




Ohio History Connection
 State Archives of Ohio
 Local Government Records Program
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OHIO HISTORY CONNECTION
 APRIL 22 2024
 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

City of Bexley (Local Government Entity)	Human Resources (Unit)
 (Signature of Responsible Official)	Emily Buckley (Name)
	Human Resources Coordinator (Title)
	3-28-2024 (Date)

Section B: Records Commission

City of Bexley	Records Commission	614-559-4200
		(Telephone Number)
2242 E. Main Street	Bexley	43209 Franklin
(Address)	(City)	(Zip Code) (County)

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

glewis@bexley.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.

	3/28/24
Records Commission Chair Signature	Date

Section C: Ohio History Connection - State Archives

	Government Records Archivist	5/1/2024
Signature	Title	Date

Section D: Auditor of State

	Records Manager	
Signature	Title	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

CITY OF BEXLEY RECORDS RETENTION SCHEDULE

HUMAN RESOURCES

HUMAN RESOURCES Schedule Number	Record Series	Description	Retention Period	Media Type	For use by State Auditor or LGRP
HR 24-001	Disciplinary Actions/Investigations	Written notices, warnings, investigation notes	Duration of employment plus 7 years	Paper and/or Digital	
HR 24-002	Drug tests; post accident, random drug and alcohol testing	Retaining separately from Personnel File	Duration of employment plus 7 years	Paper and/or Digital	
HR 24-003	Drug tests; pre-hiring & continued employment testing	Retaining separately from Personnel File	5 years	Paper and/or Digital	
HR 24-004	Employee Exposure Records	Includes exposure to hazardous Chemicals, biological Hazards, bloodborne pathogens, or infectious diseases; Employee environmental monitoring, biological monitoring, safety data sheets; Noise exposure reports, audiometric testing records	duration of employment plus 30 years	Paper and/or Digital	
HR 24-005	Employee Grievances - Disciplinary and Non-Disciplinary Procedures	Grievances, investigations, disciplinary hearings, disciplinary actions	10 years	Paper and/or Digital	
HR 24-006	Employee Injury Reports	On-duty illness or injury - reported to BWC	5 years from date of injury or last payment on the claim	Paper and/or Digital	
HR 24-007	Employee Injury Reports	On-duty illness or injury - not reported to BWC	5 years		
HR 24-008	Employee Medical Records	Exams, doctor's notes, test results	Duration of employment plus 7 years	Paper and/or Digital	
HR 24-009	Employee Personnel Files		Duration of employment plus 7 years	Paper and/or Digital	
HR 24-010	Employee Insurance Information, Benefits, and Claim Forms		6 years after termination of plan design	Paper and/or Digital	
HR 24-011	Employee Retention	Individual personnel files, compensation records, performance appraisals, tuition reimbursement, medical histories, medical examination results, medical opinions, first aid records, description of treatment, and employee medical complaints	Duration of employment plus 7 years	Paper and/or Digital	
HR 24-012	Employee Training		Merge with personnel records when applicable, others until superseded	Paper and/or Digital	

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HUMAN RESOURCES

HR 24-013	Family Medical Leave Forms	Per FMLA	3 years	Paper and/or Digital	
HR 24-014	Fitness for Duty Test		Duration of employment plus 7 years	Paper and/or Digital	
HR 24-015	I-9 Forms	Any copies of identification need to be retained with I-9; retain all separately from Personnel File; per USCIS	3 years after date of hire or 1 year after employment ends - whichever is later	Paper and/or Digital	
HR 24-016	Insurance Request for Proposals	Risk Managment related reference materials and correspondence related to proposals	3 years	Paper and/or Digital	
HR 24-017	Informal Complaints	For union and non-union employees	4 years	Paper and/or Digital	
HR 24-018	Job Classification List and Classified Employees List		Until superseded	Paper and/or Digital	
HR 24-019	Job Posting/Job Description		1 Year After Superseded	Paper and/or Digital	
HR 24-020	PERRP 300AP	Log and summary of all occupational injuries and illnesses; Per BWC	5 Years	Paper and/or Digital	
HR 24-021	Personnel Action Forms		Merge with personnel file	Paper and/or Digital	
HR 24-022	Personnel Recruiting & Selection for Hires	Job analysis, applications, EEO forms, salary surveys, affirmation action reports, physical exams, eligibility list, testing records, criminal record check, background investigations, reference checks, polygraph, psychological exams, medical exams, release forms, related correspondence, record of interview	3 years unless merged into employment file	Paper and/or Digital	
HR 24-023	Personnel Recruiting & Selection for Non-Hires	Interview schedule, applications, interview guide and comments, record of interview	2 years	Paper and/or Digital	
HR 24-024	Personnel Surveys	Salary surveys, benefit surveys, compensation surveys, job analysis surveys	Until superseded	Paper and/or Digital	

CITY OF BEXLEY RECORDS RETENTION SCHEDULE

HUMAN RESOURCES

HR 24-025	Reports to Bureau of Employment Services		2 Years	Paper and/or Digital	
HR 24-026	Safety Training Documentation		30 years	Paper and/or Digital	
HR 24-027	Self Insurance Application		2 years	Paper and/or Digital	
HR 24-028	Unemployment Compensation Case Files		4 Years after final payment	Paper and/or Digital	
HR 24-029	Worker's Compensation	Claim files, medical bills, medical documentation, correspondence, case notes, accident descriptions, treatment requests, emails, EDI transactions; Per	5 years from date of injury or last payment on the claim	Paper and/or Digital	
HR 24-030	Workers' Compensation - SI-40 BWC Reporting Form for Self Insurance		5 years	Paper and/or Digital	
HR 24-031	Workers' Compensation; Excess Insurance and Volunteer Coverage Applications and Policies		Until statutorily dead or settled plus 6 years	Paper and/or Digital	