



Ohio History Connection
 State Archives of Ohio
 Local Government Records Program
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www.ohiohistory.org/lgr


Jul 17 2020

STATE AND LOCAL
 GOVERNMENT RECORDS

RECORDS RETENTION SCHEDULE (RC-2)– Part 1

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

Section A: Local Government Unit

County Auditor		Real Estate	
(Local Government Entity)		(Unit)	
	Karl L. Keith	County Auditor	
(Signature of Responsible Official)	(Name)	(Title)	(Date)

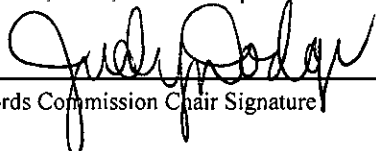
Section B: Records Commission

Montgomery County Records Commission		(937) 496-6932	
		(Telephone Number)	
117 S. Main Street, 6 th Floor	Dayton	45422	Montgomery
(Address)	(City)	(Zip Code)	(County)

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

ratcliff@mcoho.org

I hereby certify that our records commission met in an open meeting, as required by Section 121.22 ORC, and approved the schedules listed on this form and any continuation sheets. I further certify that our commission will make every effort to prevent these records series from being destroyed, transferred, or otherwise disposed of in violation of these schedules and that no record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. This action is reflected in the minutes kept by this commission.

	7-13-20
Records Commission Chair Signature	Date

Section C: Ohio History Connection - State Archives

	Local Government Records Archivist	7/27/2020
Signature	Title	Date

Section D: Auditor of State

Records Manager

Signature	Title	Date
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Please Note: The State Archives retains RC-2 forms permanently. It is strongly recommended that the Records Commission retain a permanent copy of this form

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2

See instructions before completing this form.

Auditor		Real Estate			
(Local Government Entity)		(Unit)			
(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
20-1	Board of Revision (BOR) Case Files: Notices, complaints and evidence resulting from BOR hearings.	4 years	Electronic/ Paper		<input type="checkbox"/>
20-2	Board of Revision (BOR) Hearing Audio Recordings: Audio record of tax appeal proceedings. Recorded on audio tape prior to 2010. Digital recordings from 2010 to present.	Permanent	Audio Tape/ Electronic		<input checked="" type="checkbox"/>
20-3	Board of Tax Appeals (BTA) Files: BOR cases that were appealed to BTA. Includes transcriptions of BOR Hearing Audio Recordings.	1 year after final disposition of case	Electronic/ Paper		<input type="checkbox"/>
20-4	Certifications: Certifications and records of special assessments received from taxing districts.	5 years	Electronic/ Paper		<input type="checkbox"/>
20-5	Conveyance Forms: Record of each sale passed through Deed Transfer.	Permanent	Electronic		<input checked="" type="checkbox"/>
20-6	Current Agricultural Use Value (CAUV) Files: Record of parcels with agricultural easements and special assessments.	2 years	Paper		<input type="checkbox"/>
20-7	Deed Transfer Lists: Obsolete. Record of deed transfers from 1994-1999. Arranged by parcel.	Permanent	Microfilm		<input checked="" type="checkbox"/>
20-8	Division Sheets: Records indicating owners' split of property. Permanently recorded with the County Recorder.	3 years	Electronic/ Paper		<input type="checkbox"/>
20-9	Global Information System (GIS): System of data mapping that shows property lines and property ownership within the county. Used to determine real estate tax assessment. Continually maintained and updated.	Permanent	Electronic		<input type="checkbox"/>
20-10	Homestead Exemption Files: Annual applications for exemption/deduction from taxation.	2 years	Paper		<input type="checkbox"/>

Section E: RECORDS RETENTION SCHEDULE (RC-2) – Part 2*See instructions before completing this form.*

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(Local Government Entity)		(Unit)			
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20-11	Incinerator Delinquent Charge List: Record of penalties to be placed on a property.	3 years	Electronic		<input type="checkbox"/>
20-12	Integrated Assessment System (IAS): System that integrates all property information pertaining to real estate tax assessment. Contains the description, sales history and value of each parcel within the county. Also includes information on tax additions, deductions, exemptions, penalties and special assessments. Continually maintained and updated.	Permanent	Electronic		<input type="checkbox"/>
20-13	Land Sale Record: Record of land sold or forfeited by Auditor or Sheriff. Permanently recorded with the County Recorder.	3 years	Electronic		<input type="checkbox"/>
20-14	Pay-Ins: Copies of pay-ins for conveyance fees collected.	1 year	Paper		<input type="checkbox"/>
20-15	Pay-In Ledger: Record of pay-ins for fees collected.	1 year	Paper		<input type="checkbox"/>
20-16	Property Record Working Files: Documents used to update IAS.	6 years	Paper		<input type="checkbox"/>
20-17	Real Estate Tax Abstract: Report sent annually to Auditor of State. Contains tax rates for the county, municipalities and special taxing districts. Maintained electronically since 2019.	Permanent	Electronic/ Microfilm/ Paper		<input checked="" type="checkbox"/>
20-18	Real Estate Tax Duplicate (1820-1998): Obsolete. General real estate tax list since 1820. Paper from 1820 to 1896. Microfilm from 1820 to 1998. Arranged alphabetically or by parcel. Includes Delinquent Tax Duplicate.	Permanent	Microfilm/ Paper		<input checked="" type="checkbox"/>

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Auditor

Real Estate

(Local Government Entity)

(Unit)

(1) Schedule Number	(2) Record Title and Description	(3) Retention Period	(4) Media Type	(5) For use by Auditor of State or LGRP	(6) RC-3 Required by LGRP
20-19	Resolutions for Tax Increment Financing (TIF) and Abatements: Legislation passed by local jurisdictions for TIF parcels and/or abated parcels.	Permanent	Electronic		<input checked="" type="checkbox"/>
20-20	State Reports: Copies of conveyance reports sent to the State of Ohio.	5 years	Electronic		<input type="checkbox"/>
20-21	Tax Maps (1920-1998): Obsolete. Maps containing parcel and transfer information.	Permanent	Microfilm/ Paper		<input checked="" type="checkbox"/>
20-22	Special Assessment Records: Recording of special assessments placed on real estate.	Permanent	Microfilm/ Paper		<input checked="" type="checkbox"/>