

(1) Schedule Number	(2) Record Title & Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or OHS- LGRP	(6) RC-3 Required by OHS- LGRP
GEN-21	<p>General Correspondence</p> <p>These records do not pertain to a specific project or part of another record series, and they are often organized chronologically or by correspondent's name. General correspondence may exist in a variety of formats, including memos, letters, notes and electronic mail messages.</p> <p>NOTE: Correspondence pertaining to a specific project or another record series should be filed with that project or record series.</p>	1 year	Paper / Electronic		<input type="checkbox"/>
GEN-22	<p>Grant files</p> <p>These records document grants from federal or other sources, such as the Gates Foundation, the Wean Foundation and any others. They may include session documents, financial materials, meeting notes, the grant application, contracts, and final reports.</p>	5 years	Paper		<input type="checkbox"/>
GEN-23	<p>Hyperlinks - website</p> <p>These records are informal and temporary in nature and are used to link information, such as bookmarks, and RSS feeds.</p>	Until no longer useful	Electronic		<input type="checkbox"/>
GEN-24	<p>Instruction manuals</p> <p>These records include any documentation that instructs how to assemble, use, operate, order parts for and repair a piece of equipment, furniture or other items. They may include AV equipment, typewriter, desk, shelving, security gates, and digital camera. Retain until the Library no longer owns the item.</p> <p>NOTE: Transfer Technology related warranties to the Technology Administrator. All other warranties should be transferred to the Director.</p>	Until no longer useful	Paper		<input type="checkbox"/>
GEN-25	<p>Key logs</p> <p>These records manage the inventory and distribution of library keys, such as keys for building doors. This may include an inventory sheet, lost key documentation and other related documents.</p>	1 year	Paper		<input type="checkbox"/>

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GEN-26	Labels These records are used to convey a discrete piece of information, such as call number, bar codes, genre stickers, delivery labels, shelf labels and Clevnet labels.	Until no longer useful	Paper		<input type="checkbox"/>
GEN-27	Library Historical Files These records document the history of the library. These files may include scrapbooks, photographs, newspaper clippings, memorabilia, and flyers from various events.	Permanent	Paper		<input type="checkbox"/>
GEN-28	Legal opinions These records consist of correspondence with the attorney who provided legal counsel to the Library. Retain until date is superseded or obsolescence of the opinion.	5 years	Paper / Electronic		<input type="checkbox"/>
GEN-29	Litigation files These records document any litigation to which the Library is a party. They may include dispositions, transcripts, decision, police reports, correspondence, data, exhibits, research materials, reports, press releases, media clippings and other related records.	5 years	Paper / Electronic		<input type="checkbox"/>
GEN-30	Meeting Records - Internal These are records of meetings entirely or primarily consisting of Library staff. They may be regularly scheduled meetings, such as Morning meetings, Supervisor meetings, Department meetings, or ad hoc committee meetings, such as Web Site Committee, Strategic Planning. Records may include agendas, meeting minutes, distribution materials, and other related records.	1 year	Electronic		<input type="checkbox"/>
GEN-31	Patron Incident & Security Files These records document patrons who have received disciplinary action or prohibitory sanctions. They are organized by patron name and consist of letters sent to patrons describing the unacceptable activity and the prohibitions on patron privileges. They may also contain correspondence with public safety or patron guardians, including police reports and emergency calls.	5 years	Paper		<input type="checkbox"/>

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GEN-32	Payment receipt This receipt should be given to the patron when payment is made.	Until no longer useful	Paper		<input type="checkbox"/>
GEN-33	Postal mail - non record Postal mail, letters, flyers, postcards, catalogs or other products sent or received through the postal service that do not meet the criteria of the Ohio Revised Code of a "Record" may be discarded immediately, or when no longer useful. This may include any mail created or received that is not work related (personal) or unsolicited mail (junk mail, catalogs, promotional materials). NOTE: This type of mail can become a record if it is specifically incorporated into other work-related documents. At this point, that particular mail becomes an official record and must be retained in accordance with the retention schedule for that record.	Until no longer useful	Paper		<input type="checkbox"/>
GEN-34	Post It Notes & Notes These are post-its and notes that serve to record information of temporary importance, correspond transient or non-substantive messages or in lieu of brief oral communications. This may include notes taken during a meeting that are for a person's reference, a note to remember something, or a post-it on a book. NOTE: Post-it notes and notes can become a record if it is specifically incorporated into other work-related documents. At this point, that particular post-it or note becomes an official record and must be retained in accordance with the retention schedule for that particular record.	Until no longer useful	Paper		<input type="checkbox"/>
GEN-35	Procedures These records are generally a process or series of steps especially of a practical or mechanical nature involving a particular form of work. They may include circulation check out, reference desk procedures, resurfacing CD-ROMS, etc.	Until no longer useful	Paper / Electronic		<input type="checkbox"/>

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GEN-36	<p>Project files</p> <p>These records contain correspondence, price quotes, schedules, planning documents and any other relevant material relating to a specific project involving Library staff. This may include internal projects, such as installing new shelving, or external projects such as a Volunteer Tax Service.</p>	2 years	Paper / Electronic		<input type="checkbox"/>
GEN-37	<p>Public Program Activity Projects</p> <p>This is an activity project that was part of a public program created or sponsored by the Library and the project was left behind or unclaimed by the attendee of the program.</p>	Until no longer useful	Paper		<input type="checkbox"/>
GEN-38	<p>Public Program Files</p> <p>These records contain documents relating to public programs that provide information and/or activities created or sponsored by the Library such as story time, classes (crafts, knitting, etc.), book discussions, and after school programs. Programs may be presented using streaming video published on the Internet (Library website, YouTube). This may include planning documents, program outline, correspondence, book lists, brochures, supply lists, evaluations, statistical information, presentations, digital recordings and other relevant records.</p> <p>NOTE: This record series does not include registration information (see Public Program Registration).</p>	Until no longer useful	Paper / Electronic		<input type="checkbox"/>
GEN-39	<p>Public Program Registration</p> <p>These records document individuals who registered to attend a public program given by or sponsored by the Library. A sign-up sheet, paper form, or electronic form may be used. It may include name, address, age, and contact information.</p> <p>NOTE: If a registration form is used to serve another purpose, then the record series that describes that purpose may require a RC-3 with the longest retention period taking precedence, however the record remains confidential, such as using the registration form to enter a contest or to keep track of completing activities for a program.</p>	Until no longer useful	Paper / Electronic		<input type="checkbox"/>

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GEN-40	Request - Addition of Library Material These records are requests by patrons for materials they would like to see added to the Library collection. The information contained in these files may include patron name and contact information, library card number, and information about the material requested. Follow up materials may also be included, such as the ordering information and correspondence with the patron.	Until no longer useful	Paper / Electronic		<input type="checkbox"/>
GEN-41	Request for Reconsideration of Library Materials These records document a request by a patron or group of people that the Library discard or reclassify a specific item in the collection and the Library's response, and action, if any.	1 year	Paper / Electronic		<input type="checkbox"/>
GEN-42	Signs These records are informal and temporary in nature and are used to convey information, instructions, announcements or rules. This may include holiday closing,	Until no longer useful	Paper		<input type="checkbox"/>
GEN-43	Strategic Planning documentation These records are used to outline the mission and long-term goals of the Library. A consultant, management team, staff, Board and/or community members may assist in preparing the plans. NOTE: These records are used in developing the final strategic plan (see Strategic Planning - Final Approved Plan). Transfer to the Library Director when no longer useful to the department of origin.	1 year	Paper / Electronic		<input type="checkbox"/>
GEN-44	Voice Mail Messages These records are incoming telephone calls recorded on voice mail systems or answering machines.	Until no longer useful	Electronic		<input type="checkbox"/>

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GEN-45	<p>Volunteer / Community Services Files</p> <p>These records document volunteer or community service workers. They may identify assignment locations, hours worked, background checks, and training related to the job. Records may include an application, signed forms authorizing the release of employee information, correspondence with program officers, timesheets and schedules.</p>	5 years	Paper		<input type="checkbox"/>
GEN-46	<p>Work Schedules</p> <p>These records relate to when an employee is scheduled to work. This may include date and department work schedules, delivering items to patrons (Homebound), and administrators working public service desks.</p>	5 years	Electronic		<input type="checkbox"/>
GEN-47	<p>Waiver Agreements</p> <p>These records document a user's signature agreeing to waive any claims against the library. This includes Friends sponsored events.</p>	5 years	Paper/ Electronic		<input type="checkbox"/>

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HR-01	Application files These records are applications for library jobs; some applications may not be solicited. Retain from date of application.	1 year	Paper		<input type="checkbox"/>
HR-02	Compliance posters These records are required by law to be posted at certain designated work areas, such as labor law posters (federal, state, local), public records policy, concealed weapons, and non-smoking.	Until no longer useful	Paper		<input type="checkbox"/>
HR-03	EAP (employee assistance program) These records include statistical reports and the contract with the local health care agency providing the service. This may include program information, correspondence, and other related records.	2 years	Paper		<input type="checkbox"/>
HR-04	Employee injury records These records consist of any reports of accidents or injuries involving the employee.	30 years	Paper		<input type="checkbox"/>
HR-05	Health plan applications These records include applications for employee benefits, such as health, dental, and vision. Retain while the individual is employed by the library.	1 year	Paper		<input type="checkbox"/>
HR-06	I-9 file These records are Federal I-9 forms, which record verification by employers of identity and immigration status of all new employees. Federal code 8 CFR 274A.2 (1998) requires that employers maintain signed copies of I-9 forms for three years after the date of hire or one year after termination, whichever is later.	3 years	Paper		<input type="checkbox"/>
HR-07	Interview materials for non-hires These records include applications, correspondence, interview notes, and any other materials related to the interview process for job candidates who were not hired for an open position.	1 year	Paper		<input type="checkbox"/>

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HR-08	<p>PERRP (Public Employment Risk Reduction Program)</p> <p>These records include correspondence, reports, Summary of Work Related Injuries & Illnesses (Form 300AP) and other records relating to the administration of this statute.</p>	5 years	Paper		<input type="checkbox"/>
HR-09	<p>Personnel files</p> <p>These records are maintained for each employee and document all human resource related transactions that occurred during the employee's period of active employment. They are used to record employee performance and remuneration, maintain current contact information, and keep track of employee benefits (including retirement). These records document the qualifications possessed by the employee to carry out his/her duties. They include resumes, letters of reference and/or signed release for reference, transcripts, acknowledgement forms, required licenses, notes and ratings from the job interview, the official letter of hire stating position and salary, performance evaluations, any changes to the position and rate of pay for the employee, any disciplinary reviews and outcomes, and requests for change in positions. Retirement records document the eligibility for and determination of retirement benefits. These files include membership applications, notice by the employee of qualifying event, application to receive retirement benefits, any change of name or address forms.</p>	50 years	Paper		<input type="checkbox"/>
HR-10	<p>Withholding forms</p> <p>These records consist of signed federal, state, and local tax withholding forms that are filed with the respective government agencies. May also consist of wage garnishment forms.</p> <p>NOTE: Current form becomes part of personnel financial file (see Personnel Financial Files).</p>	30 days	Paper		<input type="checkbox"/>
HR-11	<p>Workers Compensation files</p> <p>These records document any claims made for workers disability compensation benefits. They may consist of a copy of the report of the incident/injury made by the employee (original is sent to the insurer) and a copy of all reports from the occupational health center. Any litigation is kept in a separate file.</p>	30 years	Paper		<input type="checkbox"/>

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MNT-01	<p>Building Maintenance & Grounds</p> <p>These records relate to the maintenance of the interior and exterior including the grounds for the Library, such as cleaning, window washing, regular service calls, gutter cleaning, and landscaping. They may include vendor information, quotes, correspondence, service call requests, service schedules and vendor logs/notebooks.</p>	1 year	Paper / Electronic		<input type="checkbox"/>
MNT-02	<p>Inspection reports</p> <p>These are records of reports generated by government officials who have inspected the Library facilities. Governmental regulations require regular inspections by fire and elevator inspectors, including fire extinguishers. Retain until superseded.</p>	8 years	Paper		<input type="checkbox"/>
MNT-03	<p>Licenses and permits</p> <p>These records contain legally required permits and licenses for regular operation of the Library facilities and services, as well as construction. They include any building and elevator permits.</p>	1 year	Paper		<input type="checkbox"/>
MNT-04	<p>Security system logs</p> <p>These are logs documenting security system daily activities, such as door entry, setting and disarming the alarm system.</p> <p>NOTE: For related record series, see Security System Records.</p>	Until no longer useful	Electronic		<input type="checkbox"/>
MNT-05	<p>Security system records</p> <p>These records relate to the management and operation of the library security system for the building, such as a burglar alarm and fire alarm. They may include vendor information, statistical reports, procedures, correspondence.</p> <p>NOTE: For related record series, see Security system logs.</p>	3 years	Paper / Electronic		<input type="checkbox"/>

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REF-01	<p>Computer use statistics</p> <p>These records document the use of public computer terminals, such as Internet or word processing. They may include sign-up lists (name, card number), computer assigned, start times, length of session, and unblocked filter requests. Lists may be managed by in-house designed software, or a third party software.</p>	Until no longer useful	Electronic		<input type="checkbox"/>
REF-02	<p>Readers Advisory</p> <p>These records relate to Library departments such as Reference, Juvenile or Teen, providing recommended reading choices and recommendations to patrons. They may include book reviews, book lists, correspondence, presentations, bookletters and other related records.</p>	Until no longer useful	Paper		<input type="checkbox"/>
REF-03	<p>Reference requests & responses</p> <p>These records document research or scholarly requests for information about or access to items within the institution's collections. They may include the requester's name, address, telephone number or email address; the nature/explanation of the requests; use/purpose of the requests; date of receipt and completion of the request; staff member handling the request; amount of time spent handling the request; disposition of the request; and relate documentation and correspondence.</p>	Until no longer useful	Paper / Electronic		<input type="checkbox"/>
REF-04	<p>Reference statistics</p> <p>These records document statistical information about reference services by the use of forms, spreadsheets, database, and other related records. Information may be gathered on the number or type of queries (telephone, email, etc.), database usage, online reference service usage. The reports may include In-House Materials Count, Reference Questions Count, usage reports provided by the database vendor or online service.</p>	1 year	Paper / Electronic		<input type="checkbox"/>