



Ohio History Connection  
 State Archives of Ohio  
 Local Government Records Program  
 800 E. 17<sup>th</sup> Avenue  
 Columbus, OH 43211-2474

OHIO HISTORY CONNECTION

JUN 30 2020

STATE AND LOCAL  
 GOVERNMENT RECORDS

## RECORDS RETENTION SCHEDULE (RC-2) – Part 1

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

### Section A: Local Government Unit

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

Clermont County Water Resources Department - Administration 8521, 8523, 8530, 8550  
 (Local government entity) (Unit)

*Lyle Bloom*  
 (Signature of responsible official)

Lyle Bloom  
 (Name)

Director  
 (Title)

06-02-2020  
 (Date)

### Section B: Records Commission

Clermont County Records Commission (513) 735-8660  
 Records Commission (Telephone number)

2425 Clermont Center Drive Batavia 45103 Clermont  
 (Address) (City) (Zip code) (County)

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

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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.

*Erica H. Thompson*  
 Records Commission Chair Signature

6/23/20  
 Date

### Section C: Ohio History Connection - State Archives

*Amrisha Riddle* Local Government Records Archivist 7/6/20  
 Signature Title Date

### Section D: Auditor of State

Signature Date

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

# Records Retention Schedule

Clermont County Water Resources Department – Administration 8521, 8523, 8530, 8550  
 (Local government entity) (Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS-LGRP	(6) RC-3 Required by OHS-LGRP
8523-01	Bids (Unsuccessful)	Retain 3 Fiscal Years After Letting of Contract, Provided Audited	Paper/Electronic	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	<input type="checkbox"/>
8523-02	Complaints	Retain 2 Years After End of Fiscal Year Then Destroy, Provided Settled	Paper/Electronic		<input type="checkbox"/>
8523-04	Job Descriptions	Retain Until Superseded	Paper/Electronic		<input type="checkbox"/>
8523-05	Expense Records –Purchase Orders, Requisitions, Invoices, Billing Records, Receipt Documents and Travel Expense Records	Maintained in County's accounting system per Auditor's retention schedule	Paper/Electronic		<input type="checkbox"/>
8523-06	Treatment Plant Permits	Retain Until Superseded	Paper/Electronic		<input type="checkbox"/>
8523-07	Certifications Record	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
8523-10	Policies & Programs (Master Plan)	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
8523-11	Lift Station Records	Five Years	Paper/Electronic		<input type="checkbox"/>
8523-12	Regulatory Agency Files	Three Years	Paper/Electronic		<input type="checkbox"/>
8523-13	Safety & Loss Prevention Reports	Three Years	Paper/Electronic		<input type="checkbox"/>
8523-14	Safety Committee Records	Three Years	Paper/Electronic		<input type="checkbox"/>
8523-15	Safety Training Records	Maintained as part of Personnel File per HR's retention schedule	Paper/Electronic		<input type="checkbox"/>
8523-16	Sewer & Water Improvement Plans– Data, Surveys, Blueprints, Reports and Tracings	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
8523-17	Sewer & Water Improvement Plans – Petitions, Resolutions, Cost Estimates	5 years after construction is complete	Paper		<input type="checkbox"/>
8523-18	Daily/Monthly Logs, Monthly Operating Reports, Violations/Correction Orders	Five Years	Paper/Electronic		<input type="checkbox"/>

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8523-19	Water Usage Reports	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
8523-20	Wellfield Files	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
8523-21	Backflow Preventer Tests (Inspection Reports)	Two Years	Paper/Electronic		<input type="checkbox"/>
8523-23	Budget Files	5 years	Paper/Electronic		<input type="checkbox"/>
8523-27A	Fire Hydrant Records – Construction Drawings Includes plans and Installation records	Maintain permanently as part of Water/Sewer Main Installations or Water/Sewer Construction Projects	Paper/Microfilm		<input type="checkbox"/>
8523-27B	Fire Hydrant Records – Inspections Maintained in GIS database	Until hydrant is removed from service	Electronic		<input type="checkbox"/>
8523-29	Limited Tap-In	Permanent	Paper/Microfilm		<input type="checkbox"/>
8523-31	Payroll Worksheets – Employee Timesheets, Leave Requests, Individual Payroll Deduction Reports, OBES Reports	Timesheets and Overtime Records maintained 3 Years onsite  Maintained in County's accounting system per Auditor's retention schedule	Paper/Electronic		<input type="checkbox"/>
8523-32	Sewer Tapper Installer Bonds	3 years after expiration or cancellation	Paper/Electronic		<input type="checkbox"/>
8523-33	Agreements/Contracts – Not related to Water/Sewer connections or construction	8 years after completion	Paper/Electronic		<input type="checkbox"/>
8523-34	Sludge Hauling and Disposal Records	20 years	Paper		<input type="checkbox"/>
8523-35	Locate Records	Maintained in State's database – retention controlled by the State	Paper/Electronic		<input type="checkbox"/>
8523-36	Annual Water Quality Report	10 years	Paper/Electronic		<input type="checkbox"/>
8523-37	Financial Reports – Sewer District	Prior to 2013, maintained permanently. Beginning in 2013, maintained as part of CAFR by Auditor	Paper/Microfilm		<input type="checkbox"/>

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8523-38	Purchase Authorizations – Trust Funds	Until the year of sale/maturity is audited	Paper/Electronic		<input type="checkbox"/>
8523-39	Sewer District Audit Work Papers	20 years	Paper/Electronic		<input type="checkbox"/>
8523-40	Trust Funds – Sewer District: Annual records of trust statements	15 years after closed	Electronic		<input type="checkbox"/>
8523-41	Water/Sewer Rate Studies	10 years after superseded	Paper/Electronic		<input type="checkbox"/>
8523-42	Work Orders – Includes work orders for maintenance and repair. Maintained electronically in work order management system	3 years	Electronic		<input type="checkbox"/>

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