



**Ohio History Connection
State Archives of Ohio
Local Government Records Program**

800 E. 17th Avenue
Columbus, Ohio 43211-2497

OHIO HISTORY CONNECTION

JUL 26 2019

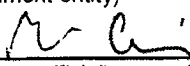
RECORDS RETENTION SCHEDULE (RC-2) – Part 1

See instructions before completing this form. Must be submitted with PART 2

STATE AND LOCAL
GOVERNMENT RECORDS

Section A: Local Government Unit

County of Summit Alcohol, Drug Addiction and Mental Health Services (ADM) Board
(Local government entity) (Unit)

 Gerald A. Craig Executive Director 7/2/19
(Signature of responsible official) (Name) (Title) (Date)


Section B: Records Commission

COUNTY OF SUMMIT RECORDS COMMISSION 330 926-2511 (Teresa Corall)
(Telephone number)

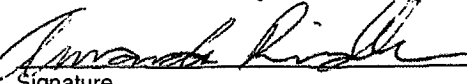
175 South Main Street, 8th floor Akron 44308 SUMMIT
(Address) (City) (Zip code) (County)

To have this form returned to the Records Commission electronically, include an email address: tcorall@summitoh.net

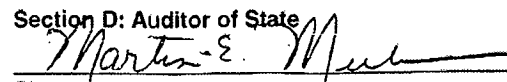
I hereby certify that on 7/18/2019 our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, 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.

 Duane Max 7/22/19
(Records Commission Chair Signature) (name) (date)

Section C: Ohio History Connection, State Archives

 Local Government Records Archivist 8-1-19
(Signature) (Title) (date)

Section D: Auditor of State

 Records Mgr 8-14-19
(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**



RECORDS RETENTION SCHEDULE (RC-2) – Part 2

Section E: Records Retention Schedule

County of Summit
(Local government entity)

Alcohol, Drug Addiction and Mental Health Services (ADM) Board
(Unit)

RC-3s are required by the County of Summit Records Commission regardless of an RC-3 required by OHC-LGRP. An asterisk (*) after the Retention Period on specific Record Titles means an RC-3 is not required for that Record Title by County of Summit Records Commission.

Permanent records existing solely in electronic format may become inaccessible through media decay and/or hardware/software obsolescence. The Ohio History Connection recommends that digital imaged records of permanent or greater than 10 year retention periods be maintained in either paper or microfilm formats in addition to digital formats.

All audits and audit discrepancies regarding the record titles listed below must be settled before the records may be disposed of.

The retention periods specified are either required by statute or have been determined by acceptable and best practice. Where a lawsuit or agency proceeding is pending, a *legal hold* on the records is required. Records that may have a bearing on the proceeding should be retained until the legal hold has been removed.

ELECTRONIC MAIL (e-mail) is a *format* on which records are sent, received and/or drafted using electronic mailing systems. E-mail is NOT a record series. Instead, each *individual* e-mail should be evaluated according to its content and retained in accordance with the record series adopted within this schedule that the content most closely fits.

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHC- LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|---|--|----------------------|--|---|
| ADM-1 | Agendas Advance notification with the time, place and purpose of scheduled meetings convened by the organization. | 2 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-2 | Board of Directors Committee Meetings Records which serve to document recommendations to the Board of Directors. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-3 | Board of Directors Meetings Minutes Records which serve to document decisions, resolutions and other activities of the Board of Directors. | Permanent | Paper/ Electronic | | <input checked="" type="checkbox"/> |
| ADM-4 | Board Members – Present & Previous Documents to reflect individual appointments and terms served on the Board of Directors. | 50 years | Paper/ Electronic | | <input checked="" type="checkbox"/> |
| ADM-5 | Board of Directors (Application for appointment) Application submission for board vacancy not chosen includes unsolicited resumes. | 1 years after receipt | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-6 | Bids/Request for Proposal (Successful) All documents of successful bids to provide goods and/or services. | Place with contract file | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-7 | Bids/Request for Proposal (Unsuccessful) All documents of unsuccessful bids to provide goods and/or services. | 2 years after letting of the contract | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-8 | Calendars Records that document the day-to-day activities of the organization. This series may include, but is not limited to, employees' daily schedules, daily work logs; appointment information and desk calendars. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-9 | Contracts and Agreements Legal agreements with individuals, organizations, and companies for services and/or goods; may include purchasing records and bid records. | 8 years after expiration | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-10 | Copies of Records Additional/convenience copies of records or images which are no longer required and serve no useful purpose. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-11 | Correspondence Correspondence dealing the administration of the office. Correspondence includes, but is not limited to, memos, faxes and letters. | 3 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-12 | Disaster Plans Documents plans and procedures to reestablish the organizations operations in the event of a disaster. | Until updated or superseded* | Paper/ Electronic | | <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 OHC- LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|--|--|----------------------|--|---|
| ADM-13 | Drafts of Letters, Memos, Reports, Worksheets, Reports and etc. Unofficial records of documents maintained for personal reference; documents prior to distribution used to develop thoughts and opinions. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-14 | Equipment Inventories Records documenting equipment held by the organization. | 3 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-15 | Equipment Maintenance Records Records documenting the maintenance of equipment held by the organization. | Life of the equipment | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-16 | Grants, Files, Financial Records and Supporting Documents (Successful) All documentation to support grant funding received by the organization. | 5 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-17 | Grants, Files, Financial Records and Supporting Documents (Rejected) All documentation to support the application of grant funding and denial of the request. | 2 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-18 | Incident Reports Incidents involving employees, volunteers, vendors, visitors which occur at the organization or when serving in an official capacity of the organization, regardless of the location are reported and investigated. | 2 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-19 | Insurance Policies All documentation to support to the insurer promises to pay for loss caused by perils covered under the policy language. | 2 years after expiration provided all claims settled | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-20 | Leases (Equipment) Equipment use agreements held by the office. | 8 years after expiration | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-21 | Leases (Real Estate) Real estate agreements. | 8 years after expiration | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-22 | Legal Opinions All documentation to support written request and explanation from Prosecutor's Office, legal counsel or attorney. | 6 years | Paper/ Electronic | | <input checked="" type="checkbox"/> |
| ADM-23 | Mail (Unsolicited or Returned) Communication received from other agencies, commercial entities, and outside institutions or individuals for general information purposes including mail returned as undeliverable. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-24 | Directives, Handbooks, Manuals and Procedures Publications produced by the organization detailing operations, regulations, and/or procedure of the office. | Until superseded, obsolete, or replaced. Retain one file copy for 3 years. | Paper/ Electronic | | <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 OHC- LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|---|--|----------------------|--|---|
| ADM-25 | Minutes of Meetings (other than Board of Directors) Records which serve to document decisions on the organization's functions, policies, decisions, procedures, operations or other activities of the office. | 6 years after committee has dissolved | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-26 | Presentations Brochures, slides, presentations, written materials, attendance logs, videos, overheads, hand-outs and other materials distributed when speaking or training a group. | 3 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-27 | Professional Association Records External publications/documents received from associations related to employee job functions that enhance job performance and knowledge, inform of events, or provide general information about the association. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-28 | Public Records Requests- Files and Logs Correspondence, research and other records regarding public records requests received by the organization and the log maintained of all public record requests. | 2 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-29 | Record Retention Document RC-1 RC-1 is used for a one time disposal of obsolete records not listed on RC-2. The Records Commission is responsible for maintaining the records and originals. | 10 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-30 | Record Retention Document RC-2 Records retention schedule used to identify the length of time a record must be retained before final disposition. The Records Commission is responsible for maintaining the records and originals. | Current plus prior one | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-31 | Record Retention Document RC-3 Certificate of Records Disposal which documents when the records were destroyed. The Records Commission is responsible for maintaining the records and originals. | 10 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-32 | Reference Materials External publications that are maintained for reference within the organization. | Until superseded, obsolete or replaced* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-33 | Reports Summary documents used to advise the status of a departmental request and or an outcome for a specific project assigned by the organization. | 3 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-34 | Reports (Required) Report with supporting documentation to meet the compliance and submission requirements of the Board of Directors, Local/State/ Federal Agencies, Grant funding, etc. | Until superseded, obsolete or replaced* | Paper/ Electronic | | <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 OHC- LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|---|--|----------------------|--|---|
| ADM-35 | Rosters Documents that show listing of a group for a specific task or function. | Until superseded, obsolete or replaced* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-36 | Table of Organization Document that shows the organization and staffing of the organization. | Until superseded, obsolete or replaced* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-37 | Transient Documents Includes telephone messages, post-it notes, voice mail messages, text messages, drafts and other limited documents which serve to convey information of temporary importance in lieu of oral communication. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-38 | Visitor Log or Sign In Sheet Registers or logs used to track individuals visiting the organization. | 1 year* | Paper | | <input type="checkbox"/> |

CLINICAL SERVICES

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHC- LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|--|-------------------------|----------------------|--|--|
| ADM-39 | Annual Clinical Reports Supporting documentation and data to include annual Behavioral Health extracts of Provider Agencies and/or internal outcomes reports. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-40 | Annual Continuous Quality Improvement Report Supporting documentation and data to meet the requirement of Board Assurances and Culture of Quality Standards used to measure/monitor system needs, effectiveness, and implement of course corrections for funded programs and services. | 10 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-41 | Civil Commitment Tracking- Documents Supporting documentation and data of clinical records of individuals under court order to the jurisdiction of the organization. | 5 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-42 | Civil Commitment Tracking- Logs Spreadsheet used to monitor individual status. | 10 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-43 | Client Rights Individual Complaints and Summary Documents Complaint initiated either verbally or in writing by a client or by any other person or agency on behalf of a client. | 6 years | Paper/ Electronic | | <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 OHC- LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|--|--|----------------------|--|--|
| ADM-44 | Clinical Reviews Supporting documentation and data of prevention reviews, Independent Peers reviews, Compliance reviews, Walkthrough Surveys, and Corrective Action reviews. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-45 | Conditional Release Report Supporting documentation and data required by regulatory authority, Ohio Department of Mental Health and Addiction Services of individuals who are in the community monitored by the organization's Coordinator of Forensic Services. | 5 years from discharge of conditional release | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-46 | Community Plan Supporting documentation and data to demonstrate the process of engaging consumers, family members, providers and other community constituents. Plan is required by regulatory authority, Ohio Department of Mental Health and Addiction Services to identify capacity development targets for treatment and recovery support services and prevention services. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-47 | Health Insurance Portability and Accountability Act (HIPAA) Forms, records and reports required by regulatory authority, Ohio Department of Mental Health and Addiction Services and federal law. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-48 | Major Unusual Incidents Reports (Client Related) Supporting documentation and data of Major Unusual Incidents required by the Ohio Administrative Code and the organization's contract with providers of services. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-49 | Quarterly Performance Outcome Reports Supporting documentation and data to include performance target outlines. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |

COMMUNITY RELATIONS

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHC-LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|---|--|----------------------|---|---|
| ADM-50 | Photo File or Images Visual documentation of a person, place or event. | Until information is no longer current. Appraise for historical value | Paper/ Electronic | | <input checked="" type="checkbox"/> (Historical) |
| ADM-51 | Press / News Releases Information disseminated to the public through media outlets. | Until information is no longer current. Appraise for historical value | Paper/ Electronic | | <input checked="" type="checkbox"/> (Historical) |

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|------------------------|---|----------------------------|----------------------|--|-------------------------------------|
| ADM-52 | Publications Service directory and annual reports and promotional materials created by the organization to inform the public of services and functions. | Permanent (only 1 copy) | Paper/ Electronic | | <input checked="" type="checkbox"/> |

FINANCE

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHC-LGRP | (6) RC-3 Required by OHC-LGRP |
|------------------------|---|-------------------------|----------------------|--|-------------------------------------|
| ADM-53 | Annual Board Budget Work papers & reports documenting the annual organization's budget for the fiscal year. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-54 | Annual Financial Reports Reports required by local, state or federal agencies to report summary of activity for the year. | 6 years | Paper/ Electronic | | <input checked="" type="checkbox"/> |
| ADM-55 | Annual Financial Statements Comprehensive report of the organization's financial condition. Report is incorporated into the Comprehensive Annual Financial Report issued by the County of Summit which is audited by the State Auditor and submitted to Government Financial Officer's Association for review and certification that it complies with proper accounting policies and methodology. | 10 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-56 | Monthly Financial Statements End of month reports detailing the organizations finances. | 4 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-57 | Audit Reports (Federal, State, Internal) Record of audit of organization. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-58 | Journal Entries (Collection, Settlements, and Reallocations) Record that keeps accounting transactions in chronological order. | 4 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-59 | Intentionally left blank | | | | <input type="checkbox"/> |
| ADM-60 | Leave Request (Employee) Records documenting an employee's request for use of sick, vacation, compensatory, or other form of leave time. | 4 years | Electronic | | <input type="checkbox"/> |
| ADM-61 | Pay-Ins to Treasury and corrections Documentation of the organization's funds paid into an account within the County Treasury includes documentation of corrections to Pay-Ins to Treasury | 4 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-62 | Intentionally left blank | | | | <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 OHC-LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|--|-------------------------|----------------------|---|--|
| ADM-63 | Payroll Reports All reports produced for each pay period. | 4 years | Electronic | | <input type="checkbox"/> |
| ADM-64 | Purchase Orders including corrections Documents authorizing spending for the purchase of supplies, equipment, and services includes documentation of corrections to or close of purchase orders | 4 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-65 | Intentionally left blank | | | | <input type="checkbox"/> |
| ADM-66 | Journal Vouchers and Corrections Packets containing a combination of purchase orders, checks (paid) and invoices (paid) for all payments issued by the County Fiscal Officer on behalf of the organization includes documentation of corrections to vouchers | 4 years | Paper/ Electronic | | <input type="checkbox"/> |

HUMAN RESOURCES

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHC-LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|--|---|----------------------|---|--|
| ADM-67 | Accidents Reports/ Files (Employee) Report of employee personal injury or accident while performing duties or occurring on property. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-68 | Advertisement for position Recruitment advertisements for position vacancy. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-69 | Application and Resume for Employment (Unsuccessful/Not Hired) Application submissions for open job positions not chosen for employment. Includes unsolicited resumes. | 1 year after receipt | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-70 | Badges & ID's Employee identification badges. | Dispose upon termination of employment* | Paper/ Plastic | | <input type="checkbox"/> |
| ADM-71 | Claims and Litigation All legal documents in case file pertaining to employees who have filed a claim or lawsuit including filings with the Ohio Civil Rights Commission and/or Equal Employment Opportunity Commission. | 5 years after case is closed and appeals are exhausted | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-72 | Intentionally left blank | | | | <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 OHC-LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|---|--|----------------------|---|--|
| ADM-73 | Immigration Form (I-9) Document to verify the identity and employment authorization of each new employee hired after November 6, 1986, to work in the United States. 8 U.S.C.§1324(a) | 3 years after the date of termination | Paper | | <input type="checkbox"/> |
| ADM-74 | Job Descriptions Documents detailing the classification, needed experience, education requirements, physical requirements, and duties by position title. | Until superseded or obsolete* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-75 | Public Employment Risk Reduction Program (PERRP) Reports Record of information about every work related injury, illness or death that may require time off work or medical treatment that is beyond first aid. Illness and injury that meet any specific criteria are listed on these reports. | 6 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-76 | Personnel Files Records documenting an individual's employment and history with the office. Files may include, but are not limited to the following: <ul style="list-style-type: none"> • Employment Applications • Internal/External • Call-Off Notice(s) • Job Audits • Grievances • Continuing education certificates • Employment Verifications • Accident Report(s) • Request(s) for Removal • Payroll Change Sheets • PERS Information • Exit Interview • Disciplinary Action(s) • Waiver(s) • • Ohio Department of Public Safety Division of Homeland Security form | Purge file 2 years after termination RETAIN: Record of service time Salary history Leave balances Taxes paid Resignation letters Retirement waivers | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-77 | Personnel Files (PURGED) Including, but not limited to: <ul style="list-style-type: none"> • Record of service time • Salary history • Leave balances • Taxes paid • Resignation letters • Retirement waivers • OPERS information | 40 years | Paper/ Electronic | | <input type="checkbox"/> |

INFORMATION TECHNOLOGY

| (1) Schedule Number | (2) Record Title and Description | (3) Retention Period | (4) Media Type | (5) For use by Auditor of State or OHC-LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|---|--|----------------------|---|--|
| ADM-78 | Database Files and Structures MS SQL Server databases and structures used to generate ad hoc and/or canned queries and reports for the analysis and payment of service claims. | 3 years after the discontinuance of use of the database and until system data is destroyed or transferred to a new structure or environment* | Electronic | | <input type="checkbox"/> |
| ADM-79 | Test Database/Files Working copies of databases and related reporting structures. | Until no longer of administrative value* | Electronic | | <input type="checkbox"/> |
| ADM-80 | Hardware/Software Documentation Records documenting the use, operation, and maintenance of computer equipment including operating manuals, hardware/operating system requirements and hardware configurations. | Retain until the related equipment is no longer in use* | Electronic | | <input type="checkbox"/> |
| ADM-81 | Server Logs Server related access and security records created and stored on network servers. Includes logs of backup and other scheduled server jobs. | Until no longer of administrative value* | Electronic | | <input type="checkbox"/> |
| ADM-82 | Network Activity Logs Firewall, router and other network equipment related logs. | Until no longer of administrative value* | Electronic | | <input type="checkbox"/> |
| ADM-83 | Multi-Agency Community Services Information System – Claims Adjudication Reports Working papers, reports, and logs used during claims adjudication, investigation or correction. | Until no longer of administrative value* | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-84 | Multi-Agency Community Services Information System – Claims File Log Log of billing files submitted to Board for claims adjudication. | 2 years | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-85 | Multi-Agency Community Services Information System – Disclosure of Information Statement Required disclosure form that users of Multi-Agency Community Services Information System (Maccsis) must sign and send to state Maccsis staff. | 1 year after employee terminates | Paper | | <input type="checkbox"/> |
| ADM-86 | Multi-Agency Community Services Information System – Member Documents Member enrollment forms, transfer requests, and other miscellaneous support documents relating to adding clients to Multi-Agency Community Services Information System (Maccsis). | 3 years | Paper/ Electronic | | <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 OHC-LGRP | (6) RC-3 Required by OHC- LGRP |
|---------------------------|--|---|----------------------|---|--|
| ADM-87 | Multi-Agency Community Services Information System – Pricing Reports Spreadsheets listing procedures and rates as set up in Multi-Agency Community Services Information System (Macsis). | 3 years | Electronic | | <input type="checkbox"/> |
| ADM-88 | Multi-Agency Community Services Information System – Provider Request/Modification Provider requests to have demographic (organizational name, address, new location, etc...) information changed or added to Multi-Agency Community Services Information System (Macsis) | 3 years | Paper | | <input type="checkbox"/> |
| ADM-89 | Multi-Agency Community Services Information System – Provider Test File Reports Reports from Multi-Agency Community Services Information System (Macsis) staff related to results of provider file testing when new or changed specifications are introduced by the state. | 1 year after provider passes test phase | Paper/ Electronic | | <input type="checkbox"/> |
| ADM-90 | Multi-Agency Community Services Information System – Provider Test Files (Claims, Outcomes, Behavioral Health Module) Provider submitted files used in state introduced new or changed file specifications. | 1 year after provider passes test phase | Electronic | | <input type="checkbox"/> |
| ADM-91 | Multi-Agency Community Services Information System – Remittance Related Files Detail payment records sent to providers in standard files. | 3 years | Electronic | | <input type="checkbox"/> |
| ADM-92 | Multi-Agency Community Services Information System – User Account Request Login and system access requests sent to Macsis personnel to add new Board users to Multi-Agency Community Services Information System (Macsis). | 1 year after employee terminates | Paper | | <input type="checkbox"/> |
| ADM-93 | Ohio Department of Job and Family Services Agency Reimbursement Accounting Detail reimbursement files related to Ohio Department of Job and Family Services (ODJFS) Medicaid payments to the Board. | 3 years | Electronic | | <input type="checkbox"/> |
| ADM-94 | Office of Information Technology (OIT) Request for Transmission Control/Internet Protocol (TCP/IP) Access Requests for general logins for Board staff to the state's systems required to receive a Multi-Agency Community Services Information System (Macsis) login. | 1 year after employee terminates | Paper | | <input type="checkbox"/> |