BMT	Board Member Meeting Attendance	Permanent	Electronic		☐
ADMH BAT	Board Member Annual Training	5 years	Electronic		☐
	Finance and Operations Director				☐
ADMH 040	040 Reporting - Budget and Actual	7 Years	Multi		☐
ADMH INS	ADAMH & Agency Liability Insurance	5 Years	Electronic		☐
ADMH AA	ADAMH & Agency Audit Information	7 years	Multi		☐
ADMH CAP	Capitol Planning, Housing Projects, Community Plans	7 years	Multi		☐
ADMH FIN	Financials, Funding Requests	7 years	Multi		☐

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ADMH GRNT	Grant Files - Awarding, monitoring, tracking, invoicing	As required by grant; if unspecified, 5 years provided all State and Federal audits have been conducted, the audit reports released and litigation, claims or audit findings have been resolved.	Multi		☐
ADMH LEV	Levy Financial Detail - Forecasting	7 years	Electronic		☐
ADMH APX	Agency Appendices	10 years	Electronic		☐
ADMH FINSUP	Financial Closing Entries-Monthly Financials - support documents	7 years	Multi		☐
ADMH BGT	Annual Operating Budget - for the ADAMH FY as well as the County calendar year	3 years	Electronic		☐
ADMH GFMS	Federal/ State Allocations - Documentation such as the yearly allocation notices, changes, carryover information	7 years	Multi		☐
ADMH RESFN	County Resolutions - Financial related	7 years	Electronic		☐
ADMH SEFA	Calendar year SEFA	7 years	Electronic		☐
ADMH LES	Leases and Subleases	until expired and audited	Multi	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.	☐
ADMH DTE	DTE forms and exemption of RE Tax	7 years	Multi		☐
ADMH BWC	BWC annual premium and refunds	7 years	Electronic		☐

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ADMH PAC	Friends of ADAMH PAC Information - Bank statements, deposits, receipts, expenses, other documents related to the PAC	7 Years	Multi		☐
ADMH LEGL	Legal Advertisements/Notices; Legal announcements to inform the public of meetings, hearings, bids or other events	3 Years	Multi		☐
ADMH PRV	Prevailing wage applications, housing voucher materials	3 Years	Multi		☐
	Fiscal Officer				☐
ADMH W9s	W-9s (Request of Taxpayer ID Number) and New Vendor Requests forms	until updated, superseded or obsolete	Multi		☐
					☐
ADMH PO	Purchase Orders	4 years	Multi		☐
ADMH VEN	Vendor Forms	until updated, superseded or obsolete	Multi		☐
ADMH AP	Accounts Payable: Requisitions, invoices and warrant details, statements - Invoice tracking Smartsheets	4 years	Multi		☐
ADMH REV	Accounts Receivable - Pay In Detail	4 years	Multi		☐
ADAMH CSHR	Receipts/receipt books	3 years	paper		☐
ADMH CAP AST	Capital and Fixed Asset Listing - acquisitions and disposals forms	3 Years	Multi		☐
ADMH RR	Ohio Public Records Compliance Folder (May contain appropriate RC-1, RC-2, or RC-3 forms)	25 years after revised, superseded or discontinued	Multi		☐
ADMH RFR	Public record requests	3 years	Multi		☐
ADMH HR	Human Resources, employee records, employee training information (personnel records) employment application/resume, background information, references, new	Retain portions used to verify employment, retirement, or OPERS contributions until	Multi		☐

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	hire action form, offer letter, w4 and I-9, EEO Data Form, Employee Policy Acknowledgements, conflict of interest statement, disciplinary records, leave, performance reviews, terminations	75 years after separation. Purge all other records 6 years after separation.			
ADMH	Employment applications - not hired	2 Years	Multi		☐
ADMH JD	Job Descriptions	Until revised, superseded or obsolete	Multi		☐
ADMH PAY	Payroll Paychecks, Earnings detail proofs	4 years	Multi		☐
ADMH ACC	Accruals Tracks vacation, sick and compensatory time used by employees. Final accrual report kept in permanent personnel file.	3 years	Multi		☐
ADMH ACR	Accident Reports	6 Years	Multi		☐
ADMH MED	Employee medical related docs	6 Years after termination	Multi		☐
ADMH FR	GOSH Funding Review	3 years	Electronic		☐
ADMH GOSH CS	GOSH Claim Summaries	3 years	Multi		☐
ADMH ERA	GOSH E Remittance Advice	until superseded	Electronic		☐
	Clinical Care Coordinator				☐
ADMH FOR	Client Records - Forensic (retention period starts when commitment ends)	10 years	Mixed		☐
ADMH HLTH	Health Officer Documentation	7 years	Mixed		☐
ADMH HOSP	Hospitalizations	7 years	Mixed		☐
ADMH CL	Contact Logs - Smartsheets	7 years	Electronic		☐
ADMH RRQ	HIPAA - record requests forms/documentation	7 years	Multi		☐
ADMH GRV	Client Rights filings and grievances (official)	Permanent	Multi		☐
ADMH MUI	Major Unusual Incident Reports	6 years	Multi		☐
ADMH PHR	Central Pharmacy Reports	7 years	Multi		☐

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	Prevention and Communication Manager				☐
ADMH MHA	MH First Aid	MHFA - 7 years	Multi		☐
ADMH YBS	Youth Behavior Surveys, Referral Source Surveys	YBS - permanent, Referral Source Surveys 7 years	Multi		☐
ADMH SCH	School Based Prevention	5 years	Multi		☐
ADMH GRT AP	RCORP Grant - Application, evaluation, awards, monitoring, reports and tracking	Maintain record as required by grant/s: if unspecified, 5 years	Multi		☐
ADMH INT	OU Interns 2000-01 (In cab)	6 years unless under OPERS then 75 years after separation	Multi		☐
ADMH CEU	CEU's for Trainings	5 years	Multi		☐
ADMH PART	P.A.R.T. Coalition meeting agenda and notes (FKA Opiate Task Force)	Agendas - 2 years, Notes 10 years	Multi		☐
	Program and Quality Manager				☐
ADMH ATP	Addiction Treatment Program reports	7 Years	Electronic		☐
ADMH CT	Court Dockets for Addiction Treatment Program	7 years	Electronic		☐
ADMH CTP	Community Transitions Program reports	7 years	Electronic		☐
ADMH GAM	Problem Gambling Program reports	7 years	Electronic		☐
ADMH TB	90% Capacity, and Tuberculosis Reports to OMHAS	7 years	Electronic		☐
ADMH GRT	Grant Files - Documentation such as the application, evaluation, awarding, monitoring, and tracking of grants received.	Maintain records as required by grant; if unspecified, 5 years	Multi		☐

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ADMH ATW	Access to Wellness referrals	7 years	Electronic		☐
ADMH AOT	Assisted Outpatient Treatment and Probate Legal Documents/Records (retention period starts when commitment ends)	7 years	Multi		☐
ADMH CNM	Contract Monitoring Reports	10 Years	Multi		☐
ADMH WRP	Receipts and requests for wrap-around funding	7 years	Electronic		☐
ADMH COQ	COQ Detailed Surveys	10 Years	Electronic		☐
ADMH PEER	Peer Support Training applications and class attendee lists	6 years	Multi		☐
ADMH OUT	Program Outcomes and Demographics	10 years	Electronic		☐
ADMH IDAT	Indigent Drivers	7 years	Electronic		☐
	Public Relations Coordinator				☐
ADMH AR	Annual Reports	Permanent	Multi		☒
ADMH MLD	Mailing List Database List of individuals and addresses for mail distribution	until updated, superseded or obsolete	Electronic		☐
ADMH AD	Advertising bulletins used for the sole purpose of informing others of events or activities, including presentations and speeches	Until updated, superseded or obsolete or 30 days after the event is complete	Electronic		☐
ADMH DISD	Distribution/Display Materials	Until updated, superseded or obsolete or event is over	Multi		☐
ADMH NEWS	Newsletter - Previous Issues	1 year	Electronic		☐
ADMH WEB	Website content, Photographs, negatives, and electronic images	Retain images that have significant legal, fiscal, administrative, or historical value.	Multi		☐
ADMH FOAN	Press and News Releases, Awards, newspaper articles and clippings	5 years and no longer of historical value	Multi		☐
ADMH FOA	Friends of ADAM nominations	Permanently	Electronic		☐

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ADMH LEVM	Levy Materials	Permanently	Multi		☐
ADMH AUD	Audiovisual materials	Until updated, superseded or obsolete	Electronic		☐
	GOSH Specialist				☐
ADMH GRF	Generated report files	No longer of administrative value	Electronic		☐
ADMH MED	Medicaid inquiry and response files	No longer of administrative value	Electronic		☐
ADMH CP	Custom Reports	No longer of administrative value	Electronic		☐
ADMH SQL	SQL script/Queries/Config Files	No longer of administrative value	Electronic		☐
ADMH SCRN	Screenshots	No longer of administrative value	Electronic		☐
ADMH AGLS	Hosted Agency List, Contact, and Schedule Document	Life of hosting contracts	Electronic		☐
ADMH USIP	Hosted Agencies IP and User list Audits Document	6 years	Electronic		☐
ADMH TRM	Training Material	No longer of administrative value	Electronic		☐
ADMH DISP	Disparities Log	No longer of administrative value	Electronic		☐
ADMH TIME	Time Tracking Document	No longer of administrative value	Electronic		☐
	Grant Writer and Manager				☐
ADMH GRTS	Successful Grant Application Materials	10 Years	Multi		☐
ADMH GRTU	Unsuccessful Grant Application Materials	5 Years	Multi		☐

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ADMH CGM	Capital Grant Materials	25 Years	Multi		☐
ADMH SUR	Client Satisfaction Surveys	No longer of administrative value	Multi		☐
ADMH NEA	Needs Assessment, surveys	Permanent	Multi		☐
ADMH CP	Annual Community Plan	Permanent	Multi		☒
	Construction and Facilities Manager				☐
ADMH FI	Facilities Information	Life of structure	Multi		☐
ADMH PM	Plats and Maps	Permanent	multi		☒
ADMH Cap Pro	Capital Project Binders, Architectural Renderings, Proposals, Specifications and related records	Life of Structure	Multi		☐
ADMH SECR	Door Locks and security	1 Year	Multi		☐
ADMH SAF	Equipment and Safety - Manuals, Inspections & Certifications	until equipment is sold, scrapped or no longer the property of the county	Multi		☐
ADMH MANT	Maintenance agreements and repair records	1 year after the equipment is sold, scrapped or no longer the property of the county	Multi		☐
ADAMH UBID	Unsuccessful Bids	2 years	multi		☐
ADMH BID	Bids/Request for Bids/proposals/Requests for Proposals	5 Years	Multi		☐
	Senior IT Specialist				☐

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ADMH HD	Computer Hard Drives removed from computers that are being recycled	1 years after being removed from computer	Multi		☐
ADMH BU	All Backup Data	Retain for one system backup cycle	Multi		☐
ADMH MAN	Materials, manuals or brochures on equipment	No longer of administrative value	Multi		☐
ADMH QUO	Vendor Quotes	No longer of administrative value	Multi		☐
ADMH VID	Video Camera Footage	Retain 30 days	Multi		☐
ADMH TRN	Proof of completed Training	Retain for 6 years or 1 year after employee leaves	Multi		☐
ADMH HPOL	Attestation of Procedures and Policies	Retain for 6 years or 1 year after employee leaves	Multi		☐
ADMH TMAT	Training Materials	No longer of administrative value	Multi		☐
ADMH DOC	Instructional Documentation	No longer of administrative value	Multi		☐
ADMH CONF	Confidentiality Agreements for Non-Employees	6 years or no longer of administrative value	Multi		☐
	Database Developer				☐
ADMH INSD	Instruction Documents	No longer of administrative value	Electronic		☐
ADMH SAMP	Sample Reports	No longer of administrative value	Electronic		☐

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ADMH DATA	Data Exports	No longer of administrative value	Electronic		☐
ADMH CRITWF	Critical Waterfall Database Information Document	No longer of administrative value	Electronic		☐
ADAH MED	Medicaid Behavioral Health State Plan Services - Provider Requirements and Reimbursement Manual	No longer of administrative value	Electronic		☐
ADMH MIP	Fund, Service, Program codes	No longer of administrative value	Electronic		☐
ADMH CLA	837 Claim files, files submitted by agencies for payment	7 Years	Electronic		☐
ADMH ENR	GOSH Client Claim and enrollment level data	7 Years	Electronic		☐
ADMH REV	Reverse member and claims extracts	until superseded	Electronic		☐
	GOSH				☐
ADMH HPPA	Privacy Notices - HIPAA & PISA Privacy Notice notification and cover letter, names/addresses of those provided and returned mailings	6 years	Multi		☐

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	Not Department Specific				☐
ADMH TMP	Computer generated administrative & fiscal reports (Non-specific and periodic that may be recreated)	May be destroyed in the normal course of business as soon as they are considered of no value by the person holding them	Multi		☐
ADMH PRO	Desk Manual - Essential Functions and associate procedures and directions	until updated, superseded or obsolete	Multi		☐
ADMH COR	General Correspondence: All sent/received correspondence, in any medium that serves to document the organization, supported agencies, functions, policies, decisions, operations or other activities that serve the public	1 Year and no longer of administrative, legal or fiscal value. Appraised for historical value. File according to content.	Multi		☐
ADAH QUT	documentation on acquiring 3 quotes for large purchases or services	Until no longer of administrative value	Electronic		☐
ADMH VM	Voice Mail, Text messages and electronic images	May be destroyed in the normal course of business as soon as they are considered of no value by the person holding them	Electronic		☐

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.***Fairfield County****ADAMH Board**

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ADMH UNSO	Unsolicited correspondence/unsolicited mail/unsolicited email and similar unsolicited communications	May be destroyed in the normal course of business as soon as they are considered of no value by the person receiving the record	Multi		☐
ADMH BAA	Business Associate Agreements	5 Yrs after revised, superseded or discontinued	Multi		☐
ADMH EML	Electronic Mail Systems (pertain only to messages that are records as defined in ORC section 149.011(G) and 149.43)	Retain email that has a significant administrative, fiscal, legal or historical value. Maintain according to content (Refer to RC-2). Erase email that has no significant value. (RC-3 not required)	Electronic		☐
ADAMH DRFT	Draft documents	Until superseded	Multi		☐
ADAMH SS	Smartsheet Sheets	No longer of administrative value	Electronic		☐