



Ohio History Connection
State Archives of Ohio
Local Government Records Program
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www.ohiohistory.org/lgr

OHIO HISTORY CONNECTION

OCTOBER 11, 2024

STATE AND LOCAL
GOVERNMENT RECORDS

Page 1 of 6

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

City of Trotwood – Human Resources Department

(Local Government Entity)

(Unit)

Stephanie Kellum

Stephanie Kellum, Deputy City Manager/Human Resources Manager

09/19/2024

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

Records Commission, City of Trotwood

937-854-7212

(Telephone Number)

3035 Olive Road, Trotwood, 45426; Montgomery County

(Address)

(City)

(Zip Code)

(County)

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

klandis@trotwood.org

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.

10/10/2024

Records Commission Chair Signature

Date

Section C: Ohio History Connection – State Archives

Digitally signed by Amy
Hisson

Government Records Archivist

10/18/2024

Signature

Date: 2024.10.18 17:47:37
-04'00'

Title

Date

Section D: Auditor of State

Martin E. Meeks

Digitally signed by Martin E. Meeks
Date: 2024.10.24 12:37:26 -04'00'

Records Manager

Signature

Title

Date

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

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

City of Trotwood – Human Resources Department

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
GENERAL ADMINISTRATIVE RECORDS					
HR-ADM-01	Accident Reports/Files, Employee Injury Reports, Bodily Injury to Non-Employee	6 Years Provided No Action Pending	Paper and/or Electronic		☐
HR-ADM-02	Damage to Municipal Vehicle or Property	6 Years Provided No Action Pending	Paper		☐
HR-ADM-03	Attendance Reports/Records	3 Years	Paper and/or Electronic		☐
HR-ADM-04	Badges and IDs	Upon Separation	Paper		☐
HR-ADM-05	Correspondence – Executive	5 Years (Supersedes General Schedule)	Paper and/or Electronic		☐
HR-ADM-06	Manuals, Handbooks, and Directives	Until Superseded, Obsolete or Replaced; Retain File Copy for 5 Years (Supersedes General Schedule)	Paper and/or Electronic		☐
HR-ADM-07	Speeches/Presentations	3 Years (Supersedes General Schedule)	Paper and/or Electronic		☐
HR-ADM-08	System Documentation	Life of System	Electronic		☐
HR-ADM-09	Insurance Policies	6 Years after expiration, provided all claims settled	Paper and/or Electronic		☐
PERSONNEL RECORDS					
HR-PER-01	Employment Applications and Supporting Documents (resumes, testing materials, etc.) Hired	Personnel File (HR-PER-18)	Paper; Electronic Destroyed Upon Hire		☐
HR-PER-02	Employment Applications and Supporting Documents (resumes, testing materials, etc.) Not Hired	3 Years	Paper and/or Electronic		☐
HR-PER-03	Commendations, Promotions	Personnel File (HR-PER-18)	Paper		☐

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City of Trotwood – Human Resources Department

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
HR-PER-04	Reports: Employee Exposure to Hazardous Chemicals/Biological Hazards/Infectious Diseases	Personnel File (HR-PER-18)	Paper		☐
HR-PER-05	Employee Performance Evaluation	5 Years	Paper		☐
HR-PER-06	Employee Sick Leave and Vacation Balances	Continually Updated by Fiscal Office Until Separation	Paper and/or Electronic		☐
HR-PER-07	Employee Training Records	Personnel File (HR-PER-18)	Paper and/or Electronic		☐
HR-PER-08	Employee Exit Interviews/Questionnaires	2 Years	Paper		☐
HR-PER-09	Grievance Hearing Records	1 Year After Resolution	Paper		☐
HR-PER-10	Insurance Enrollment Records	1 Year After Separation	Paper		☐
HR-PER-11	Job/Position Descriptions	1 Year After Superseded	Paper and/or Electronic		☐
HR-PER-12	Labor Union Agreements	15 Years After Separation	Paper and/or Electronic		☐
HR-PER-13	Leave Requests – All Types (Sick, Vacation, Medical, etc.)	3 Years Provided Balances Journalized	Paper and/or Electronic		☐
HR-PER-14	Letter of Appointment	Personnel File (HR-PER-18)	Paper		☐
HR-PER-15	Letter of Reference	2 Years After Hired	Paper and/or Electronic		☐
HR-PER-16	Letter of Resignation	3 Years After Separation	Paper and/or Electronic		☐
HR-PER-17	Personnel Actions	Personnel File (HR-PER-18)	Paper		☐

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HR-PER-18	Personnel Files/Records	Permanent Records include service time, salary history, leave balances, taxes paid, resignation type, retirement information, and waivers. In lieu of these documents use electronic employment history data. Otherwise, 6 Years After Separation	Paper and/or Electronic		☐
HR-PER-19	OSHA/PERRP Related Records	20 Years	Paper		☐
HR-PER-20	Promotion Action	Personnel File (HR-PER-18)	Paper		☐
HR-PER-21	Disciplinary Action	4 Years	Paper		☐
HR-PER-22	Reports to Bureau of Employment Services	2 Years	Paper		☐
HR-PER-23	Unemployment Compensation Case Files	10 Years After Date of Final Payment	Paper and/or Electronic		☐
HR-PER-24	Worker's Compensation Case Files	10 Years After Date of Final Payment	Paper and/or Electronic		☐
CIVIL SERVICE COMMISSION RECORDS					
HR-CSC-01	Background Investigations	2 Years After Position Eligibility List Expires	Paper		☐
HR-CSC-02	Civil Service Examination Announcements	2 Years After Position Eligibility List Expires	Paper		☐
HR-CSC-03	Classified Employees List	Until Superseded	Paper		☐

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(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
HR-CSC-04	Eligibility List	Until Position Eligibility List Expires	Paper and/or Electronic		☐
HR-CSC-05	Employment Information Files	Until Superseded	Paper		☐
HR-CSC-06	Hearing Case Files	10 Years	Paper		☐
HR-CSC-07	Job Classification List	Until Superseded	Paper		☐
HR-CSC-08	Job/Position Descriptions	1 Year After Superseded	Paper and/or Electronic		☐
HR-CSC-09	Polygraph/Voice Analysis Examinations	2 Years After Position Eligibility List Expires	Paper		☐
HR-CSC-10	Substance Reports	2 Years After Position Eligibility List Expires	Paper		☐
LEGAL RECORDS					
HR-LEG-01	Case Files, Civil Action (EEO, OCRC, harassment, discrimination, etc.)	10 Years and Audited	Paper		☐
HR-LEG-02	Claims for Damages	2 Years After Judgment and All Appeals Exhausted	Paper and/or Electronic		☐
HR-LEG-03	Liability Waivers	3 Years Provided No Action Pending	Paper		☐
HR-LEG-04	Settlements	3 Years After Judgment and All Appeals Exhausted	Paper		☐
HR-LEG-05	USCIS I-9: Employment Eligibility Form	1 Year After Separation	Paper		☐

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MEDICAL RECORDS					
HR-MED-01	Employment Physicals	Duration of Employment then 4 Years	Paper		☐
HR-MED-02	Drug Testing Results	Duration of Employment then 5 Years	Paper		☐
HR-MED-03	Family Medical Leave Act (FMLA) (certification, leave records, etc.)	Duration of Employment then 3 Years	Paper		☐
VEHICLE RECORDS					
HR-VEH-01	Vehicle Ownership Records	2 Years After Sale or Disposition	Paper		☐
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