



# RECORDS ANALYSIS WORKSHEET

Agency Series Number
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ADMINISTRATIVE		Daily	Weekly	Monthly	Seldom	Never
How often is series referenced when records are this age?	1-3 years	<input type="checkbox"/>				
	4-5 years	<input type="checkbox"/>				
	Over 5 years	<input type="checkbox"/>				

LEGAL	
Has legal counsel been sought concerning any statutory or regulatory requirements affecting the retention of this record series?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are there statutes that specify a certain retention period?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
<input type="checkbox"/> Revised Code      Section No. _____ Retain _____ Years	
<input type="checkbox"/> Administrative Code      Section No. _____ Retain _____ Years	
<input type="checkbox"/> Other      _____ Retain _____ Years	

FISCAL	
Is this record series audited?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
If yes, by whom and how often?	
<input type="checkbox"/> State Auditor    Years _____	<input type="checkbox"/> Federal Audit    Years _____

HISTORICAL	
Does this record series have historical value?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know

CONFIDENTIAL	
Does this record series contain confidential information as defined by ORC 149.43?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
Explain _____	

VITAL	
Does this record series contain vital information? (Vital records are defined as those records that are necessary to resume agency functions in the event of a disaster.)	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Don't Know
Explain _____	

<b>Recommended Retention Period</b>
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**Retention Justification**

No record series should be scheduled for destruction for more than 5 years after its creation, or 5 years after an event without justification. Justification should also be provided for records listed as confidential or vital.

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Analysis Completed By	Date	Authorized Agency Official	Date
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