



Ohio History Connection
State Archives of Ohio
Local Government Records Program
800 E. 17th Avenue
Columbus, Ohio 43211-2474
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www.ohiohistory.org/lgr

OHIO HISTORY CONNECTION

DEC 09 2021

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 and Section B must be filled out and signed by local government before submission to the State Archives

Section A: Local Government Unit

Alcohol, Drug Addiction and Mental Health Services Board of Cuyahoga County, Ohio

(Local Government Entity)

(Unit)

Scott S. Osiecki

Scott S. Osiecki

Chief Executive Officer

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

Cuyahoga County Records Commission

216-443-7250

3951 Perkins Ave.

Cleveland

Ohio 44114

(Telephone Number)

Cuyahoga

(Address)

(City)

(Zip Code)

(County)

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

jun@adamhsc.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.

Juliana B. Celina Ph.D. Acting Chair

12-8-21

Records Commission Chair Signature

Date

Section C: Ohio History Connection - State Archives

Amanda Rindler

Digitally signed by Amanda
Rindler
Date: 2021.12.21 13:54:15 -05'00'

Local Government Records Archivist

12/21/2021

Signature

Title

Date

Section D: Auditor of State

Martin E. Meeks

Digitally signed by Martin E.
Meeks
Date: 2021.12.29 10:19:27 -05'00'

Records Manager

Signature

Title

Date

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYExecutive
(Supersedes all other retention schedules)

(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
21-1	Board Member Information <ul style="list-style-type: none"> Documentation on individual appointments and terms served on the Board Oaths of Office 	Permanent	Paper		<input checked="" type="checkbox"/>
21-2	Board of Directors Committee and Regular Meeting Minutes, Agendas and Resolutions	Permanent	Paper		<input checked="" type="checkbox"/>
21-3	Board of Directors Agenda Process Sheets	Permanent	Paper		<input checked="" type="checkbox"/>
21-4	Executive Correspondence, dealing with significant aspects of the administration of the ADAMHS Board offices, information concerning Board policies, programs, fiscal and personnel matters	2 years	Paper or electronic		<input type="checkbox"/>
21-5	General Correspondence (All Depts) <ul style="list-style-type: none"> Internal correspondence (letters, memos, e.g.) Correspondence from individuals, providers, companies, and organizations Requesting information Not attempting to influence policy Emails (all types) 	1 year	Paper or electronic		<input type="checkbox"/>
21-6	Meeting Notices-Notifying Public of Time and Place of Public Meeting	1 year	Paper or electronic		<input type="checkbox"/>
21-7	Monthly and Weekly Reports (All Depts)	1 year	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYExecutive
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(Unit)

	<ul style="list-style-type: none"> • That document status of ongoing projects and issues • That advise supervisors of events and issues 				
21-8	Strategic Plans	Permanent	Paper		<input checked="" type="checkbox"/>
21-9	Staff Meeting Minutes and Agendas (All Depts) <ul style="list-style-type: none"> • Minutes and supporting records documenting internal policy decisions 	2 years	Paper or electronic		<input type="checkbox"/>
21-10	Terminated Employees Data/Work Files (All Depts)	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-11	Transient Documents (All Depts) <ul style="list-style-type: none"> • Phone messages • Drafts • Other limited documents which serve to convey information of temporary importance in lieu of oral communication 	Until no longer of administrative value, then destroy	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYExternal Affairs/Education&Training/Special Projects
(Supersedes all other retention schedules)

(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
21-1	ADAMHS Board Website (Archived)	Until information is superseded , obsolete or replaced	Electronic		<input type="checkbox"/>
21-2	Annual Budget Book	Permanent	Paper		<input checked="" type="checkbox"/>
21-3	Annual Community Plan	Permanent	Paper		<input checked="" type="checkbox"/>
21-4	Annual Report	Permanent	Paper		<input checked="" type="checkbox"/>
21-5	Audiovisual, Training, and Public Relations Materials, including social media	Until information is superseded , obsolete or replaced	Paper or electronic		<input type="checkbox"/>
21-6	Faith-Based Initiative Annual Report	Permanent	Paper		<input checked="" type="checkbox"/>
21-7	Faith-Based Initiative Provider Files: records relating to agencies providing services under contract with ADAMHS Board, including agency reports, evaluations, quality assurance plans, and related correspondence	6 years	Paper or electronic		
21-8	General Correspondence (All Depts) <ul style="list-style-type: none"> • Internal correspondence (letters, memos, e.g.) • Correspondence from individuals, providers, 	1 year	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYExternal Affairs/Education&Training/Special Projects
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(Local Government Entity)

(Unit)

	companies, and organizations <ul style="list-style-type: none"> • Requesting information • Not attempting to influence policy Emails (all types)				
21-9	Mailing Lists (email and mail)	Until updated, superseded, or obsolete	Paper or electronic		<input type="checkbox"/>
21-10	Monthly and Weekly Reports (All Depts) <ul style="list-style-type: none"> • That document status of ongoing projects and issues • That advise supervisors of events and issues 	1 year	Paper or electronic		<input type="checkbox"/>
21-11	Photo, Video & Information Release Form	3 years	Paper or electronic		<input type="checkbox"/>
21-12	Public Records Requests	3 years	Paper or electronic		<input type="checkbox"/>
21-13	Service Directory	Permanent	Paper		<input checked="" type="checkbox"/>
21-14	Staff Meeting Minutes and Agendas (All Depts) <ul style="list-style-type: none"> • Minutes and supporting records documenting internal policy decisions 	2 years	Paper or electronic		<input type="checkbox"/>
21-15	Terminated Employees Data/Work Files (All Depts)	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-16	Training Sign-in Sheets: non-staff training	3 years	Paper or electronic		<input type="checkbox"/>
21-17	Transient Documents (All Depts) <ul style="list-style-type: none"> • Phone messages • Drafts • Other limited documents which serve to convey 	Until no longer of administrative value,	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.***ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTY****External Affairs/Education&Training/Special Projects
(Supersedes all other retention schedules)**

(Local Government Entity)

(Unit)

	information of temporary importance in lieu of oral communication	then destroy			
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Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYFinance & Claims
(Supersedes all other retention schedules)

(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
21-1	Account/Financial Records	5 years	Paper or electronic		<input type="checkbox"/>
21-2	Claims Files	6 years	Electronic		<input type="checkbox"/>
21-3	General Correspondence (All Depts) <ul style="list-style-type: none"> • Internal correspondence (letters, memos, e.g.) • Correspondence from individuals, providers, companies, and organizations • Requesting information • Not attempting to influence policy • Emails (all types) 	1 year	Paper or electronic		<input type="checkbox"/>
21-4	Monthly and Weekly Reports (All Depts) <ul style="list-style-type: none"> • That document status of ongoing projects and issues • That advise supervisors of events and issues 	1 year	Paper or electronic		<input type="checkbox"/>
21-5	Provider Data Error Submission Reports	7 years	Electronic		<input type="checkbox"/>
21-6	Recall Reports	5 years	Electronic		<input type="checkbox"/>
21-7	Remittance Advices (Pass-through of Providers)	7 years	Electronic		<input type="checkbox"/>
21-8	Staff Meeting Minutes and Agendas (All Depts)	2 years	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYFinance & Claims
(Supersedes all other retention schedules)

(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
	<ul style="list-style-type: none"> Minutes and supporting records documenting internal policy decisions 				
21-9	Terminated Employees Data/Work Files (All Depts)	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-10	Title XX Records	5 years	Paper or electronic		<input type="checkbox"/>
21-11	Transient Documents (All Depts) <ul style="list-style-type: none"> Phone messages Drafts Other limited documents which serve to convey information of temporary importance in lieu of oral communication 	Until no longer of administrative value, then destroy	Paper or electronic		<input type="checkbox"/>
21-12	Trust Funds	7 years	Paper or electronic		<input type="checkbox"/>
21-13	UCI Request Forms	5 years	Electronic		<input type="checkbox"/>
21-14	Vouchers	7 years	Paper or electronic		<input type="checkbox"/>
21-15	Warrants	7 years	Paper or electronic		<input type="checkbox"/>
21-16	Weekly Error and Processing Logs for ADAMHS Board	7 years	Electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYIT, QI/Evaluation & Research
(Supersedes all other retention schedules)

(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
21-1	Annual Provider Client Satisfaction Surveys	5 years	Paper or electronic		<input type="checkbox"/>
21-2	Annual Provider QI Plans	5 years	Paper or electronic		<input type="checkbox"/>
21-3	AOD Performance Outcomes Reports	5 years	Paper or electronic		<input type="checkbox"/>
21-4	AOD Quarterly Provider QI Reports	5 years	Paper or electronic		<input type="checkbox"/>
21-5	AOD Quarterly Provider Waitlists	5 years	Paper or electronic		<input type="checkbox"/>
21-6	General Correspondence (All Depts) <ul style="list-style-type: none"> • Internal correspondence (letters, memos, e.g.) • Correspondence from individuals, providers, companies, and organizations • Requesting information • Not attempting to influence policy • Emails (all types) 	1 year	Paper or electronic		<input type="checkbox"/>
21-7	IT Equipment Inventories (documents showing list of equipment with their barcode numbers)	3 years after disposal	Paper or electronic		<input type="checkbox"/>
21-8	IT Equipment Warranties	Life of the equipment	Paper or electronic		<input type="checkbox"/>
21-9	Letters of Support	3 years	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYIT, QI/Evaluation & Research
(Supersedes all other retention schedules)

(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
21-10	Needs Assessment	20 years	Paper or electronic		<input type="checkbox"/>
21-11	Offsite Backup Data	1 year	Electronic		<input type="checkbox"/>
21-12	Outcomes Information	5 years	Paper or electronic		<input type="checkbox"/>
21-13	Periodic Reports	5 years	Paper or electronic		<input type="checkbox"/>
21-14	Quotes for IT Equipment and/or Services	Until no longer of administrati ve value	Paper or electronic		<input type="checkbox"/>
21-15	RFP/RFQ/RFI	8 years (ORC 2305.06)	Paper or electronic		<input type="checkbox"/>
21-16	Security Surveillance Footage	Use for one cycle then reuse provided no pending action	Electronic		<input type="checkbox"/>
21-17	Staff Meeting Minutes and Agendas (All Depts) • Minutes and supporting records documenting internal policy decisions	2 years	Paper or electronic		<input type="checkbox"/>
21-18	Terminated Employees Data/Work Files (All Depts)	Until no longer of administrati ve value	Paper or electronic		<input type="checkbox"/>
21-19	Transient Documents (All Depts) • Phone messages • Drafts • Other limited documents which serve to convey	Until no longer of administrati ve value,	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYIT, QI/Evaluation & Research
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(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
	information of temporary importance in lieu of oral communication	then destroy			

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*

ONLY SIX PAGES.

ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYAdministrative/Human Resource/Clients' Rights/Risk
(Supersedes all other retention schedules)

(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
21-1	Accruals <ul style="list-style-type: none"> • Vacation Time • Sick Time • Compensatory or Flex Time 	Until no longer of administrative value; final accrual report kept in permanent personnel file	Paper or electronic but paper for final accrual report		<input type="checkbox"/>
21-2	Annual Clients' Rights Report	10 Years	Paper or electronic		<input type="checkbox"/>
21-3	Arbitration Decisions	Permanent	Paper		<input type="checkbox"/>
21-4	Benefits Offered, including providers <ul style="list-style-type: none"> • Medical/Prescription • Dental/Vision • Life Insurance • Flexible Spending Accounts • OPERS • Deferred Compensation 	6 years	Paper or electronic		<input type="checkbox"/>
21-5	Bulletins, Posters, and Notices to Employees	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-6	Bureau of Workers' Compensation Lost Time Claims: claims where eight or more calendar days are lost from work due to a work-related accident or illness (ORC 4123.52)	10 years after final activity	Paper or electronic		<input type="checkbox"/>
21-7	Bureau of Workers' Compensation, Medical Only Claims: claims where seven or	10 years after final activity	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYAdministrative/Human Resource/Clients' Rights/Risk
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(Local Government Entity)

(Unit)

	fewer calendar days are lost from work due to a work-related accident or illness (ORC 4123.52) (HR)				
21-8	Claims and Litigation Files, including: <ul style="list-style-type: none"> • Federal and state court cases • Ohio Civil Rights Commission • EEOC • Workers' Compensation • Ohio Ethics Commission 	5 years after case is closed and claims exhausted	Paper or electronic		<input type="checkbox"/>
21-9	Collective Bargaining Agreements	Permanent	Paper		<input type="checkbox"/>
21-10	Continuing Education Certifications, Seminars, Training Attendance Records	Permanent	Paper		<input type="checkbox"/>
21-11	Contracts, including for <ul style="list-style-type: none"> • Mental health, prevention, and addiction services • Operational contracts • Memoranda of understanding • Consulting • Professional services • Leases 	8 years after expiration (ORC 2305.06)	Paper or electronic		<input type="checkbox"/>
21-12	Deeds for Real Property Owned by the ADAMHS Board	Permanent	Paper		<input checked="" type="checkbox"/>
21-13	Directories, Lists, and Rosters, containing, for example, employee or department: <ul style="list-style-type: none"> • Names • Titles • Phone Numbers • Email addresses • Assignments 	Until superseded, obsolete, or replaced	Paper or electronic		<input type="checkbox"/>
21-14	Drug/Alcohol Test Results: results of drug and/or alcohol tests taken by employees	6 years	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYAdministrative/Human Resource/Clients' Rights/Risk
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21-15	Employee Background and Reference Check	6 years	Paper or electronic		<input type="checkbox"/>
21-16	Employee Benefits Records	6 years	Paper or electronic		<input type="checkbox"/>
21-17	Employee Incident/Accident Reports: personal injury (not Workers' Comp claim)	6 years	Paper or electronic		<input type="checkbox"/>
21-18	Employee Medical Files <ul style="list-style-type: none"> FMLA request forms Doctor's notes 	6 years	Paper or electronic		<input type="checkbox"/>
21-19	Employee Payroll Files and Direct Deposit Info <ul style="list-style-type: none"> W-4 form Deferred compensation Credit union enrollment Union membership application Verification for employment for loans Garnishments Child support payments 	Permanent	Paper		<input type="checkbox"/>
21-20	Ethics Forms	Permanent	Paper		<input type="checkbox"/>
21-21	General Correspondence (All Depts) <ul style="list-style-type: none"> Internal correspondence (letters, memos, e.g.) Correspondence from individuals, providers, companies, and organizations Requesting information Not attempting to influence policy Emails (all types) 	1 year	Paper or electronic		<input type="checkbox"/>
21-22	Grant Records	3 years after grant expires	Paper or electronic		<input type="checkbox"/>
21-23	Grievances/Complaints Database	10 years	Electronic		

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYAdministrative/Human Resource/Clients' Rights/Risk
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					<input type="checkbox"/>
21-24	Grievances/Complaints Resolution Letters, including <ul style="list-style-type: none"> • Client complaints • Correspondence with clients & providers • Investigatory documents 	10 years	Paper or electronic		<input type="checkbox"/>
21-25	Immigration Form I-9, Employment Eligibility Verification	3 years after date of hire or 1 year after termination whichever is later	Paper or electronic		<input type="checkbox"/>
21-26	Incident Reports & Major Unusual Incidents (MUIs)	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-27	Insurance Policies for ADAMHS Board	2 years after expiration of policy, provided all claims settled and appeals exhausted (ORC 2305.10)	Paper or electronic		<input type="checkbox"/>
21-28	Insurance Quotes and Renewal Information	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-29	Job Descriptions <ul style="list-style-type: none"> • Description of employee positions • Job classes 	Until revised, superseded, or obsolete	Paper or electronic		<input type="checkbox"/>
21-30	Job Postings <ul style="list-style-type: none"> • Records created during recruitment process. 	2 years (29 CFR 1602.14; 29 CFR 1627.3)	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYAdministrative/Human Resource/Clients' Rights/Risk
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	<ul style="list-style-type: none"> • Employment applications, not hired • Resumes, not hired • Background checks of applicants, not hired • Drug tests of applicants, not hired 				
21-31	Labor Union Dues Records <ul style="list-style-type: none"> • Correspondence • Copies of checks 	6 years	Paper or electronic		<input type="checkbox"/>
21-32	Layoff Records: documents required to determine potential layoffs and displacement rights into other positions	6 years	Paper or electronic		<input type="checkbox"/>
21-33	Legal Opinions and Memoranda, from attorney representing the ADAMHS Board advising ADAMHS Board on legal issues	Permanent	Paper		<input checked="" type="checkbox"/>
21-34	Monthly and Weekly Reports (All Depts) <ul style="list-style-type: none"> • That document status of ongoing projects and issues • That advise supervisors of events and issues 	1 year	Paper or electronic		<input type="checkbox"/>
21-35	Payroll Records	Permanent	Paper		<input type="checkbox"/>
21-36	Personnel Files <ul style="list-style-type: none"> • Application • Appointment letter • Job description • Resume • Hiring papers • Evaluations • Correspondence noting salary changes • Grievances/Disciplinary actions • Final leave accrual report 	Permanent	Paper		<input type="checkbox"/>
21-37	Personnel Handbook	Permanent	Paper		<input type="checkbox"/>

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SERVICES BOARD OF CUYAHOGA COUNTYAdministrative/Human Resource/Clients' Rights/Risk
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21-38	Policies and Procedures <ul style="list-style-type: none"> • Current • Past (superseded, replaced, rescinded) 	Permanent	Paper		<input type="checkbox"/>
21-39	Reimbursement Requests and Related Documents <ul style="list-style-type: none"> • Trainings, seminars, and/or conferences • Professional Licenses • Tuition reimbursement 	6 years	Paper or electronic		<input type="checkbox"/>
21-40	Sign-In Sheets <ul style="list-style-type: none"> • All Staff Meetings • All Managers Meetings • All Staff Trainings 	3 years	Paper or electronic		<input type="checkbox"/>
21-41	Staff Lunch/Whereabouts Sheets	3 years	Paper or electronic		<input type="checkbox"/>
21-42	Staff Meeting Minutes and Agendas (All Depts) <ul style="list-style-type: none"> • Minutes and supporting records documenting internal policy decisions 	2 years	Paper or electronic		<input type="checkbox"/>
21-43	Timekeeping System Reports <ul style="list-style-type: none"> • Leave requests 	3 years	Paper or electronic		<input type="checkbox"/>
21-44	Terminated Employees Data/Work Files (All Depts)	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-45	Transient Documents (All Depts) <ul style="list-style-type: none"> • Phone messages • Drafts • Other limited documents which serve to convey information of temporary importance in lieu of oral communication 	Until no longer of administrative value, then destroy	Paper or electronic		<input type="checkbox"/>
21-46	Visitor Sign-in Sheets	3 years	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYClinical and Programs
(Supersedes all other retention schedules)

(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
21-1	Adult Care Facility Files, including complaints	6 years	Paper or electronic		<input type="checkbox"/>
21-2	Adult Residence Certification Standards for Permanent Housing and Supported Housing Sites	6 years	Paper or electronic		<input type="checkbox"/>
21-3	Audit Reports	6 years	Paper or electronic		<input type="checkbox"/>
21-4	Authorizations to Release Protected Health Information, Privacy Notices and HIPAA-related records	6 years	Paper or electronic		<input type="checkbox"/>
21-5	Community Capital Applications	6 years	Paper or electronic		<input type="checkbox"/>
21-6	Client Case Info/Files <ul style="list-style-type: none"> • From agency • From service coordination team 	20 years after last contact with consumer	Paper or electronic		<input type="checkbox"/>
21-7	Concept/Position Papers and Plans	10 years	Paper or electronic		<input type="checkbox"/>
21-8	Coordinated Adult Residential Referral Applications	6 years	Paper or electronic		<input type="checkbox"/>
21-9	General Correspondence (All Depts) <ul style="list-style-type: none"> • Internal correspondence (letters, memos, e.g.) • Correspondence from individuals, providers, companies, and organizations • Requesting information 	1 year	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYClinical and Programs
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(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
	<ul style="list-style-type: none"> Not attempting to influence policy Emails (all types) 				
21-10	Monthly and Weekly Reports (All Depts) <ul style="list-style-type: none"> That document status of ongoing projects and issues That advise supervisors of events and issues 	1 year	Paper or electronic		<input type="checkbox"/>
21-11	Probate Court/Involuntary Commitment (resulted in commitment)	20 years after last contact with consumer	Paper or electronic		<input type="checkbox"/>
21-12	Probate Court/Involuntary Commitment (did not result in hearing and/or commitment)	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-13	Program Forms	Until no longer of administrative value	Paper or electronic		<input type="checkbox"/>
21-14	Provider/Agency Service Plans	Permanent	Paper		<input type="checkbox"/>
21-15	Reports. Official <ul style="list-style-type: none"> Programs/System OhioMHAS mandated 	10 years	Paper or electronic		<input type="checkbox"/>
21-16	Residential Care Facility Census Reports	3 years	Paper or electronic		<input type="checkbox"/>
21-17	Residential Care Facility Licensure Applications	3 years	Paper or electronic		<input type="checkbox"/>
21-18	Staff Meeting Minutes and Agendas (All Depts) <ul style="list-style-type: none"> Minutes and supporting records documenting internal policy decisions 	2 years	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.***ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTY****Clinical and Programs
(Supersedes all other retention schedules)**

{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
21-19	Surveys	10 years	Paper or electronic		<input type="checkbox"/>
21-20	Terminated Employees Data/Work Files (All Depts)	Until no longer of administrati ve value	Paper or electronic		<input type="checkbox"/>
21-21	Transient Documents (All Depts) <ul style="list-style-type: none"> • Phone messages • Drafts • Other limited documents which serve to convey information of temporary importance in lieu of oral communication 	Until no longer of administrati ve value, then destroy	Paper or electronic		<input type="checkbox"/>
21-22	WRAP Around Program Application	6 years	Paper or electronic		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
SERVICES BOARD OF CUYAHOGA COUNTYCompliance
(Supersedes all other retention schedules)

(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
21-1	Annual Compliance Review Report	Permanent	Paper	Paper	<input checked="" type="checkbox"/>
21-2	Compliance Review Checklist	6 years	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-3	Compliance Review Report	6 years	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-4	Compliance Summaries	6 years	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-5	Corrective Action Plan	6 years	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-6	General Correspondence (All Depts) <ul style="list-style-type: none"> Internal correspondence (letters, memos, e.g.) Correspondence from individuals, providers, companies, and organizations Requesting information Not attempting to influence policy Emails (all types) 	1 year	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-7	Monthly and Weekly Reports (All Depts) <ul style="list-style-type: none"> That document status of ongoing projects and issues That advise supervisors of events and issues 	1 year	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-8	Notification of Compliance Review	6 years	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-9	Provider Response & Documents	6 years	Paper or electronic	Paper or electronic	

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*ALCOHOL, DRUG ADDICTION AND MENTAL HEALTH
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(Local Government Entity)

(Unit)

					<input type="checkbox"/>
21-10	Staff Meeting Minutes and Agendas (All Depts) <ul style="list-style-type: none"> Minutes and supporting records documenting internal policy decisions 	2 years	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-11	Terminated Employees Data/Work Files (All Depts)	Until no longer of administrative value	Paper or electronic	Paper or electronic	<input type="checkbox"/>
21-12	Transient Documents (All Depts) <ul style="list-style-type: none"> Phone messages Drafts Other limited documents which serve to convey information of temporary importance in lieu of oral communication 	Until no longer of administrative value, then destroy	Paper or electronic	Paper or electronic	<input type="checkbox"/>