



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

OHIO HISTORY CONNECTION

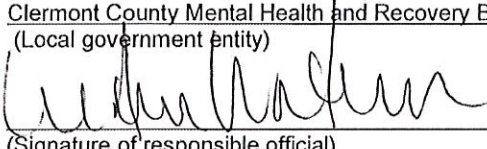
DEC 14 2022

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


Clermont County Mental Health and Recovery Board (Local government entity)	5200 (Unit)		
	Lee Ann Watson (Name)	Director (Title)	11/29/22 (Date)
(Signature of responsible official)			

Section B: Records Commission

Clermont County Records Commission Records Commission	(513) 735-8660 (Telephone number)		
2425 Clermont Center Drive (Address)	Batavia (City)	45103 (Zip code)	Clermont (County)

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

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.

	12-5-22
Records Commission Chair Signature	Date

Section C: Ohio History Connection - State Archives

	Government Records Archivist	12/22/2022
Signature	Title	Date

Section D: Auditor of State

Signature	Date
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**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**

Schedule of Records Retention and Disposition

Clermont County Mental Health and Recovery Board

(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
5200-01	Agency Files – Materials relating to agencies providing services under contract with Board, including contracts, agency reports, evaluations, Quality Assurance plans, and related correspondence	Permanent	Paper/Microfilm		<input type="checkbox"/>
5200-02	Annual Comprehensive Plan – Annual Community Plans, ODMH and ODADAS for all services to be provided; includes plans, budgets, etc.	Permanent	Paper/Microfilm		<input type="checkbox"/>
5200-04	Audit Reports – Annual agency and State Auditor examinations	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
5200-07	Board Member Information	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
5200-08	Board Policy/Procedure – Includes contract standards, personnel policy/procedure and operations policy/procedure	Once superseded, retain 5 years	Paper/Electronic		<input type="checkbox"/>
5200-09	Civil Commitment Papers	6 years	Paper/Electronic		<input type="checkbox"/>
5200-10	Contracts	8 years after completion	Paper/Electronic		<input type="checkbox"/>
5200-11	Financial Records – Accounting records documenting annual budget expenditure and receipts	5 years, provided audited	Paper/Electronic		<input type="checkbox"/>
5200-15	Insurance Policies	Permanent	Paper/Electronic		<input type="checkbox"/>
5200-18	Litigation Files —Rulings, findings, briefs and any other official documentation related to Board litigation	Permanent	Paper/Electronic		<input checked="" type="checkbox"/>
5200-19	Client Demographics and Claim Files —Records pertaining to clients; maintained electronically	10 years	Electronic		<input type="checkbox"/>
5200-20	Minutes of the Board – Record of meetings, resolutions, etc., which document policy and decision of the Board	Permanent	Paper/Microfilm		<input checked="" 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

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(Local government entity)

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5200-22	Personnel Files – Including application, evaluations, disciplinary actions and other related information	20 years after termination	Paper/Electronic		<input type="checkbox"/>
5200-23	Publications – Departmental newsletters, brochures and manuals	Until superseded, appraise for historical value	Paper/Electronic		<input type="checkbox"/>
5200-24	State Reports – All records pertaining to various reports compiled for State review	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>