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SAMPLE LIBRARY RECORDS RETENTION SCHEDULE
Ohio Historical Society
Local Government Records Program

Construction Contracts
Retention: 16 years after the project is completed

Consultant Reports
Retention: 4 years

Contracts
Retention: 15 years after expiration

Correspondence-General (Includes internal correspondence (letters, memos); also, correspondence from various individuals, companies, and organizations requesting information pertaining to agency and legal interpretations and other miscellaneous inquiries. This correspondence is informative, it does not attempt to influence agency policy)
Retention: 2 years

Correspondence-Routine (Referral letters, requests for routine information or publications provided to the public by an agency which are answered by standard for letters)
Retention: Until no longer of administrative value

Correspondence-Transitory messages (Includes telephone messages, post-it-notes, drafts and other limited documents which serve to convey information of temporary importance in lieu of oral communications)
Retention: Retain until no longer of administrative value

Court Orders for Payroll Deductions
Retention: 2 years after termination of employment or order rescinded

Documentation of Leave
Retention: 5 years, provided audited

Depository Contracts and Related Collateral
Retention: 5 year after the contract has expired, provided audited

Employee Earning Records
Retention: 5 years after termination of employment or order rescinded

Employee Withholding Requests
Retention: Until replaced or revoked by employee

Employment Applications
Retention: 7 year after receipt

Employer Quarterly Federal Tax Return
Retention: 5 years, provided audited

Expense Records
Retention: 5 years

Formal Legal Opinions
Retention: Permanent

Garnishment Orders
Retention: 5 years after termination of employment or order rescinded

Grant Files
Retention: 5 years provided all state of federal audits have been conducted, the Audit reports released and litigation, claims, or audit findings have bee resolved

Incident/Accident Reports
Retention: 5 years

Insurance Policies
Retention: 2 years after expiration, provided all claims settled

Interlibrary Loan Records
Retention: 2 years

Inventories (Property)
Retention: 5 years provided audited
SAMPLE LIBRARY RECORDS RETENTION SCHEDULE
Ohio Historical Society
Local Government Records Program

Investments
Retention: 5 years, provided audited

Leases
A. Equipment
    Retention: 2 years after expiration
B. Real estate
    Retention: 5 years after expiration, provided audited

Library Card Applications
Retention: 6 years

Library News Releases
Retention: 4 years

Library Publications
Retention: 2 years

Litigation Records
Retention: 5 years after case is closed and appeals exhausted

Meeting Room Applications
Retention: 1 year

Minutes of Board of Trustee Meetings
Retention: Permanent

Monthly Financial Reports to Library Board
Retention: 5 years, provided audited

Monthly Statistical Reports
Retention: Until incorporated into year end report

Operating Procedures
Retention: Permanent

Overdue Circulation Records
Retention: 3 years

Payroll Journal/Ledgers
Retention: 5 years, provided audited

Payroll Reports
Retention: 5 years, provided audited

Personnel Files
Retention: 2 years after termination of employment; purge extraneous records.
Retain retirement waivers, service record and leave balances permanently.

Personnel Policies
Retention: Permanent

Petty Cash Records
Retention: 5 years, provided audited

Purchase Orders/Requisitions
Retention: 5 years, provided audited

Real Property Acquisition Records
Retention: 5 years after asset is sold

Reports to Retirement Systems
Retention: 50 years

State Income Tax Report
Retention: 25 years

Survey Reports
Retention: 4 years

Training Manuals
Retention: Until no longer of administrative value

Vouchers
Retention: 5 years, provided audited

Tax Withholding Reports
Retention: 6 years, provided audited

Technology Plans
Retention: Permanent
Timesheets
  Retention: 5 years, provided audited

Video Recordings/Tape of Proceedings
  Retention: 1 year

W-2 Forms
  Retention: 6 years, provided audited

W-4 Forms
  Retention: Until superseded or employee terminates

Workers Compensation Claims
  Retention: 7 years after termination of employment