

**VILLAGE OF WESTON, OHIO**  
**RECORDS RETENTION SCHEDULE**

**Section 1- Council Records**

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
GOV-001	Ordinances/Resolutions	Permanent	Paper		
GOV-002	Legal Publications of Ordinances/Resolutions (Notarized certificates from local newspaper)	2 years (or until audited)	Paper		
GOV-003	Ohio Basic Code and Codified Village Supplement	Until revised/outdated	Paper		
GOV-004	Council Meeting Minutes	Permanent	Paper		
GOV-104	Council Meeting Notes/Draft Version	Until hard copy is written	Paper		
GOV-105	Council Meeting Agendas	4 years	Paper		
GOV-006	Committee Meeting Minutes	Permanent	Paper		
GOV-106	Committee Meeting Notes/Draft Versions	Until hard copy is written	Paper		
GOV-007	Published Notices of Special Meetings	2 years	Paper		
GOV-008	Council Photos	Term of Office/Until Updated	Electronic		
GOV-009	Proclamations	2 years	Paper		
GOV-010	Audio Recordings of Meetings (if taken)	1 year	Electronic		

**Section 2- Administrative Records**

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
ADM-001	Transient Materials--- Post-it notes, phone messages, meeting notes, drafts, junk mail/emails, digital voice recordings	Until acted upon and/or no longer of value	Paper/Electronic		
ADM-002	Email Communication & Text Messages (job related)	Until no longer of value	Electronic		
ADM-003	Blank Forms	Until revised/outdated	Paper/Electronic		
ADM-004	Daily Planners (Fiscal Officer only)	3 years	Paper		
ADM-005	Community Newsletters	2 years	Paper/Electronic		
ADM-006	Continuing Education Certificates- Fiscal Officer (Includes CPIM, Vill FO annual training, BWC, etc)	2 years (or until audited)	Paper		
ADM-007	Banking- Depository Agreements	Until revised/outdated (after audited)	Paper		
ADM-008	Valuation Statements from County Auditor (annual)	10 years	Paper		
ADM-009	Grant Applications/Documents--- *CDBG/OPWC/Other Grants- Awarded *CDBG/OPWC/Other Grants- Not Awarded *Wood Co Park District Grants (all) *BWC Safety Intervention Grants *Comm Dev Fund Apps (Suburban Nat Gas)	5 years 3 years 6 years 10 years 6 years	Paper Paper Paper Paper Paper		
ADM-010	Sheriff/Police Protection Information--- *Contract(s) with Wood Co Sheriff's Dept *Rate Increase Notices *Monthly Sheriff's Reports/Call summaries *BG Muni Court- Fee Summary Reports *Any/all files pertaining to old department (end '97)	Until revised/outdated 4 years 5 years 2 years (or until audited) None	Paper Paper Paper Paper Paper		
ADM-011	Utility Information--- *Toledo Edison letters/info/correspondence *Electric Aggregation Information *Suburban Nat Gas agreements/correspondence *NWWSD agreements/info/correspondence *Any/all files pertaining to old water/sewer dept	5 years 2 years after end of program 5 years 5 years None	Paper Paper Paper Paper Paper		
ADM-012	Legal Information--- *Solicitor/Prosecutor Correspondence *Public Defender Contracts (annual) *Lawsuits/Court Proceedings (if any)	3 years 3 years 5 years after closed	Paper/Electronic Paper Paper		
ADM-013	Land documents/deeds/titles/purchase info	Permanent, unless sold	Paper		
ADM-014	Special Assessments--- *Violation Notices (yellow copies) *Certifications to County Auditor--- Annual Street Lighting Amount Snow/Grass/Junk/Sidewalks- for tax duplicate *Spreadsheet(s) of Charges Invoiced/Assessed *Outstanding Assessment Spreadsheet	3 years 3 years 3 years Info deleted when paid	Paper Paper Electronic Electronic		
ADM-015	Solid Waste District Info--- *Annual Recycling Reports *Annual Reporting Forms (and back-up info) *WCSWD Correspondence *5-Year Plan(s)/Council Approval	4 years 4 years 3 years Until revised	Paper Paper Paper Paper		

ADM-016	County Emergency Management Agency (EMA) Info--- *Civil Defense Agreements (with per capita amt) *Mitigation Plan(s)/Council Approval *Letters/Correspondence *EMA Grant Applications	4 years Until revised/outdated 3 years 6 years	Paper Paper/Disk Paper/Electronic Paper		
ADM-017	Liability Insurance Documents--- *Annual Policy/Coverage Listings *Claim documents *Bonds (Fiscal Officer/Public Officials) *Loss Control Surveys/Responses (bi-annual)	5 years 5 years 5 years 6 years (3 cycles)	Paper Paper Paper Paper		
ADM-018	Fire Insurance Proceed Info (held in trust)	2 years after paid out	Paper		
ADM-019	Ohio DAS Co-op Purchasing Information--- *Annual Contracts *Quarterly Usage Reports	4 years 3 years	Paper Electronic		
ADM-020	Cable Franchise Agreements/Info Cable Franchise Correspondence/Update Letters	Until revised/outdated 3 years	Paper Paper		
ADM-021	Liquor License Requests/Reports/Information	5 years	Paper		
ADM-022	Census Information/Correspondence	10 years	Paper		
ADM-023	GovDeals- Asset Information	1 year after sold	Electronic		
ADM-024	1099 and 1096 Forms	6 years	Paper		
ADM-025	Vendor W9s/BWC Certs/Contracts (when applicable)	1 year after vendor is inactive	Paper		
ADM-026	Phone Service Contracts- Cells and Landlines	4 years	Paper		
ADM-027	Postage Meter Contract(s)	5 years (or 2 cycles)	Paper		
ADM-028	Copier Service Contract(s)	Until revised/outdated	Paper		
ADM-029	Uniform Service Contract(s)	5 years (or 2 cycles)	Paper		
ADM-030	EPA Notices	3 years	Paper		
ADM-031	Notices of Bankruptcy	2 years	Paper		
ADM-032	Ethics Commission Determinations (if any)	10 years	Paper		
ADM-033	Photos	Until no longer of needed/ Assess for historical value	Electronic		
ADM-034	Log of Public Records Requests	5 years	Paper		
ADM-035	Records Retention Documents/Filings	20 years	Paper		

### Section 3- Accounting Records

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
ACC-001	Payment Records/Invoices/Check Stubs	6 years	Paper		
ACC-101	Purchase Orders/Blanket Certificates (Originals)	6 years	Paper		
ACC-201	Purchase Order/Blanket Certificate Reports (UAN)	6 years	Paper		
ACC-002	Revenue/Receipt Documents	6 years	Paper		
ACC-003	Remote Deposit Sheets/Scanned Checks	2 years (or until audited)	Paper		
ACC-004	Bank Statements	6 years	Paper		
ACC-104	Bank Reconciliation Reports (signed by council)	6 years	Paper		
ACC-204	Cash Journal Reports (UAN)	6 years	Paper		
ACC-005	Fund Register- Primary Checking Account	6 years	Electronic (Excel)		
ACC-105	Fund Status/Fund Summary Reports	6 years	Paper		
ACC-006	Pooled Collateral Statements	2 years (or until audited)	Paper		
ACC-007	Public Investment Policy	Until revised/outdated	Paper		
ACC-107	Investment Certificates/Paperwork/Maturity Info	2 years (or until audited)	Paper		
ACC-207	Investment Reports (from UAN)	2 years (or until audited)	Paper		
ACC-008	Budgetary Items (Revenue)--- *Certificates of Estimated Resources (all) *Annual Estimate of Revenue *Annual Certs of Total Amt Available plus Balances *Annual LGF Estimate- County Auditor *Revenue Status/Revenue Ledger Reports (UAN)	6 years	Paper		
ACC-009	Budgetary Items (Appropriations)--- *Temporary/Permanent Appropriations *Appropriation Amendments & Realignment *Appropriation Workpapers *Approp Status/Approp Ledger Reports (UAN) *County Auditor's Appropriation Certification	6 years	Paper		
ACC-010	Budget Comm Tax Rate Certification Resolutions	6 years	Paper		
ACC-011	Real-Estate Tax Reports/Breakdowns	6 years	Paper		
ACC-012	Income Tax Documents (RITA)--- *Distribution Summary Reports *Proportionate Allocation Breakdowns (annual) *Annual/Monthly Comparison Spreadsheet *Subpoena Program Information *Delinquent Taxpayer Lists *Landlord Reporting Forms	6 years 4 years 5 years worth 4 years 2 years 1 year after sent to RITA	Paper Paper Electronic (Excel) Paper Paper Paper/Electronic		

	*Court Hearing Summary Reports	2 years	Paper		
	*Legal Account Reconciliation Reports	2 years	Paper		
ACC-013	Bonds/Loans/Debt Documentation (if any)	Life of loan, plus 2 years	Paper		
ACC-014	Annual Financial Reports (AFRs), printed	10 years	Paper		
ACC-114	AFR CD (duplicate copy of AOS filing)	2 years (or until audited)	Electronic (Disk)		
ACC-015	Audit Reports- FINAL (from AOS/IPA)	10 years	Paper		
ACC-115	Audits- IPA Selection Process Info/Docs	6 years	Paper		
ACC-016	UAN Back-ups/Software Update CDs	2 years (or until audited)	Electronic (Disk)		

#### Section 4- Payroll Records

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
PR-001	Timesheets/pay stubs	6 years	Paper		
PR-002	Payroll Tax Documents--- *EFTPS, State, School Dist, City tax pymts *Quarterly 941s *Annual filings/reconciliations	6 years	Paper		
PR-003	Payroll Journal/Summary Reports (UAN)	6 years	Paper		
PR-004	Garnishments/Child Support Orders	2 years after inactive	Paper		
PR-005	Unemployment Compensation Documents	6 years	Paper		
PR-105	Quarterly Unemployment Filings	6 years	Paper		
PR-006	OPERS Payments/Statements/Other Info	10 years	Paper		
PR-007	W2 and W3 forms	10 years	Paper		
PR-008	Village Employee Handbook	Until revised/outdated	Paper/Electronic		
PR-009	Employee/Personnel Files--- *Employee Resume/Application (when applicable) *Resignation Letters *W4s, IT-4s, IRS I-9s, New Hire Reporting Forms *Employee Evaluations/Promotions *Employee Reprimands/Disciplinary Action *Employee Pay Ordinances (when applicable) *FMLA Requests/Records *Employee Grievance Information/Documents	5 years after dismissal	Paper		
PR-010	BWC Documents--- *Premium Payments (and rate calc workpapers) *Rate Information/Projections *Employee Claim Info/Accident Reports *TPA/MCO Contracts/Info *PERRP Logs	5 years	Paper		
PR-011	Employee Labor Law Posters	Until revised/outdated	Paper/Wall Posters		

#### Section 5- EMS Department Records

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
EMS-001	EMS Contracts for Services (all entities)	15 years	Paper		
EMS-002	EMS Run Sheets	10 years	Paper/Electronic		
EMS-003	Patient Payment Documents (insurance, etc)	10 years	Paper		
EMS-004	Clerk's EMS Receipt Books	10 years	Paper		
EMS-005	EMS Run Rate Information (BLS, ALS1, ALS2, Mlg)	15 years	Paper		
EMS-006	EMS Billing Company Contract(s)	Until revised/outdated	Paper		
EMS-007	Ambulance/Vehicle Titles	Until sold/transferred	Paper		
EMS-008	Ambulance/Vehicle Maintenance Logs	Life of Vehicle	Paper		
EMS-009	Life Pak Contracts/Maintenance Info	7 years	Paper		
EMS-010	Div of EMS- Reimbursement Grant Documents	6 years	Paper		

#### Section 6- Fire Department Records

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
FD-001	Run Reports	10 years	Paper/Electronic		
FD-002	Commercial Inspections	5 years	Paper		
FD-003	Residential Inspections	5 years	Paper		
FD-004	Mutual Aid Agreements	Until revised/outdated	Paper		
FD-005	Fire Contracts (Weston & Plain Twps)	10 years	Paper		
FD-006	Contract Invoices (Weston Twp)	10 years	Paper		
FD-007	Radio Licensing/Call Sign Information	15 years	Paper		
FD-008	Disaster Plans/Incident Command (NIMS)	Until revised/outdated	Paper/Electronic		
FD-009	Emergency Sirens- Maintenance/Info/Contracts	5 years	Paper		
FD-010	Vol FF Dependents' Fund (VFDF) Assessments	10 years	Paper		
FD-011	VFDF Valuation & Board Appointment Forms	10 years	Paper		
FD-012	VFIS Insurance Documents/Info	10 years	Paper		

FD-013	VFIS Beneficiary Designations	Until revised/outdated	Paper		
FD-014	Vol FF Training Reimbursement Apps/Receipts	6 years	Paper		
FD-015	Div of EMS- Reimbursement Grant Documents	6 years	Paper		
FD-016	Firefighter Training Logs/Sign-In Sheets	4 years	Paper		

### Section 7- Maintenance/Road Department Records

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
MNT-001	Vehicle Titles	7 years	Paper		
MNT-002	Vehicle Maintenance Logs	Life of Vehicle	Paper		
MNT-003	Equipment Info (Leaf Vac/Chipper/etc)	Life of Equipment	Paper		
MNT-004	Golf Cart Permits/Registration	4 years	Paper		
MNT-005	Street Light Outages- Repair Req (to Toledo Edison)	Until handled/fixd	Paper		
MNT-006	Street/Alley Vacation Documents (reflected on zoning map)	15 years	Paper		
MNT-007	Street Sweeping Agreements (annual)	3 years	Paper		
MNT-008	Sidewalk Project Plans/Documents	Life of Project, plus 5 years	Paper		
MNT-009	Spray Logs/Documents- Pesticides	6 years	Paper		
MNT-010	Spray Logs/Documents- Mosquito Spray	6 years	Paper		
MNT-011	Spray Certification/Continuing Education Certificates	6 years	Paper		
MNT-012	Material Safety Data Sheets (MSDS)	Until revised/outdated	Paper		

### Section 8- Cemetery Records

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
CEM-001	Plat Books/Lot Location Info	Permanent	Paper		
CEM-002	Cemetery Lots- Deed Copies (originals go to buyer)	Permanent	Paper		
CEM-003	Cemetery Levy Documents/Info--- *Resolution of Necessity *Proposed Ballot Language/Approval *Certificate of Estimates Tax Revenue *Resolution to Proceed to Ballot *Election Result Certificate	15 years or 3 cycles	Paper		
CEM-004	Cemetery TRUST Documents/Info/Certificates	Permanent	Paper		
CEM-005	Grave Opening/Closings (information sheets)	4 years	Paper		
CEM-006	Foundation Information/Invoices	4 years	Paper		
CEM-007	Cemetery Board- Member & Term Listings	Until revised/outdated	Paper		

### Section 9- Zoning Records

Schedule Number	Record Title/Description	Retention Period	Media Type	For use by Auditor or OHS-LGRP	RC-3 Required by OHS-LGRP
ZON-001	Village Zoning Ordinance & Amendments	Permanent	Paper		
ZON-002	Village Zoning Maps	Discard after revisions	Paper/Wall Poster		
ZON-003	Zoning/Planning Commission/Hearing Minutes	Permanent	Paper		
ZON-004	Zoning Permit Applications	15 years	Paper		
ZON-005	Receipts for Permits Issued	15 years	Paper		
ZON-006	Requests for Zoning Changes/Variances (reflected on zoning map)	15 years	Paper		
ZON-007	Annexation Documents (reflected on zoning map)	15 years	Paper		
ZON-008	County Reports of Permits Issued	10 years	Paper		