WCBDD Records Retention Schedule

SCHEDULE # KEY: AP = ACCOUNTS PAYABLE; AD = ADMINISTRATION; CES= COMMUNITY EMPLOYMENT SERVICES; EI = EARLY INTERVENTION; ID = INDIVIDUAL DEPARTMENT; ISS = SCHOOL; K = KITCHEN; M = MAINTENANCE; NAW = HAB CENTER; NU = NURSING; P = PAYROLL; RD = RECORDS DEPARTMENT; SLP= SPEECH LANGUAGE PATHOLOGY SSA = SERVICE COORDINATION; TR=TRANSPORTATION

Schedule	INT, SET - STEECH EANGUAGE FATHOLOGY S.				Destroy	
Number	Record Title	Retention Period	Destruction Dates	Medium	Dates	Dept.
AD 1	Accounts Payable/Accounts Receivable	A	No DC 2 required	Danas /Flastsania		A /D
AP-1	Spreadsheet for reporting to state Bank Statements; Cancelled checks, bank	4 years after an audit	No RC-3 required	Paper/Electronic	As needed	A/P
AP-2	deposits, bank statements	4 years after an audit	No RC-3 required	Paper/Electronic	As needed	A/P
			·			
AP-3	Wayne County Expense Report	4 years after an audit	No RC-3 required	Paper/Electronic	As needed	A/P
l		6 19			l	. /5
AP-4	Wayne County Travel Expense Report	4 years after an audit	No RC-3 required	Paper/Electronic	As needed	A/P
	Cash Books/Journals for cash transactions,					
AP-5	petty cash transactions, disbursement & receipts; Receipt books	4 years after an audit	No RC-3 required	Paper/Electronic	As needed	A/P
AF-3	Invoices paid; Purchase Orders; Receiving	4 years after an addit	No NC-3 required	raper/Liectronic	As fieeded	A/F
AP-6	Documents; Requisitions	4 years after an audit	No RC-3 required	Paper/Electronic	As needed	A/P
AP-7	Tuition Reimbursement	7 years	No RC-3 required	Paper/Electronic	As needed	A/P
AP-8	Vision Benefit Reimbursement	7 years	No RC-3 required	Paper/Electronic	As needed	A/P
A1 -0	Vision Benefit Kelmbursement	/ years	No NC-3 required	r aper/ Liectronic	Astriceded	
		2 years after separation of		Paper to Electronic		
AD-1	Building Key Assignments	employment	No RC-3 required	then destroy paper	As needed	Admin
		6 Years or until initiated				
		audit is resolved whichever		Paper to Electronic		
AD-2	Abuser Registry Annual Notice	is longer	No RC-3 required	then destroy paper	As needed	Admin
				Paper to Electronic		
AD-3	Applicant Interview Evaluation (staff hired)	PERMANENT	N/A	then destroy paper	N/A	Admin
				Paper to Electronic		
AD-4	Audit/Performance Review Reports	10 years after an audit	No RC-3 required	then destroy paper	As needed	Admin
45.5	Authorization for Pologo of Information	6 years from last effective	No DC 2 required	Paper to Electronic	A	A duation
AD-5	Authorization for Release of Information	date	No RC-3 required	then destroy paper Paper to	As needed	Admin
				Electronic then		
AD-6	Board Committee Minutes	Permanent	Complete RC-3	destroy paper	N/A	Admin
				Paper to		
AD-7	Board Monting Minutes & Agendes	Permanent	Complete BC 2	Electronic then	NI/A	A durain
AU-7	Board Meeting Minutes & Agendas	Permanent	Complete RC-3	destroy paper	N/A	Admin
				Paper to Electronic		
AD-8	Board Meeting Packets	Permanent	N/A	then destroy paper	N/A	Admin
AD-9	Board Member Appointments	Permanent	N/A	Paper to Electronic then destroy paper		Admin
AD-9	Board Welliber Appointments	remanent	N/A	their destroy paper	IN/A	Aumin
				Paper to Electronic		
AD-10	Board Member Training	1 year after expiration	No RC-3 required	then destroy paper	As needed	Admin
AD-11	Board Publications-keep one copy permanently	Permanent	N/A	Paper to Electronic then destroy paper		Admin
VD-11	Budget Preparation Documents: Records	Permanent	IV/ A	men destroy paper	111/74	Autiliii
	and documents used to prepare the annual			Paper to Electronic		
AD-12	budget	4 years	No RC-3 required	then destroy paper	As needed	Admin
				Paper to		
	The state of the s			Electronic then		
AD-12	Low Pocords	Pormanent	Complete PC 2	doctroy namer	NI/A	Admin
AD-13	Levy Records	Permanent	Complete RC-3	destroy paper	N/A	Admin
AD-13	Levy Records Bulletins, Posters and Notices to Employees		Complete RC-3	destroy paper Paper to Electronic	N/A	Admin
AD-13	Levy Records	Permanent	Complete RC-3	destroy paper	N/A	Admin

				1		
AD-15	Certification/Registration/ Licensure Staff	Permanent	N/A	Paper/Electronic	N/A	Admin
AD-16	Claims and Litigation records	Permanent	N/A	Paper/Electronic	N/A	Admin
AD-17	Computer Network Responsibility Acceptance	Last Day of Employment	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-18	County Board Emergency Waiver Capacity Request Form	Permanent	N/A	Paper to Electronic then destroy paper		Admin
AD-19	Emergency Response Plan	Until obsolete or superseded	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-20	FIRE DRILL REPORT ADULTS	INACTIVE		Paper then destroy provided audited	N/A	Admin
AD 21	General Lodger and Financial Penerts	Dormanont	N/A	Paper to Electronic		Admin
AD-21	General Ledger and Financial Reports In Service or other Sign In Sheets for	Permanent	N/A	then destroy paper Paper to Electronic		Admin
AD-22	mandatory Staff Trainings	Permanent	N/A	then destroy paper Paper to Electronic	,	Admin
AD-23	Adult Performance Review Reports	10 Years	No RC-3 required	then destroy paper	1	Admin
AD-24	Minutes of State Rule Required Committees (Strategic Planning, Human Rights, Behavior Support, Ethics and MUI)	7 years and no administrative value	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-25	Monthly Tornado and Fire Drill Reports Adults	10 years	No RC-3 required	Paper to Electronic then destroy paper	l .	Admin
AD-26	Policy & Procedure Manual, Rules, Regulations	Until superseded-keep one copy for an audit	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-27	Safety Committee Minutes	3 Years following current year	No RC-3 required	Paper to Electronic then destroy paper		Admin
AD-28	Severe Weather Drill Report Adults & School	3 Years following current year	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-29	Table of Organization/Organization Chart	Until obsolete or superseded	No RC-3 required	Paper to Electronic then destroy paper		Admin
AD-30	Vendor files	Until obsolete or superseded	No RC-3 required	Paper to Electronic then destroy paper	l .	Admin
AD-31	Bids: successful originals	15 years after expiration	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-32	Bids: Unsuccessful	2 years after letting of contract	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-33	Adult Services Staff Registration/Certification/Signature Sheet	2 years after termination	No RC-3 required	Paper/Electronic	As needed	Admin
AD-34	Boiler Operation License/Certificate	5 Years	No RC-3 required	Paper to Electronic then destroy paper	1	Admin
AD-35	Building Blue Prints	Permanent	Complete RC-3	Paper to Electronic then destroy paper	N/A	Admin
AD-36	Building Inspection Records	10 Years	No RC-3 required	Paper to Electronic then destroy paper	I	Admin
				Danas ta Flactuacia		
AD-37	Building Occupancy Permits	Until Obsolete	No RC-3 required	Paper to Electronic then destroy paper		Admin

AD-62	UIR/MUI; contact information; billing reportsGatekeeper; WASP or Q	migrated to any new system	No RC-3 required	Electronic	N/A	Admin
	client DATABASE of current client information, including case notes; ISP; IEP; medical information; accident reports;	changes occur or as data no longer has administrative value; Ensure data is				
AD-61	ACA DOCUMENTATION	10 years then dispose, provided audited Past data destroyed as	No RC-3 required	Paper	As needed	Admin
AD-60	Annual Statements	Permanent	Complete RC-3	Paper/Electronic	N/A	Admin
AD-58	Annual Departmental Budget/Reports	5 years	No RC-3 required	Paper to Electronic then destroy paper		Admin
AD-57 AD-58	Medicaid Billing Documentation Annual Cost Reports	8 years provided audited	No RC-3 required No RC-3 required	Paper/Electronic Paper/Electronic	As needed As needed	Admin Admin
AD 57	Medicaid Billing Documentation	10 Years from the date payment is received or until an initiated audit is resolved, whichever is	No PC 2 required	Paper/Electronic	Ve booded	Admin
AD-56	UPDATE PUBLICATION	Permanent	Complete RC-3	Paper to Electronic then destroy paper	N/A	Admin
AD-55	Annual Certifications	7 years	No RC-3 required	Paper/Electronic	As needed	Admin
AD-54	Program Calendars Adult & Children documents scheduled & non scheduled days	3 months after an audit	No RC-3 required	Paper	As needed	Admin
AD-53	Accreditation Files	Retain final report permanent; Retain working documents until next accreditation period.	N/A	Paper/Electronic	N/A	Admin
AD-52	Contact Information	Until obsolete or superseded	No RC-3 required	Paper to Electronic then destroy paper	As needed	Admin
AD-51	Annual Plan	Permanent	Complete RC-3	Electronic then destroy paper	N/A	Admin
AD-50	WCBDD Website	Until obsolete or superseded	No RC-3 required	Paper to Electronic then destroy paper Paper to	As needed	Admin
AD-49	Request for Amendment of or addition to PHI	Permanent	N/A	Paper to Electronic then destroy paper	N/A	Admin
AD-48	Request for Accounting of Disclosures of PHI	Permanent	N/A	Paper to Electronic then destroy paper	N/A	Admin
AD-47	Mailing Lists	Until obsolete or superseded	No RC-3 required	Paper to Electronic then destroy paper	As needed	Admin
AD-46	Leases-real estate	5 years after expiration	No RC-3 required	Paper	As needed	Admin
AD-44	Leases-equipment	2 years after expiration	No RC-3 required	Paper	As needed	Admin
AD-43	Annual Agency Budget	Permanent	Complete RC-3	Paper to Electronic then destroy paper	N/A	Admin
AD-42 AD-43	Insurance Policies Inventory of County Property	2 years after expiration 3 years after completed audit	No RC-3 required No RC-3 required	Paper Paper/Electronic	As needed As needed	Admin Admin
AD-41	Federal Grant Files	audit findings resolved	No RC-3 required	then destroy paper		Admin
AD-40	Contracts	5 years provided all state and federal audits are complete, all litigation,	No ne-3 required	Paper to Electronic	As needed	Admin
AD-40	Contracts	7 years provided no claims	No RC-3 required	Paper/Electronic	As needed	Admin

	BA(BUSINESS		1	1		I
	ASSOCIATE)/MOU(MEMORANDUM OF	Until Updated or				
AD-63	UNDERSTANDING)	superseded	No RC-3 required	Paper/Electronic	As needed	Admin
AD-64	Superintendent Notes and Records	Permanent	N/A	Paper/Electronic	N/A	Admin
		Use for one cycle then				
		reuse provided no action				
AD-65	Building Security/Surveillance Video	pending	No RC-3 required	Hard Drive	As needed	ADMIN
		30 days after separation of				
AD-66	Electronic Signature Acknowledgement	employment	No RC-3 required	Paper/Electronic	As needed	Admin
						Community
						Employment
CES-1	Person Centered Functional Assessment	Permanent	N/A	Paper/Electronic	N/A	Services
						Community
						Employment
CES-2	Person Centered Goal & Strengths	Permanent	N/A	Paper/Electronic	N/A	Services
						Community
		Until obsolete or				Employment
CES-3	Person Centered Employment Plan	superseded	No RC-3 required	Paper/Electronic	As needed	Services
		10 Years from the date				
		payment is received or until				Community
		an initiated audit whichever				Employment
CES-4	Service Sheet	is longer.	No RC-3 required	Paper/Electronic	As needed	Services
						Community
		Until obsolete or				Employment
CES-5	Vocational Assessment	superseded	No RC-3 required	Paper/Electronic	As needed	Services
						Community
						Employment
CES-6	Attendance Sheets	Permanent	N/A	Paper/Electronic	N/A	Services
						Community
						Employment
CES-7	ON-SITE Assessment	Permanent	N/A	Paper/Electronic	N/A	Services
						Community
						Employment
CES-8	Service Change Form	Permanent	N/A	Paper/Electronic	N/A	Services
		10 Years from the date				
		payment is received or until				Community
CEC O	DVD Common and an ac	an initiated audit whichever	N = DC 2 == == i== d	D/51		Employment
CES-9	BVR Correspondence	is longer.	No RC-3 required	Paper/Electronic	As needed	Services Community
		Until obsolete or				1
CES 10	Bacumas & Cayor Latters		No BC 2 required	Danor/Electronic	As pooded	Employment
CES-10	Resumes & Cover Letters	superseded	No RC-3 required	Paper/Electronic	As needed	Services
	Case notes: Transition Students from					Community Employment
CES-11	School to CES	Permanent	N/A	Paper/Electronic	N/A	Services
CE3-11	Community Employment Procedures, May	remanent	IN/A	Paper/Electronic	IN/A	Services
	contain (Data Sheet, Referral, Transition,					Community
	VTEC Marketing, Purchases, Community	Until obsolete or				Employment
CES -12	Employment)	superseded	No RC-3 required	Paper/Electronic	As needed	Services
CL3 12		10 Years from the date		r aper, zreen erne	7.5.1100000	00.1.000
		payment is received or until				Community
		an initiated audit whichever				Employment
CES-13	Title XX Unit of Service Logs	is longer.	No RC-3 required	Paper/Electronic	As needed	Services
			1 1 1 1 1 1 1 1	, , , , , , , , , , , , , , , , , , , ,		1
				Paper to Electronic		Early
EI-1	Early Intervention Service Application	Permanent	N/A	then destroy paper	N/A	Intervention
	,			, , , , , , , , ,	·	
	Early Intervention Services Provider			Paper to Electronic		Early
EI-2	Enrollment Form	Permanent	N/A	then destroy paper	N/A	Intervention
				7	·	
				Paper to Electronic		Early
EI-3	Battelle Developmental Inventory	Permanent	N/A	then destroy paper	N/A	Intervention
	E-LAP Early Learning Accomplishment			Paper to Electronic		Early
		I	INI/A	then destroy paper	N/A	Intervention
EI-4	Profile	Permanent	N/A	Tinen acousty paper	,	
EI-4	Profile	Permanent	IN/A	their destroy paper	.,,	
EI-4	Profile	Permanent	IN/A	Paper to Electronic	.,,	Early

				Paper to Electronic		Early
בו כ	Progress Notes LUD's in "O"	Dormanant	N/A	then destroy paper	NI/A	l '
EI-6	Progress Notes, UIR's in "Q"	Permanent	IN/A	then destroy paper	IN/A	Intervention
	Attendance for Home Community Based				l,	Early
EI-7	Services entered in "Q"	Permanent	N/A	Electronic	N/A	Intervention
				Paper to Electronic		Early
EI-8	EMF Forms (Emergency Medical Forms)	Permanent	N/A	then destroy paper	N/A	Intervention
				Paper to Electronic		Early
EI-9	Early Intervention Enrollment Forms	Permanent	N/A	then destroy paper	N/A	Intervention
				Paper to Electronic		Early
EI-10	Parental Contact Form	Permanent	N/A	then destroy paper	N/A	Intervention
				Paper to Electronic		Early
EI-11	IFSP, notifications, transitions	Permanent	N/A	then destroy paper	N/A	Intervention
				Paper to Electronic		Early
EI-12	PTC Request for Services	Permanent	N/A	then destroy paper	N/A	Intervention
				and a court of paper		
	Correspondence such as Medical;			Paper to Electronic		Early
EI-13	Environmental; etc.	Permanent	N/A	then destroy paper	N/A	Intervention
F1-13	Environmental, etc.	r critiatient	1 V / C	men destroy paper	114/	intervention
				Danor to Floates:		Early
	IED to EED of 2nd Binth do	D	N1/A	Paper to Electronic	N. /A	Early
EI-14	IEP to ETR at 3rd Birthday	Permanent	N/A	then destroy paper	N/A	Intervention
l	L	Until Updated or				
IA-1	MUI Prevention Plan Template	superseded	No RC-3 required	Paper/ Electronic	As needed	IA
IA-2	MUI Records	Permanent	N/A	Paper/ Electronic	N/A	IA
		7 years from the date				
		payment is received or until				
		an initiated audit is				
		resolved, whichever is				Individual
ID-1	BVR Correspondence / Documentation	longer	No RC-3 required	Paper/ Electronic	As needed	Department
		3 Years following current				Individual
ID-2	Client Sign In/Out Ledger	year	No RC-3 required	Paper/ Electronic	As needed	Department
			·			Individual
ID-3	Client Monthly Average Attendance Report	Permanent	N/A	Paper/ Electronic	N/A	Department
	Client Designation for Authorized		,			Individual
ID-4	Representative	Permanent	N/A	Paper/ Electronic	N/A	Department
15 1	Representative	remanent	14/71	rapery Electronic	14/71	Individual
ID-5	Committee/ Meeting Minutes	Permanent	Complete RC-3	Paper/ Electronic	N/A	Department
U-3	Committee/ Weeting Windtes	remanent	Complete RC-3	rapel/ Liectronic	IV/A	Department
						ا ماندنا ما
l		Until no longer needed for			l	Individual
ID-6	Convenience Copies	administrative purposes	No RC-3 required	Paper/ Electronic	As needed	Department
	Correspondence Files - Critical/Executive					
	correspondence is Permanent. General					
	correspondence (non-specific related to					
	general administration, function, policies,					
	decisions, procedures, memos and other					
	activities of the agency) is 1 year if no					
	longer of an administrative legal or fiscal					
	value. Unsolicited correspondence/mail is					
	retained until no longer of administrative	See retention dates listed in				Individual
ID-7	value.	column B	No RC-3 required	Paper/ Electronic	As needed	Department
				, , , , , , , , , , , , , , , , , , , ,		Individual
ID-8	Daily Attendance Records	Permanent	N/A	Paper/ Electronic	N/A	Department
.5 5	Jany recentance records	. c.manent	,	. aper, Electronic		Individual
ID-9	Leave Slips Time Off Requests All Staff	Permanent	RC-3 required	Paper/ Electronic	N/A	Department
1D-3	Leave Shp3 Time Off Requests All Staff		no-3 required	aper/ Liectionic	13/7	
ID 10	Phono List	Until Updated or	Na BC 3 1	Deman/Elect		Individual
ID-10	Phone List	superseded	No RC-3 required	Paper/ Electronic	As needed	Department
					l,.	Individual
ID-11	Program Enrollment Records	Permanent	N/A	Paper/ Electronic	N/A	Department
	Yearbooks, Brochures, Handouts keep one				.	Individual
					1 5 1 / 5	
ID-12	сору	Permanent	N/A	Paper/ Electronic	N/A	Department
ID-12	copy Rosters (annual) Personnel; Individuals;	Permanent	N/A	Paper/ Electronic Paper/ Electronic	N/A	Individual

	I					
	Signs, Templates, Forms for Temporary	Until No Longer needed for				Individual
ID-14	Operational Purposes	Administrative Purposes	No RC-3 required	Paper/ Electronic	As needed	Department
15.45	S. 55.4	Until Updated or			l	Individual
ID-15	Staff Meeting Notes	superseded 3 Years following current	No RC-3 required	Paper/ Electronic	As needed	Department Individual
ID-16	Staff Sign In/Out Ledger	year	No RC-3 required	Paper/ Electronic	As needed	Department
10 10	Starr Sign my Out Leager	year	No Ne 3 required	Tupery Electronic	Astrecaea	Individual
ID-17	UIR Reports	PERMANENT	N/A	Paper/ Electronic	N/A	Department
		3 Years following current				Individual
ID-18	Visitor Sign In/Out logs	year	No RC-3 required	Paper/ Electronic	As needed	Department
ID-19	Volunteer packets	Until No Longer needed for Administrative Purposes	No RC-3 required	Paper/ Electronic	As needed	Individual Department
10-13	volunteer packets	Administrative raiposes	No Ne-3 required	r aper/ Electronic	As needed	Department
	Weather/Fire/Disaster Drill Maps all	Until No Longer needed for				Individual
ID-20	facilities	Administrative Purposes	No RC-3 required	Paper/ Electronic	As needed	Department
	E-Mail Executive Correspondence (Policy,					Individual
ID-21	Procedure, Function decisions of Agency)	Permanent	N/A	Electronic	N/A	Department
ID-22	E-Mail Departmental Policies or Procedures	Until obsolete or superseded	No RC-3 required	Electronic	As needed	Individual Department
10 22	E-Mail General Correspondence (Memos,	Juperseucu	No Ne 3 required	Licetronic	Astriccaca	Individual
ID-23	Information Requests)	1 year then destroy	No RC-3 required	Electronic	As needed	Department
	E-Mail Routine correspondence					Individual
ID-24	(Publications, Form letters)	6 Months then destroy	No RC-3 required	Electronic	As needed	Department
	E AA II GI WAA II AA				l	Individual
ID-25	E-Mail Staff Meeting Minutes	2 Years then destroy	No RC-3 required	Electronic	As needed	Department
	E-Mail Transient (Meeting Notices, Phone	Until No Longer needed for				Individual
ID-26	Messages)	Administrative Purposes	No RC-3 required	Electronic	As needed	Department
		·				Individual
ID-27	E-Mail Weekly or Monthly Reports	1 year then destroy	No RC-3 required	Electronic	As needed	Department
ISS-1	Bus Postor, School El	Until Updated or superseded	No BC 2 required	Paper to Electronic then destroy paper	As pooded	ıcc
133-1	Bus Roster - School, El	superseueu	No RC-3 required	then destroy paper	As fieeded	ISS
				Paper to Electronic		
ISS-2	A-B-C Chart	Permanent	N/A	then destroy paper	N/A	ISS
				Paper to Electronic		licc.
ISS-3	Attendance Report/Absent Reports	Permanent	N/A	then destroy paper	N/A	ISS
		Until Updated or		Paper to Electronic		
ISS-4	Authorization for Release of Information	superseded	No RC-3 required	then destroy paper	As needed	ISS
		Until Updated or		Paper to Electronic		
ISS-5	Calendar	superseded	No RC-3 required	then destroy paper	As needed	ISS
		Until Updated or		Paper to Electronic		
ISS-6	Change of address	superseded	No RC-3 required	then destroy paper	As needed	ISS
				, , , , , , , , , , , , , , , , , , , ,		
		Until Updated or		Paper to Electronic		
ISS-7	Changes in School Immunizations	superseded	No RC-3 required	then destroy paper	As needed	ISS
				Paper to Flacture:		
ISS-8	File Access Control Form	Permanent	N/A	Paper to Electronic then destroy paper		ISS
		. s.manent		men destroy paper	, , ,	
				Paper to Electronic		
ISS-9	DODD-Individual Data System-Summary	Permanent	N/A	then destroy paper	N/A	ISS
				Banani 51		
ICC 10	Emergency Medical Authorization	Permanent	N/A	Paper to Electronic	N/A	ISS
ISS-10	Emergency Medical Authorization	Permanent	N/A	then destroy paper	IN/A	اندا
		Until Updated or		Paper to Electronic		
ISS-11	Enrollee Health Guide	superseded	No RC-3 required	then destroy paper	l .	ISS
				Paper to Electronic	.	
ISS-12	Enrollee Information	Permanent	N/A	then destroy paper	N/A	ISS

		T	1	1	1	1
				Paper to Electronic		
ISS-13	Home Visit	Permanent	N/A	then destroy paper	1	ISS
133 13	Tionic visit	remanent	N/A	then destroy paper	IN/A	133
				Paper to Electronic		
ISS-14	Medical Evaluation	Permanent	N/A	then destroy paper	N/A	ISS
				Paper to Electronic		
ISS-15	Medical Statement-Dietary Needs	Permanent	N/A	then destroy paper	N/A	ISS
		Until Updated or		Paper to Electronic		
ISS-16	Medication Form	superseded	No RC-3 required	then destroy paper	Δs needed	ISS
155 10	Wedleation of the	Juperseucu	No Ne 3 required	then destroy paper	Astriccaca	133
		Until Updated or		Paper to Electronic		
ISS-17	Memo from Nurses	superseded	No RC-3 required	then destroy paper	As needed	ISS
		Until Updated or		Paper to Electronic		
ISS-18	Permission to Videotape	superseded	No RC-3 required	then destroy paper	As needed	ISS
				Paper to Electronic		
ISS-19	Physical Restraint Log	Permanent	N/A	then destroy paper	1	ISS
133-13	Thysical Restraint Log	remanent	IN/A	then destroy paper	11/7	133
				Paper to Electronic		
ISS-20	Preschool Exemption Forms	Permanent	N/A	then destroy paper	1	ISS
	·					
				Paper to Electronic		
ISS-21	Preschool-Child Medical Statement	Permanent	N/A	then destroy paper	N/A	ISS
100.33	Dragues Depart	Danmanan	N. / A	Paper to Electronic	N1/A	ıcc
ISS-22	Progress Report	Permanent	N/A	then destroy paper	IN/A	ISS
		6 years after last effective		Paper to Electronic		
ISS-23	ISS Release of Information	date	No RC-3 required	then destroy paper	As needed	ISS
			·	/		
	School Record of Persons Obtaining Access					
ISS-24	to Confidential Education Records	Permanent	N/A	Paper/Electronic	N/A	ISS
				Paper to Electronic		
ISS-25	Students Entering Our School	Permanent	N/A	then destroy paper	N/A	ISS
	Students Moving From One District To			Paper to Electronic		
ISS-26	Another District	Permanent	N/A	then destroy paper		ISS
			,	, , , , , , , , , , , , , , , , , , , ,	<u> </u>	
				Paper to Electronic		
ISS-27	Treatment Authorization Form	Permanent	N/A	then destroy paper	N/A	ISS
		10 Years from the date				
		payment is received or until				
		an initiated audit is				
ISS-28	Daily Pupil Absentee by location	resolved, whichever is	No RC-3 required	Paper/Electronic	As needed	ISS
ISS-28	Individual Education Plan (IEP)	longer Permanent	N/A	Paper/Electronic	N/A	ISS
	Field Trip Request Form and		7	2, 2.7, 2.00 d o i i i	-,	
ISS-30	Documentation	Permanent	N/A	Paper/Electronic	N/A	ISS
		3 Years after current school				
ISS-31	Teacher Lesson Plan	year	No RC-3 required	Paper/Electronic	As needed	ISS
ISS-32	Graduation Volunteer Recognition	Permanent	N/A	Paper/Electronic	N/A	ISS
ISS-33	Employee Recognition	Permanent	N/A	Paper/Electronic	N/A	ISS
K-1	CN-7 Free and Reduced Lunches & Ledger	3 years after current year	No RC-3 required	Paper	Ve booded	Kitchen
IV-T	Daily Register Tape & Register	years arren current year	INO INC-3 required	i ahci	As needed	MUNCH
K-2	Reconciliation sheet	3 years after current year	No RC-3 required	Paper	As needed	Kitchen
		3 Years following current				
K-3	Food Preparation License/Certification	year	No RC-3 required	Paper	As needed	Kitchen
		3 Years following current				
K-4	Health Department Inspection Reports	year	No RC-3 required	Paper	As needed	Kitchen
	lavoratori Chara C. Will C		N- BC 2	Paper to Electronic		likin ala a
K-5	Inventory Sheets for Kitchen Operation	3 years after current year	No RC-3 required	then destroy paper	As needed	Kitchen

		<u> </u>	1	1	<u> </u>	I
				Paper to Electronic		
K-6	Lunch Menus, food usage tracking for state	3 years after current year	No RC-3 required	then destroy paper	As needed	Kitchen
				Paper to Electronic		
K-7	Lunch Sheet Adults & Children	3 years after current year	No RC-3 required	then destroy paper	As needed	Kitchen
	Lunch Sheets Running Total Monthly and			Paper to Electronic		
K-8	Weekly	3 years after current year	No RC-3 required	then destroy paper	1	Kitchen
к о	Many Production Poserd	2 years after surrent year	No DC 2 required	Danar	As pooded	
K-9	Menu Production Record	3 years after current year 3 Years following current	No RC-3 required	Paper	As needed	Kitchen
K-10	Refrigerator Temperature Sheets	year	No RC-3 required	Paper	As needed	Kitchen
K-11	Temperature Recording Charts	3 Years following current year	No RC-3 required	Paper	As needed	Kitchen
K II	remperature necorang enarts	year	No Ne 3 required	Тирет	Astriceded	Kitchen
K-12	Vendor Delivery Slips for Kitchen (Copies)	3 years after current year	No RC-3 required	Paper	As needed	Kitchen
M-1	Work Order Forms	4 years	No RC-3 required	Paper/Electronic	As needed	Maintenance
		Until Updated or				
M-2	Material Safety Data Sheets (MSDS)	superseded Until Updated or	No RC-3 required	Paper/Electronic	As needed	Maintenance
M-3	Maintenance Vendor list	superseded	No RC-3 required	Paper	As needed	Maintenance
M-4	Maintenance Schedules for buildings, grounds, equipment	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper	l .	Maintenance
101 4	Maintenance Inspection Schedules (Fire;	Until Updated or	No ne s required	then destroy paper	Astriceded	Wallicenaries
M-5	Building, Fire Ext; ETC)	superseded	No RC-3 required	Paper/ Electronic	As needed	Maintenance
M-6	Building Key Receipt	Permanent	N/A	Paper/ Electronic	N/A	Maintenance
		Until obsolete or		Paper to Electronic		
NAW-1	60 Day Non-attendance Letter (Current)	superseded	No RC-3 required	then destroy paper	As needed	NAW
NAW-2	Adult Day Supports	10 years after an audit	No RC-3 required	Paper	As needed	NAW
IVAVV-2	Addit Day Supports	10 years arter air addit	No NC-3 required	гареі	As fieeded	INAVV
		Until no longer needed for		Paper to Electronic	1	
NAW-3	Break Sheet Adults	Administrative purposes	No RC-3 required	then destroy paper	As needed	NAW
				Paper to Electronic		
NAW-4	Bus Roster- Adults	Until Obsolete	No RC-3 required	then destroy paper	As needed	NAW
		7 Years from the date payment is received or until				
		an initiated audit is				
	Daily Acuity Oldman Road Facility	resolved, whichever is				
NAW-5	Management Use Only Adults	longer	No RC-3 required	Electronic	As needed	NAW
NAW-6	Daily Documentation Sheet	10 years after an audit	No RC-3 required	Paper	As needed	NAW
NAW-7	Direct Deposit NAW Clients	Until obsolete or superseded	No RC-3 required	Paper to Electronic then destroy paper		NAW
IVAVV-7	Direct Deposit NAW Clients	superseded	No NC-3 required	then destroy paper	As fieeded	IVAVV
		Until No Longer needed for		Paper to Electronic	I	
NAW-8	Documentation Accuracy Review Adults	Administrative Purposes	No RC-3 required	then destroy paper	As needed	NAW
				Paper to Electronic		
NAW-9	Enrollee Complaint Form Adults	Permanent	N/A	then destroy paper	N/A	NAW
	Environmental Checklist Oldman Road	Until No Longer needed for		Paper to Electronic		
NAW-10	Adults	Administrative Purposes	No RC-3 required	then destroy paper	1	NAW
NAW-11	Environmental Checklist Oldman Road Results Adults	Until No Longer needed for Administrative Purposes	No RC-3 required	Paper to Electronic then destroy paper	l .	NAW
			- E III S I Equitou	Less by paper	1	
	Field Trip Destinations Management Use	Until no longer needed for	N- BC 3	Paper to Electronic	1	
NAW-12	Only Adults	Administrative purposes	No RC-3 required	then destroy paper	As needed	NAW
NAW-13	Field Trip Request Form Adults	Current Year	No RC-3 required	Paper	As needed	NAW
NIANA C	W-9 2013 form for Taxpayer Identification				N / A	
NAW-14	Number (TIN)	Permanent	N/A	Paper	N/A	NAW

	I		Ι	I	I	I
NAW-15	Waiver Lists Management Use Only	Until No Longer needed for Administrative Purposes	No RC-3 required	Paper to Electronic then destroy paper	1	NAW
NAW-16	Workshop Attendance and Behavior Contract	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper	1	NAW
NAVV-10			No KC-3 required	then destroy paper	As needed	INAVV
NAW-17	Yearbook Instructions, Sales Tracking Management Use Only	Until No Longer needed for Administrative Purposes	No RC-3 required	Electronic	As needed	NAW
	Hab Codes Payroll Reports 9953	Until No Longer needed for		Paper to Electronic		
NAW-18	Management Use Only Adults	Administrative Purposes	No RC-3 required	then destroy paper	As needed	NAW
NAW-19	Habilitation Assessment Inventory	Permanent	N/A	Paper to Electronic then destroy paper	N/A	NAW
NAW-20	Habilitation Codes (Current) Adults	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper	As needed	NAW
NAW-21	Habilitation Goal Performance Tracking Adults	Permanent	N/A	Paper to Electronic then destroy paper	N/A	NAW
NAW-22	Job Simulation Payroll Reports 9905 Management Use Adults	Until No Longer needed for Administrative Purposes	No RC-3 required	Paper to Electronic then destroy paper		NAW
NAW-23	Memo Management Communication to Staff	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper	As needed	NAW
NAW-24	Monthly Documentation Error Tracking Management Use only	Until no longer needed for administrative purposes	No RC-3 required	Paper to Electronic then destroy paper	As needed	NAW
NAW-25	Morning Notes Distributed each day-can be destroyed each day. Original on PC network.	Until no longer needed for administrative purposes	No RC-3 required	Paper to Electronic then destroy paper	As needed	NAW
NAW-26	Multi Permission Form Adults	Permanent	N/A	Paper to Electronic then destroy paper	N/A	NAW
		7 Years from the date payment is received or until an initiated audit is resolved, whichever is		Paper to Electronic		
NAW-27	Daily Payroll Sheet (Adults)	longer	No RC-3 required	then destroy paper	As needed	NAW
NAW-28	Non Waiver Lists Management Use Only	Until No Longer needed for Administrative Purposes	No RC-3 required	Paper to Electronic then destroy paper	As needed	NAW
NAW-29	Oldman Road Acuity Update Form Management Use Adults	Until No Longer needed for Administrative Purposes	No RC-3 required	Paper to Electronic then destroy paper	1	NAW
NAW-30	Oldman Road Team List and Attendance Report Adults	Until No Longer needed for Administrative Purposes	No RC-3 required	Paper to Electronic then destroy paper	1	NAW
NAW-31	Quarterly Feedback on Habilitation Goals Adults	Permanent	N/A	Paper to Electronic then destroy paper	l .	NAW
NAW-32	Results of Environmental Safety Checklist Survey Adults	3 Years following current year	No RC-3 required	Paper to Electronic then destroy paper	As needed	NAW
NAW-33	Time Off Spreadsheet Management Use Only Adult Staff	Until No Longer needed for Administrative Purposes	No RC-3 required	Electronic	As needed	NAW
NAW-34	Title XX Age Calculation Spreadsheet	Until No longer needed for Administrative Purposes	No RC-3 required	Electronic	As needed	NAW
NAW-35	Title XX Documentation including Unit of Service Logs, Determination/Re-Determination sheets; Master Billing spreadsheet	7 Years from the date payment is received or until an initiated audit is resolved, whichever is longer	No RC-3 required	Paper to Electronic then destroy paper	As needed	NAW

	I	7 Voors from the data	1	1	<u> </u>	I
		7 Years from the date				
		payment is received or until				
		an initiated audit is				
		resolved, whichever is		Paper to Electronic		
NAW-36	Title XX Master billing Spreadsheet	longer	No RC-3 required	then destroy paper	As needed	NAW
		7 Years from the date				
		payment is received or until				
		an initiated audit is				
		resolved, whichever is		Paper to Electronic		
NAW-37	Title XX Unit of Service Logs	l. '	No PC 2 required	then destroy paper	Ve booded	INAW/
INAW-37	Title XX Offic of Service Logs	longer	No RC-3 required	then destroy paper	As fieeded	INAVV
				,		
		Until No Longer needed for		Paper to Electronic		
NAW-38	Transition Students Management Use Only	Administrative Purposes	No RC-3 required	then destroy paper	As needed	NAW
NAW-39	Time Sheets (Clients)	7 years	No RC-3 required	Paper/ Electronic	As needed	NAW
NU-1	Accident Report (staff)	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-2	Accident Report (student/adult consumers)	Permanent	N/A	Paper/ Electronic	N/A	Nursing
110 2	/ recident report (stadent) addit consumers)	remanent	1,47.	r aper/ Erectronic	14,71	T T T T T T T T T T T T T T T T T T T
NII 2	Assistant Donast/ Dlacd have a Dath asses	Downsons	NI/A	Daman/ Flactures	N1/A	Ni. maim m
NU-3	Accident Report w/ Blood borne Pathogens		N/A	Paper/ Electronic	N/A	Nursing
		Until obsolete or				
NU-4	AED Check Sheets	superseded	No RC-3 required	Paper/ Electronic	As needed	Nursing
NU-5	AIM's Test Forms (No longer being used)	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-6	Delegated Nursing Assessment	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-7	Delegation Permission Forms	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-8	Delegation Supervision Document	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-9	Emergency Medical Authorization	Permanent	N/A	Paper/ Electronic	N/A	Nursing
110-9	Efficiency Medical Authorization	remanent	IN/A	raper/ Liectronic	IN/A	Nursing
NU-10	Emergency Medical Authorization Form	Permanent	N/A	Paper/ Electronic	N/A	Nursing
	Emergency Medical Information Form					
NU-11	(EMF)	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-12	Enrollee Medical Evaluation	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-13	Health Summaries	Permanent	N/A	Paper/ Electronic	N/A	Nursing
	Introduction to Completion of Self	Until obsolete or				
NU-14	Medication Assessment instructions	superseded	No RC-3 required	Paper/ Electronic	As needed	Nursing
110 11	The discussion is a second the second		Tro tro o required	r aper, ziestrome	7.5	110131118
	Medical Assistance and Behavior Support					
NII 15		Downsons	NI/A	Daman/ Flactures	N1/A	Ni. maim m
NU-15	Assistance Rate Add On Assessment	Permanent	N/A	Paper/ Electronic	N/A	Nursing
	Medical Assistance of Behavior Support					
	Assistance Rate Add On Assessment FOR					
NU-16	WAIVERS	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-17	Medical Administration Records (MARS)	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-18	Medical Evaluation	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-19	Medical Evaluation WCBDD	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-20	Mobile Dentist Form	Permanent	N/A	Paper/ Electronic	N/A	Nursing
1.10 20	Progress Notes Nursing: includes med	. c.manent		. aper, Electronic	,,,,	. 10151116
NILL 24		Dormanont	IN/A	Danar/ Flacture:	NI/A	Nursia a
NU-21	records, nurse observations	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-22	Request for Medical Order	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-23	Seizure Protocol	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-24	Seizure Tracking Log	Permanent	N/A	Paper/ Electronic	N/A	Nursing
	Self Administration Assessment; Insulin &					
	Blood Glucose Monitoring; G-J Tube;					
NU-25	Glucometer	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-26	Self Medication Assessment	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-27	Staff Injury Reports	Permanent	N/A	Paper/ Electronic	N/A	Nursing
	Transfer of the control of the contr	Until obsolete or		. aper, Licetronic	,,,,	. 10151116
NILL 20	Statement of Delegation		No DC 2 magnified	Danar/ Flacture:	Ac no = d = -1	Nursing
NU-28	Statement of Delegation	superseded	No RC-3 required	Paper/ Electronic	As needed	Nursing
NU-29	Treatment Authorization Forms	Permanent	N/A	Paper/ Electronic	N/A	Nursing
					l .	
NU-30	Treatment Forms (Routine/Rescue/PRN)	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-31	First Aide & CPR Certification	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-32	Student Immunizations	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-33	RNQA	Permanent	N/A	Paper/ Electronic	N/A	Nursing
NU-34	Student Observation Forms	Permanent	N/A	Paper/ Electronic	N/A	Nursing
140-34	Stadent Observation Forms	r crimuniciit	1.475	aper, Licetionic	1.1/7	1141 SILIS
<u>.</u> .						<u> </u>
P-1	Application for Employment	2 years	No RC-3 required	Paper/Electronic	As needed	Payroll
P-2	Deferred Comp (OPERS) for staff	Permanent	N/A	Paper/Electronic	N/A	Payroll

P-3	Disability Insurance (Staff)	Permanent	N/A	Paper	N/A	Payroll
				Paper to Electronic	1	
P-4	Disciplinary Action (staff)	Permanent	N/A	then destroy paper	N/A	Payroll
D E	LUDAA Turining Vanification Chaff	20	N = DC 2 == == i== d	Dan au		D II
P-5	HIPAA Training Verification Staff	30 years	No RC-3 required	Paper	As needed	Payroll
P-6	Job Descriptions	2 years	No RC-3 required	Paper/Electronic	As needed	Payroll
1-0	Life Insurance policies (169 Board and	2 years	No NC-3 required	r aper/ Liectronic	Astriceded	Tayron
P-7	Wayne County)	Permanent	N/A	Paper/Electronic	N/A	Payroll
			.,,		,	
		Until obsolete or		Paper to Electronic		
P-8	Work Schedules(& expected locations)	superseded	No RC-3 required	then destroy paper	As needed	Payroll
P-9	Workers Comp Claims	Permanent	N/A	Paper/Electrinic	N/A	Payroll
	Personnel Files including: Dental Plan;					
P-10	Health Insurance; other benefits	Permanent	N/A	Paper	N/A	Payroll
P-11	Return to Work forms	Permanent	N/A	Paper	N/A	Payroll
D 42	Calama Calamatulan	2	N = DC 2 == == i== d	Dana a /Flantania		D
P-12	Salary Schedules	3 years	No RC-3 required	Paper/Electronic	As needed	Payroll
				Paper to Electronic		
P-13	Salary Contracts (Staff)	Permanent	N/A	then destroy paper		Payroll
1-13	Salary Contracts (Stair)	r crimunciit	19/5	men destroy paper	1.4/5	. ayron
				Paper to Electronic		
P-14	Staff Evaluations	Permanent	N/A	then destroy paper	1	Payroll
	Staff Legal includes judgments,			,,,,,,	<u> </u>	
P-15	garnishments, court orders, etc.	Permanent	N/A	Paper	N/A	Payroll
P-16	Staff Medical includes FMLA	Permanent	N/A	Paper	N/A	Payroll
	Vacation, Sick and Personal Time Off (Staff)					
P-17	VSP	Permanent	N/A	Paper/Electronic	N/A	Payroll
		7 years after an audit is				
P-18	WCBDD Payroll	completed	No RC-3 required	Paper/ Electronic	As needed	Payroll
DD 4	Duklia Danasıda Danıyantı	E VEADC	N = DC 2 == == i== d	Danas / Elastos dia		Records
RD-1	Public Records Requests	5 YEARS	No RC-3 required	Paper/ Electronic	As needed	Department Records
RD-2	Internal Records Requests	5 YEARS	No RC-3 required	Paper/ Electronic	As needed	Department
ND Z	Records Management Training Staff Sign In	3 TEARS	No Ne 3 required	ruper/ Electronic	Astriccaca	Records
RD-3	Sheets	Permanent	N/A	Paper/ Electronic	N/A	Department
						Records
RD- 4	Records Release Forms	Permanent	N/A	Paper/ Electronic	N/A	Department
						Records
RD-5	Records Shredding/ Disposal logs	Permanent	N/A	Paper/ Electronic	N/A	Department
	Records Retention and Disposition Form;					Records
RD-6				l .		
	RC-1, RC-2, RC-3	Permanent	N/A	Paper/ Electronic	N/A	Department
		Permanent	N/A			
	RC-1, RC-2, RC-3			Paper to Electronic		Department
SLP-1		Permanent Permanent	N/A N/A			
	RC-1, RC-2, RC-3 Meal Observation Form			Paper to Electronic then destroy paper	N/A	Department
SLP-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech	Permanent	N/A	Paper to Electronic then destroy paper Paper to Electronic	N/A	Department SLP
	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments			Paper to Electronic then destroy paper	N/A	Department
SLP-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech	Permanent	N/A N/A	Paper to Electronic then destroy paper Paper to Electronic	N/A	Department SLP
SLP-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver	Permanent Permanent	N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper	N/A N/A	Department SLP SLP
SLP-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver	Permanent Permanent	N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper	N/A N/A	Department SLP SLP
SLP-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver	Permanent Permanent	N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic	N/A N/A N/A	Department SLP SLP
SLP-1 SLP-2 SSA-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only	Permanent Permanent Permanent	N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper	N/A N/A N/A	SLP SSA
SLP-1 SLP-2 SSA-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary	Permanent Permanent Permanent Permanent	N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper	N/A N/A N/A	SLP SSA SSA
SLP-1 SLP-2 SSA-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only	Permanent Permanent Permanent	N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper	N/A N/A N/A	SLP SSA
SLP-1 SLP-2 SSA-1	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary Application for Guardianship Filing Fee	Permanent Permanent Permanent Permanent	N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper Paper to Electronic then destroy paper	N/A N/A N/A N/A	SLP SSA SSA
SLP-1 SLP-2 SSA-1 SSA-2 SSA-3	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary Application for Guardianship Filing Fee Application for Registration & Certification	Permanent Permanent Permanent Permanent Permanent	N/A N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper to Electronic then destroy paper	N/A N/A N/A N/A	SLP SSA SSA
SLP-1 SLP-2 SSA-1	Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary Application for Guardianship Filing Fee Application for Registration & Certification (HR Copy)	Permanent Permanent Permanent Permanent	N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper Paper to Electronic then destroy paper	N/A N/A N/A N/A	SLP SSA SSA
SLP-1 SLP-2 SSA-1 SSA-2 SSA-3	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary Application for Guardianship Filing Fee Application for Registration & Certification (HR Copy) Assessment to Determine Ability of	Permanent Permanent Permanent Permanent Permanent	N/A N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper to Electronic then destroy paper	N/A N/A N/A N/A	SLP SSA SSA
SLP-1 SLP-2 SSA-1 SSA-2 SSA-3	Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary Application for Guardianship Filing Fee Application for Registration & Certification (HR Copy)	Permanent Permanent Permanent Permanent Permanent	N/A N/A N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper	N/A N/A N/A N/A	SLP SSA SSA
SLP-1 SLP-2 SSA-1 SSA-2 SSA-3	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary Application for Guardianship Filing Fee Application for Registration & Certification (HR Copy) Assessment to Determine Ability of individuals with DD to give Informed	Permanent Permanent Permanent Permanent Permanent	N/A N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper to Electronic then destroy paper	N/A N/A N/A N/A	SLP SSA SSA SSA
SLP-1 SLP-2 SSA-1 SSA-2 SSA-3	RC-1, RC-2, RC-3 Meal Observation Form Swallowing Precautions/Speech Assessments Adult Acuity Instrument (AAI) Non-Waiver or Waiver Only Adult Services Discharge Summary Application for Guardianship Filing Fee Application for Registration & Certification (HR Copy) Assessment to Determine Ability of individuals with DD to give Informed	Permanent Permanent Permanent Permanent Permanent	N/A N/A N/A N/A N/A	Paper to Electronic then destroy paper Paper to Electronic then destroy paper Paper/Electronic Paper to Electronic then destroy paper	N/A N/A N/A N/A N/A	SLP SSA SSA SSA

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SSA-7	Behavior Plan Tracking Log	Permanent	N/A	Paper to Electronic then destroy paper		SSA
				Paper to Electronic		
SSA-8	Behavior Recording Documentation Adults Behavior Support Plan / Signatures &	Permanent	N/A	then destroy paper	N/A	SSA
SSA-9	Authorizations Behavior Support Plan / Signatures &	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-10	Authorizations	INACTIVE (DUPLICATE)	N/A	Paper/Electronic	N/A	SSA
SSA-11	Behavior Support Training Documentation	Permanent	N/A	Paper to Electronic then destroy paper	1	SSA
SSA-12	Case Notes: Targeted Case Management, Adult Services, or other written description of services provided to or on behalf of a client	Permanent	N/A	Paper/Electronic	N/A	SSA
	C-FED (Children's Form for Eligibility			Paper to Electronic		
SSA-13	Determination)	Permanent	N/A	then destroy paper		SSA
SSA-14	Checklist for Provider Choice Process	Permanent	N/A	Paper to Electronic then destroy paper	1	SSA
SSA-15	Child Medical Emergency Information	Permanent	N/A	Paper to Electronic then destroy paper		SSA
55.1.25	Children's Ohio Eligibility Determination		.,,	Paper to Electronic		
SSA-16	Instrument (COEDI)	Permanent	N/A	then destroy paper	N/A	SSA
SSA-17	Children's Ohio Eligibility Determination Instrument (COEDI) includes the items: COEDI answer sheet; Score sheet; Updates; User Guide	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-18	Chosen Representative for DD Services	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-19	Client Financial Information	Until superseded	No RC-3 required	Paper to Electronic then destroy paper		SSA
SSA-20	Client Rights Review and Sign Off Form	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-21	Consent for Psychological Services	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-22	Consent to Assess C-OEDI & OEDI	Permanent	N/A	Paper to Electronic then destroy paper	1	SSA
				Paper to Electronic		
SSA-23	Copy of Birth Certificate (enrollee)	Permanent	N/A	then destroy paper	N/A	SSA
SSA-24	Copy of Social Security Card (enrollee)	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-25	Criminal Affidavit	Permanent	N/A	Paper to Electronic then destroy paper		SSA
664.5				Paper to Electronic		
SSA-26	Daily Living Assessment	Permanent	N/A	then destroy paper		SSA
SSA-27	Day Services Request (wait list)	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-28	DoDD Individual Data System Summary	Permanent	N/A	Paper to Electronic then destroy paper		SSA

		1	1	1		1
				Paper to Electronic		
SSA-29	DoDD Individual Information Form (IIF)	Permanent	N/A	then destroy paper	N/A	SSA
SSA-30	DoDD Self Waiver Spending Plan JEVS	Permanent	N/A	Paper to Electronic then destroy paper		SSA
33A-30		remanent	N/A		IN/A	33A
SSA-31	Due Process Information; Information Receipt; State Hearing Information Receipt	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-32	Eligibility Re-Determination Letter	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-33	Eligible for Services letter	Permanent	N/A	then destroy paper	N/A	SSA
CCA 24	European Chatus Charles in the	Daniel and the state of the sta	21/2	Paper to Electronic		CC A
SSA-34	Emergency Status Classification	Permanent	N/A	then destroy paper	IN/A	SSA
SSA-35	Enrollee Profile	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
	Enrollment, Continued Enrollment and			Paper to Electronic		
SSA-36	Disenrollment Information Sheet	Permanent	N/A	then destroy paper	l .	SSA
				Paper to Electronic		
SSA-37	Expert Evaluation Form	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-38	Family Approval of Respite Provider	Permanent	N/A	then destroy paper	N/A	SSA
SSA-39	Family Member and Limited Provider Signature Sheet	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
		7 Years from the date	,	, , , , , , , , , , , , , , , , , , , ,	,	
		payment is received or until an initiated audit is				
SSA-40	Family Support Services Request Form	resolved, whichever is longer	No RC-3 required	Paper to Electronic then destroy paper	As needed	SSA
				Paper to Electronic		
SSA-41	FED (Form for Eligibility Determination)	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-42	Financial Information	Current Year	No RC-3 required	then destroy paper	As needed	SSA
664.40	Forms and instructions for Completion of			Paper to Electronic		
SSA-43	the Level of Care Packet Free Choice of Provider Process &	Permanent	N/A	then destroy paper	N/A	SSA
SSA-44	Information Free Choice of Provider Process &	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-45	Information	INACTIVE (DUPLICATE)	N/A	Paper/Electronic	N/A	SSA
SSA-46	Freedom of Choice Documentation	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-47	Functional Assessment Attachment F	Permanent	N/A	Paper to Electronic then destroy paper	l .	SSA
	Functional Assessment for Children under			Paper to Electronic		
SSA-48	the age of 6	Permanent	N/A	then destroy paper	N/A	SSA
	Future Planning for Parents of Children			Paper to Electronic		
SSA-49	with Disabilities	Permanent	N/A	then destroy paper	N/A	SSA
CC 4 50	Cuardian Application For	Dormanant	N/A	Paper to Electronic		CCA
SSA-50	Guardian Application Fee	Permanent	N/A	then destroy paper	IN/A	SSA
SSA-51	Guardian Report Form	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
35.131	12.2.2.2.2		1 7::	1	1 7	

	1	T	1	T	1	ı
				Paper to Electronic		
SSA-52	Guardianship Billing	Permanent	N/A	then destroy paper	N/A	SSA
337132	Guardiansing Simily	remanent	1477	then destroy paper	11,77	3371
		Until Updated or		Paper to Electronic		
SSA-53	Guardianship Brochure	superseded	No RC-3 required	then destroy paper	As needed	SSA
		Until Updated or		Paper to Electronic		
SSA-54	Guardianship in Ohio Information	superseded	No RC-3 required	then destroy paper	As needed	SSA
				Damas ta Flastsonia		
SSA-55	Guardianship Referral Form	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
337-33	Quartiansing Referral Form	remanent		then destroy paper	IN/A	33A
	HIPAA Your Individual Rights Notice of			Paper to Electronic		
SSA-56	Privacy Practices for Health Care Plans	Permanent	N/A	then destroy paper	N/A	SSA
	HIPAA Enrollee Notice of Privacy Practices			Paper to Electronic		
SSA-57	for Health Care Plans	Permanent	N/A	then destroy paper	N/A	SSA
CC 4 FO	LUDA A Deivision Browning	Downson	N1/A	Paper to Electronic	NI/A	CC A
SSA-58	HIPAA Privacy Promise	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-59	Home Safety Assessment	Permanent	N/A	then destroy paper	N/A	SSA
					,	
				Paper to Electronic		
SSA-60	Inactive/Active Service Status Agreement	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-61	Individual Assessment letter	Permanent	N/A	then destroy paper		SSA
SSA-62	Individual Information Form (IIF)	Permanent	N/A	Paper/Electronic	N/A	SSA
				Paper to Electronic		
SSA-63	Individual Specific Training Forms	Permanent	N/A	then destroy paper	N/A	SSA
3371 03	marviadar specime rraning roms	remanent	11,71	then destroy paper	11,77	33/1
				Paper to Electronic		
SSA-64	Individuals History with Interest Survey	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-65	Ineligible for Services letter	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-66	Initial Enrollment Checklist	Permanent	N/A	then destroy paper	l .	SSA
5571 55	Initial Level of Care Eligibility	- commune	.,,,,	lineir destroy paper	,,,	
	Determination Form: Initial Waiver			Paper to Electronic		
SSA-67	Application	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-68	Intake Checklist	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-69	Intake Face Sheet Referral to WCBDD	Permanent	N/A	then destroy paper	N/A	SSA
35.105			7	Land Look by paper	-,	
				Paper to Electronic		
SSA-70	Intake Instruction Sheet	Permanent	N/A	then destroy paper	N/A	SSA
	La La Vella de la Caracteria de la Carac			Paper to Electronic	.	
SSA-71	Intake/Eligibility Determination Letter	Permanent	N/A	then destroy paper		SSA
SSA-72	Inter-Departmental Referral ISP (Individual Service Plan): includes	Permanent	N/A	Paper/Electronic	N/A	SSA
	budget form; Pre-packet; Consent and sign					
SSA-73	in form; Adult Day Support sheets	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-74	ISP Monitoring/Review	Permanent	N/A	Paper/Electronic	N/A	SSA
				Paper to Electronic		
SSA-75	Level 1 Waiver Interviews Letter	Permanent	N/A	then destroy paper	t	SSA
SSA-76	Medicaid Documentation	Permanent	N/A	Paper/Electronic	N/A	SSA

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	Madiatid County days But annous OUES			B		
	Medicaid Spend down Program OJFS			Paper to Electronic	l .	
SSA-77	Application Letter	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-78	Medical Orders	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-79	Medication Form	Permanent	N/A	then destroy paper	N/A	SSA
	MUI Prevention Plan Training					
SSA-80	Documentation	Permanent	N/A	Paper/Electronic	N/A	SSA
				Paper to Electronic		
SSA-81	My Community Emergency Preparation List	Permanent	N/A	then destroy paper	N/A	SSA
	, , , , ,					
				Paper to Electronic		
SSA-82	My Interests Survey Favorites	Permanent	N/A	then destroy paper	N/A	SSA
33/102	inty interests survey ravorites	- Cimanent	1,47.	their destroy paper	11,71	3371
SSA-83	NEON Free Choice of Provider Brochure	Permanent	N/A	Paper/Electronic	N/A	SSA
33A-03	NEON Tree Choice of Frovider Brochare	Fermanent	IN/A	raper/Liectronic	IN/A	33A
	Noveletter and Undete Autolog Adults			Paper to Electronic		
664.04	Newsletter and Update Articles Adults	Dawn and	N1 / A	1 '		
SSA-84	Keep 1 copy permanently	Permanent	N/A	then destroy paper	IN/A	SSA
				Paper to Electronic		
SSA-85	Next of Kin & Waiver/Consent Form	Permanent	N/A	then destroy paper	N/A	SSA
	Nick Amster Workshop Recreation/Fitness	Until Updated or		Paper to Electronic		
SSA-86	& Leisure Survey	superseded	No RC-3 required	then destroy paper	As needed	SSA
				Paper to Electronic		
SSA-87	NICS Part 1 Form	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-88	NICS Part 2 Form	Permanent	N/A	then destroy paper		SSA
00/100			1.4	политический разрам	,	
				Paper to Electronic		
SSA-89	NICS Part 2 Instruction from DoDD	Permanent	N/A	then destroy paper		SSA
33A-03	INICS FAIT 2 INSTRUCTION FOR BODD	T ermanent	IN/A	then destroy paper	11/7	J374
CC 4 00	Non Madical Transportation	INIACTIVE (DUBLICATE)	No DC 2 required	Danar/Flastrania	NI/A	CC A
SSA-90	Non Medical Transportation	INACTIVE (DUPLICATE)	No RC-3 required	Paper/Electronic	N/A	SSA
		Until Updated or			l	
SSA-91	Notice of Privacy Practices Summary	superseded	No RC-3 required	Paper/Electronic	As needed	SSA
	ODJFS Combined Programs Application					
	including Explanation of State Hearing					
	Procedures; Prior Notice of Right to State					
	Hearing; Request for Cash, Food Stamp and			Paper to Electronic		
SSA-92	Medical Assistance;	Permanent	N/A	then destroy paper	N/A	SSA
	ODJFS Request for Medicaid Home and			Paper to Electronic		
SSA-93	Community Based Services	Permanent	N/A	then destroy paper	N/A	SSA
	ODMR/DD HCBS Waiver Redetermination:			Paper to Electronic		
SSA-94	No Significant Change	Permanent	N/A	then destroy paper	N/A	SSA
				,,,,,		
				Paper to Electronic		
SSA-95	ODMR/DD Loc Date Change Cover Sheet	Permanent	N/A	then destroy paper		SSA
	, see and a see a		†		<u> </u>	1
	1			Paper to Electronic		
i	ODMR/DD Notification of Individual		1 .	then destroy paper		SSA
SSΔ-06	ODMR/DD Notification of Individual	Permanent	IN/A			100/1
SSA-96	ODMR/DD Notification of Individual Change in Status (NICS)	Permanent	N/A	then destroy paper	11,71	
SSA-96	1		N/A		1477	
	Change in Status (NICS)	Until Updated or		Paper to Electronic		CCA
SSA-96 SSA-97	Change in Status (NICS) ODoDD Memo to SSA Directors		No RC-3 required			SSA
SSA-97	Change in Status (NICS) ODoDD Memo to SSA Directors Ohio Developmental Disability Profile	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper	As needed	
	Change in Status (NICS) ODoDD Memo to SSA Directors	Until Updated or		Paper to Electronic		SSA SSA
SSA-97	Change in Status (NICS) ODoDD Memo to SSA Directors Ohio Developmental Disability Profile	Until Updated or superseded Permanent	No RC-3 required	Paper to Electronic then destroy paper Paper/Electronic	As needed	
SSA-97	Change in Status (NICS) ODoDD Memo to SSA Directors Ohio Developmental Disability Profile	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper	As needed	

SSA-117	Professional Service Follow Up	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
33A-11D	Allegations of Mrk	reillanent	IN/A		IN/A	33A
SSA-116	Probate Court: includes Entry Dispensing with Bond, Inventory and Periodic Accounts; Guardian's Report; Judgment Entry; Letter of Guardianship; Next of Kin of Proposed Ward; Waiver of Notice and Consent; Statement of No Assets; Notice of Allegations of MR	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
SSA-115	PRN Orders	Permanent	N/A	then destroy paper	N/A	SSA
SSA-114	Prescreening Tool for Level 1 Waiver	Permanent	N/A	then destroy paper Paper to Electronic	N/A	SSA
		·		Paper to Electronic		
SSA-113	Preliminary Information For Free Choice of Provider Process	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper	As needed	SSA
SSA-112	Potential Guardians, letter to	5 years	No RC-3 required	Paper to Electronic then destroy paper	As needed	SSA
SSA-111	Physical restraint Log	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
SSA-110	Person Centered Programming Various Activities Adults	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-109	Payment Authorization for Waiver Services (PAWS) Start date 5/9/03 and after (electronic format	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-108	Payment Authorization for Waiver Services (PAWS) Start date 5/8/03 and before	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-107	PASRR Evaluation Summary (Pre-admission Screening and Resident Review)	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-106	Parent Guide to Family Services	Until Updated or superseded	No RC-3 required	Paper to Electronic then destroy paper		
SSA-105	On Site/On Call Assessment	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
SSA-104	On Call Log WCBDD	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
SSA-103	OJFS Medicaid Buy In For Workers with Disabilities (MBIWD) Addendum	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-102	Ohio's Individualized Family Service Plan	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-101	Ohio Help Me Grow: Includes Case Notes; Outcomes Form; Early Track System User's Agreement; Evaluation & Assessment Report; Family Plan; Referral Follow-Up; Surrogate Parent Consents; Documentation of Informed Clinical Opinion for DD; Prior Written Notice; Documentation of Diagnosed Condition; Contractor Application; Home visiting Program Contractor Application	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
SSA-100	Answer Sheet; Questionnaire, Score Sheet;	Permanent	N/A	Paper to Electronic then destroy paper	N/A	SSA
	Ohio Eligibility Determination Instrument (OEDI) Including the following items:					

	1	T	I	I	1	Γ
				Paper to Electronic		
SSA-118	Progress Notes TCM	Permanent	N/A	then destroy paper	N/A	SSA
33A-110	Trogress Notes Telvi	remanent	IN/A	then destroy paper	IN/A	337
	Protective Level of Care and ICF/MR Level			Paper to Electronic		
SSA-119	of Care Annual Review	Permanent	N/A	then destroy paper	N/A	SSA
				,, ,	-	
				Paper to Electronic		
SSA-120	Protective Level of Care Attachment B	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-121	Protective Level of Care Review Worksheet	Permanent	N/A	then destroy paper	N/A	SSA
		Until Updated or	l	Paper to Electronic		
SSA-122	Provider List Revision	superseded	No RC-3 required	then destroy paper	As needed	SSA
				Danis da Elastina di		
SSA-123	Doughistric Convices Contract form	Dormanant	NI/A	Paper to Electronic	NI/A	CCA
55A-123	Psychiatric Services Contract form	Permanent	N/A	then destroy paper	IN/A	SSA
				Paper to Electronic		
SSA-124	Psychological Evaluation	Permanent	N/A	then destroy paper	N/A	SSA
33A-124	1 37 SHOLOGICAL EVALUATION	remunciit	1.47	men destroy paper	13/7	55A
	PT and OT Evaluation tool-assessment			Paper to Electronic		
SSA-125	done every 3 years.	Permanent	N/A	then destroy paper	N/A	SSA
			<u> </u>	2 222.27 paper		
		Until Updated or		Paper to Electronic		
SSA-126	Q&A for Potential Guardians	superseded	No RC-3 required	then destroy paper	As needed	SSA
SSA-127	Quality of Life Review	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-128	Quality Services Review Tool	Permanent	N/A	Paper/Electronic	N/A	SSA
	Redetermination/Significant Change in			Paper to Electronic		
SSA-129	Condition Form	Permanent	N/A	then destroy paper	N/A	SSA
	Referral to Ohio's Help Me Grow Program			Paper to Electronic		
SSA-130	from PCSA	Permanent	N/A	then destroy paper	IN/A	SSA
				Paper to Electronic		
SSA-131	Referral for Guardianship	Permanent	N/A	then destroy paper		SSA
33A-131	Neterral for Guardianship	remanent	IN/A	then destroy paper	IN/A	337
	Release of Information (ROI) & Agreement	6 years from last effective		Paper to Electronic		
SSA-132	to Participate	date	No RC-3 required	then destroy paper	As needed	SSA
			·			
				Paper to Electronic		
SSA-133	Request to Close Case	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-134	Residential Needs Assessment	Permanent	N/A	then destroy paper	N/A	SSA
		7 Years from the date				
		payment is received or until				
		an initiated audit is				
SSΔ-12E	Respite Care Application	resolved, whichever is	No RC-3 required	Paper/Electronic	As needed	SSA
SSA-135	Respite Care Application	longer 7 Years from the date	ivo ic-s required	i ahei/EiectiOilic	As HEEGEG	33A
		payment is received or until				
		an initiated audit is				
		resolved, whichever is		Paper to Electronic		
SSA-136	Respite Timesheet Form	longer	No RC-3 required	then destroy paper	As needed	SSA
		-	, ,	,,,,,		
				Paper to Electronic		
SSA-137	Restraint Log (aversive)	Permanent	N/A	then destroy paper	N/A	SSA
				Paper to Electronic		
SSA-138	Return to Work forms (RTW) enrollees	Permanent	N/A	then destroy paper	N/A	SSA
CCA 422	Biolog Basisas		1,1/4	Paper to Electronic	 N. / A	
SSA-139	Rights Review	Permanent	N/A	then destroy paper	IN/A	SSA
				Paper to Electronic		
SSA-140	 Self Waiver JEVS Letter	Permanent	N/A	then destroy paper	N/A	SSA
3371-1 1 0	Joen Walver JEVO Letter	J. Crimanent	[17/7]	I men destroy paper	1.1/17	1997

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		Hartitla daka da a		Danish Flantssis		
		Until Updated or		Paper to Electronic	l	
SSA-141	Skills Assessment for Unsupervised Time	superseded	No RC-3 required	then destroy paper	As needed	SSA
			l .			
SSA-142	Special Olympics Participation Application	Permanent	N/A	Paper/Electronic	N/A	SSA
		Until Updated or		Paper to Electronic		
SSA-143	SSA Personal Calls Log	superseded	No RC-3 required	then destroy paper	As needed	SSA
				Paper to Electronic		
SSA-144	SSA Quality of Life Review	Permanent	N/A	then destroy paper		SSA
SSA-145	STAFF ACCIDENT REPORTS	INACTIVE (DUPLICATE)	N/A	Paper/Electronic	N/A	SSA
		Until No Longer needed for		Paper to Electronic		
SSA-146	Staff Error Tracking Management Use Only	Administrative Purposes	No RC-3 required	then destroy paper	As needed	SSA
				Paper to Electronic		
SSA-147	Telephone records	2 years after an audit	No RC-3 required	then destroy paper	As needed	SSA
	Things you need to know about me.			Paper to Electronic		
SSA-148	(Optional form)	Permanent	N/A	then destroy paper	N/A	SSA
		10 Years from the date				
		payment is received or until				
		an initiated audit is				
	Title XX Determination Re-Determination	resolved, whichever is				
SSA-149	Forms	longer	No RC-3 required	Paper/Electronic	As needed	SSA
		10 Years from the date				
		payment is received or until				
		an initiated audit is				
		resolved, whichever is				
SSA-150	Training Services Documentation Forms	longer	No RC-3 required	Paper/Electronic	As needed	SSA
	Transition Checklist to be done between	Until no longer needed for		Paper to Electronic		
SSA-151	providers	administrative purposes	No RC-3 required	then destroy paper	As needed	SSA
SSA-152	UIR (Old Form)	Permanent	N/A	Paper/Electronic	N/A	SSA
				1 '	,	
				Paper to Electronic		
SSA-153	Unsupervised Time Assessment	Permanent	N/A	then destroy paper	N/A	SSA
			,	, , , , , , , , , , , , , , , , , , ,	,	
				Paper to Electronic		
SSA-154	Wait List	Permanent	N/A	then destroy paper	N/A	SSA
SSA-155	Waiver	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-156	Waiver Assurance Checklist	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-157	Waiver Choice Verification Form New	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-158	Waiver Choice Verification Form Old	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-159	Waiver Waiting List Information Form	Permanent	N/A	Paper/Electronic	N/A	SSA
33.1.133	The state of the s		,	. sper, Electronic	,	
				Paper to Electronic		
SSA-160	Wayne County Board of DD Intake Checklist	Permanent	N/A	then destroy paper	N/A	SSA
35.1.100	Wayne County Board of DD Provider:		7	paper	-,	
SSA-161	Intake Face Sheet	INACTIVE (DUPLICATE)	No RC-3 required	Paper/Electronic	As needed	SSA
50. 1 101			o required	. sper, Electronic	. io necaca	- 51 ,
	Unusual Incident Report Forms Types &	Until No Longer needed for		Paper to Electronic		
SSA-162	Codes	Administrative Purposes	No RC-3 required	then destroy paper	As pooded	SSA
33A-10Z	Coucs	Administrative rulposes	INO INC-3 required	men destroy paper	As HEEGEG	33A
		Until obsolete or		Paper to Electronic		
SSA 162	Verification of Environmental Modification	superseded	No RC-3 required	then destroy paper	Ac pooded	SSA
SSA-163	vermeation of Environmental Mounication	Juperseueu	ivo ne-s required	men destroy paper	As HEEGEG	JJA
		Until Undated or		Danor to Floates:		
CCA 164	Volunteer Guardian Application	Until Updated or	No PC 3 required	Paper to Electronic	Ac pooded	SCA
SSA-164 SSA-165	Records of Ineligible Adults	superseded	No RC-3 required	then destroy paper		SSA SSA
	•	Permanent	N/A	Paper/Electronic Paper/Electronic	N/A	SSA
SSA-166	Records of Ineligible Children	Permanent	N/A	r aper/ Electronic	N/A	JJA
			1			
CCA 1.C7	HIDDA DELEACE OF INFORMATION FORMS	Darmanant	INI/A	Danar/Flaster!-	INI/A	lcc A
SSA-167	HIPPA RELEASE OF INFORMATION FORMS	Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-167		Permanent	N/A	Paper/Electronic	N/A	SSA
SSA-167	Attachment C Functional Assessment: Ages	Permanent	N/A		N/A	SSA
SSA-167 SSA-168		Permanent Permanent	N/A N/A	Paper/Electronic Paper to Electronic then destroy paper		SSA

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SSA-169	Attachment E Functional Assessment: Ages 12 through 15	Permanent	N/A	Paper to Electronic then destroy paper	1	SSA
SSA-170	Attachment F Functional Assessment: Ages 16 and above	Permanent	N/A	Paper to Electronic then destroy paper		SSA
SSA-171	NEON Residential Service Change Notice	Until Superseded	No RC-3 required	Paper/Electronic	As needed	SSA
SSA-172	Residential Support and Services Contract	7 Years After Adjudicated Audit	No RC-3 required	Paper/Electronic	As needed	SSA
TR-1	Bus Driver Records	Permanent	N/A	Paper/Electronic	N/A	Trans
TR-2	Bus/Van Daily Inspection Log	1 Year after vehicle is traded or disposed of	No RC-3 required	Paper to Electronic then destroy paper		Trans
TR-3	Driver Physical 2013 WCBDD	Permanent	N/A	Paper to Electronic then destroy paper		Trans
TR-4	Motor Vehicle Accident Report: Wayne County Board of DD	Permanent	N/A	Paper to Electronic then destroy paper		Trans
TR-5	Ohio Dept. of Education School Transportation Medical Exam Form	Permanent	N/A	Paper to Electronic then destroy paper		Trans
TR-6	Report of Violation of School Bus Red Lights	3 Years following current year	No RC-3 required	Paper to Electronic then destroy paper		Trans
TR-7	Transportation Department Sub Wage Request Form	5 Years	No RC-3 required	Paper to Electronic then destroy paper		Trans
TR-8	Transportation Work Orders/Vehicle Maintenance Documentation	1 Year after vehicle is traded or disposed of	No RC-3 required	Paper to Electronic then destroy paper		Trans
TR-9	Vehicle Inspection Reports (Ohio Highway Patrol)	Life of Vehicle	No RC-3 required	Paper to Electronic then destroy paper		Trans
TR-10	Vehicle Titles	Until vehicle is traded or disposed of	No RC-3 required	Paper to Electronic then destroy paper		Trans
TR-11	Wayne County Board of DD Provider: Non Medical Transportation (BILLING)	10 Years from the date payment is received or until an initiated audit is resolved, whichever is longer 7 Years from the date payment is received or until an initiated audit is	No RC-3 required	Paper/Electronic	As needed	Trans
TR-12	Community Employment Drivers Final Payroll Report	resolved, whichever is longer	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-13	Route Changes	Until Superseded	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-14	9 Month Routes	Until Superseded	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-15	12 Month Routes	Until Superseded	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-16	Summer Routes	Until Superseded	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-17	Route Information Sub Folder	Until Superseded	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-18	Van Condition Report (Includes Mileage)	7 Years after adjudicated audit	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-19	Call Off / Radio Check Sheet	3 years after current year	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-20	Driver Vehicle Inspection Report (Pre-Trip)	7 Years after adjudicated audit	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-21	Fuel Log	3 years after current year	No RC-3 required	Paper/ Electronic	As needed	Trans
TR-22	Driver Qualification Records (Physicals; Driving Records; Certifications)	Permanent	N/A	Paper/ Electronic	N/A	Trans