



Ohio History Connection
State Archives of Ohio
Local Government Records Program
800 E. 17th Avenue
Columbus, Ohio 43211-2474
614.297.2553
localrecs@ohiohistory.org
www.ohiohistory.org/lgr

GOVERNMENT RECORDS
STATE AND LOCAL

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DEC 22 2022

OHIO HISTORY CONNECTION

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

City of Huber Heights

Division of Taxation

(Local Government Entity)

(Unit)

Robin Smith

Robin Smith

Tax Administrator

12/15/22

(Signature of Responsible Official)

(Name)

(Title)

(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

City of Huber Heights Public Records Commission

937-233-1423

6131 Taylorsville Road

Huber Heights

45424

(Telephone Number)

Montgomery/Miami

(Address)

(City)

(Zip Code)

(County)

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

Anthony J. Rodger

12/15/22

Records Commission Chair Signature

Date

Section C: Ohio History Connection - State Archives

Government Records Archivist

1/10/2023

Signature

Title

Date

Section D: Auditor of State

Records Manager

Signature

Title

Date



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City of Huber Heights	Division of Taxation		
(Local Government Entity)	(Unit)		
<u>Robin Smith</u>	Robin Smith	Tax Administrator	12/15/22
(Signature of Responsible Official)	(Name)	(Title)	(Date)

Section B: Records Commission

See ORC 149.38 – ORC 149.412 for Records Commission information

City of Huber Heights Public Records Commission	937-233-1423		
6131 Taylorsville Road	Huber Heights	45424	937-233-1423
(Address)	(City)	(Zip Code)	(Telephone Number)
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→ 12/15/22

Records Commission Chair Signature	Date
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Section C: Ohio History Connection - State Archives

Signature	Title	Date
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Section D: Auditor of State

Signature	Title	Date
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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

(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
507-01	Policies, Procedures, Rules and Regulations	Retain 6 years after revised, superseded, or discontinued.	Multi		<input type="checkbox"/>
507-02	Ohio Public Records Compliance Folder (May contain appropriate RC-1 RC-@ or RC-3 forms)	Retain 25 years after revised, superseded, or discontinued.	Paper		<input type="checkbox"/>
507-03	Transient Correspondence of Communication Records	May be destroyed in the normal course of business as soon as considered to be of no value by the person holding the record.	Multi		<input type="checkbox"/>
507-04	Unsolicited Correspondence/Unsolicited Mail/Unsolicited Email and similar Unsolicited Communications	May be destroyed in the normal course of business as soon as considered to be of no value by the person holding the record.	Multi		<input type="checkbox"/>
507-05	Copies – Reading, Informational and Reference (Originals maintained)	Retain until no longer of administrative value.	Multi		<input type="checkbox"/>
507-06	Drafts and Informal Notes (Consisting of transitory information used to prepare the official record)	Retain until no longer of administrative value.	Multi		<input type="checkbox"/>
507-07	Blank Forms	Retain until obsolete or superseded.	Multi		<input type="checkbox"/>
507-08	Electronic Mail Systems (Pertains only to messages that are records as defined in ORC Section 149.011 (G) and 149.43)	Retain email that has a significant administrative, fiscal, legal or historical value. Maintain according to content. Refer corresponding RC-2. Erase email that has no significant value.	Electronic		<input type="checkbox"/>
507-09	General Correspondence (All sent and received correspondence in any medium, that serves to document the organization, functions, policies, decisions	Retain 1 year and no longer of administrative, legal, or fiscal value. File according to content.	Multi		<input type="checkbox"/>
507-10	Bulletins, Posters, General Notices and Displays	Retain until no longer administratively necessary.	Multi		<input type="checkbox"/>
507-11	Professional Organization and Association Files	Retain 1 year and no longer of administrative value.	Multi		<input type="checkbox"/>

(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
507-12	Facsimile Logs/Cover Sheets/Confirmation Notices and Buffer Printouts	Retain until no longer of administrative, fiscal, legal or historical value.	Paper		<input type="checkbox"/>
507-13	Declaration of Estimated Income Tax Forms-Business and Individual	Retain 6 years.	Multi		<input type="checkbox"/>
507-14	Quarterly Payments Statements	Retain 6 years.	Multi		<input type="checkbox"/>
507-15	Individual Income Tax Returns and Attachments	Retain 6 years.	Multi		<input type="checkbox"/>
507-16	Corporate or Partnership Income Tax Returns and Attachments	Retain 6 years.	Paper		<input type="checkbox"/>
507-17	Refund Requests and Attachments	Retain 6 years.	Multi		<input type="checkbox"/>
507-18	Withholding Tax Returns-Monthly and Quarterly	Retain 6 years.	Multi		<input type="checkbox"/>
507-19	Withholding Tax Reconciliations and W-2s	Retain 6 years.	Paper		<input type="checkbox"/>
507-20	Payment Receipts	Retain 6 years.	Paper		<input type="checkbox"/>
507-21	Taxpayer Correspondence	Retain 6 years.	Multi		<input type="checkbox"/>
507-22	Daily Cash Receipt Records (Distribution Reports)	Retain 6 years.	Paper		<input type="checkbox"/>
507-23	Database Transaction Printouts	Retain 2 years: provided audited.	Paper		<input type="checkbox"/>
507-24	Delinquent Account Records	Retain until paid or deemed uncollectible.	Paper		<input type="checkbox"/>
507-25	Uncollectible Account Records	Retain 6 years.	Paper		<input type="checkbox"/>
507-26	Postal Address Changes	Retain 3 years.	Paper		
507-27	Copies of Refund Checks	Retain 3 years: provided audited.	Paper		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

(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
507-28	Tax Data Reports	Retain 3 years: provided audited.	Paper		<input type="checkbox"/>
507-29	Legal Collection Letters	Retain 6 years after paid or discharged.	Paper		<input type="checkbox"/>
507-30	Tax Office Employee's Timesheets	Retain 6 years.	Paper		<input type="checkbox"/>
507-31	Voicemail	May be destroyed in the normal course of business as soon as considered of no values by the person holding the records.	Voicemail		<input type="checkbox"/>
507-32	Surveillance Video-Cameras in Tax Division	Ongoing recording that is rewritten when tape fills. Retain until no longer of administrative use.	Electronic		<input type="checkbox"/>
					<input type="checkbox"/>
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