



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

OHIO HISTORY CONNECTION

JUN 08 2018

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

Office of Management and Budget – Customer Service
 (Local government entity)

8524
 (Unit)

Pat Shreve
 (Signature of responsible official)

Pat Shreve
 (Name)

Supervisor
 (Title)

4.18.18
 (Date)

Section B: Records Commission

Clermont County Records Commission
 Records Commission

(513) 735-8660
 (Telephone number)

289 East Main Street
 (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.

Edison H. Humphrey
 Records Commission Chair Signature

6/6/18

Date

Section C: Ohio Historical Society - State Archives

Amy C. Shinn Govt. Rec. Archivist
 Signature Title

6/15/18
 Date

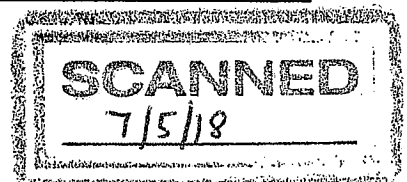
Section D: Auditor of State

Martin E. Mub
 Signature

6-25-18

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**



Schedule of Records Retention and Disposition

OMB-Customer Service

8524

(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
98-1A	General Application for Permit & plan (water & sewer tap records)	Migrate or maintain as necessary until no longer of administrative, fiscal or legal value in electronic format	Electronic or All Other Media		<input type="checkbox"/>
98-1B	General Application for Permit & plan (water & sewer tap records)	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
98-2A	Applications for Water & Sewer Service	Migrate or maintain as necessary until no longer of administrative, fiscal or legal value in electronic format	Electronic or All Other Media		<input type="checkbox"/>
98-2B	Applications for Water & Sewer Service	Permanent	Paper/Microfilm		<input checked="" type="checkbox"/>
98-3	Billing Adjustments	Until End of Fiscal Year Audit	Paper/Electronic		<input type="checkbox"/>
98-4	Cash Receipts	2 Years	Paper/Electronic		<input type="checkbox"/>
98-5	Customer Transaction	Until End of Fiscal Year Audit	Paper/Electronic		<input type="checkbox"/>
98-6	Daily Posting Summary	Until End of Fiscal Year Audit	Paper/Electronic		<input type="checkbox"/>
98-7	Daily Receipt Record	4 Years after End of Fiscal Year Audit	Paper/Electronic		<input type="checkbox"/>
98-8	Work Orders	Until End of Fiscal Year Audit	Paper/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.

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OMB-Customer Service

8524

(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
98-9	Billing Summaries	Until End of Fiscal Year Audit	Paper/Electronic		<input type="checkbox"/>
98-10	Account Transaction Record	1 Year after Fiscal Year Audit	Paper/Electronic		<input type="checkbox"/>
98-11	Certification Records (Copy & Computer printout)	Until Certification Expires Original at the Auditors	Paper/Electronic		<input type="checkbox"/>
98-12	Bankruptcy Records	Until end of fiscal year audit, after lien is paid or kept until discharged	Paper/Electronic		<input type="checkbox"/>
98-13	Customer Database – Includes name, billing information, service address and other customer information	Continually updated	Paper/Electronic		<input type="checkbox"/>