



Records Management for the Treasurer's Office

Understanding Retention, Disposition,
and Everything In-Between



DAVE YOST

OHIO ATTORNEY GENERAL

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- Senior Records Manager at Ohio Attorney General's Office
- Member of the Ohio Electronic Records Committee
- Masters in Public History and Library & Information Science
- Information Governance Certification through ARMA International

Objectives

Importance of
Records Mgmt.

What is a
Records
Retention
Schedule?

When and How
can a Record be
Destroyed?

Managing
Records

Managing Email
Records

Why Is Records Management Important?

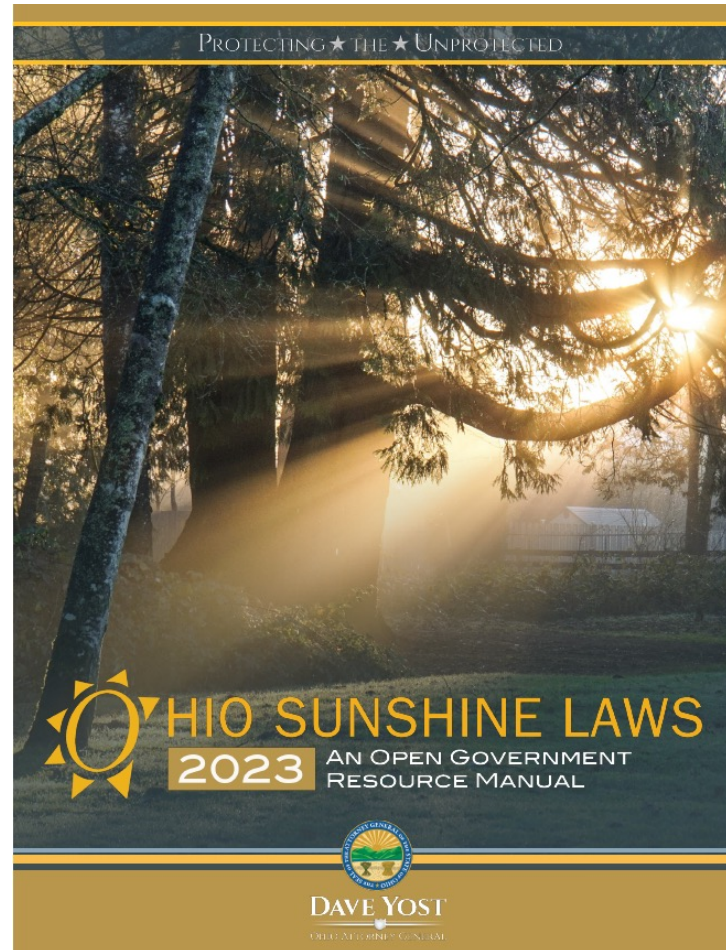
1. Manage Volume
2. Improve Work Efficiency
3. Maintain Compliance with Laws & Regulations
4. Save on \$
5. Strengthen Defensibility



Public Records and Records Management

- Records Retention crucial to compliance with Public Records Law
 - Retention Schedules provides list a records office keeps and for how long.
 - If cannot produce that which we are supposed to have, could result in financial penalties.
 - Public Records Requests are records themselves than need to be retained
- Public Record Exemptions in ORC 149.43.

Public Records and Records Management



Obligations to Rules and Regulations



- How long should these records be kept for?
- Do you have a secure storage for this info?
- What system or procedures will help “flag” records with sensitive or confidential information?
- Will you be audited on how you retain these records?

Office Policies and Procedures

Policy/Procedure

Things to Consider:

- Policies lay out expectations on how records are to be handled
- Set procedures build consistency and defensibility in your practices
- Employee separations to include exit procedures for records they leave behind

Examples:

- Records Management Policy
- Up-to-Date Retention Schedules
- Record Disposal Procedures and Disposal Form
- HR Policy
- Public Records/FOIA Policy
- Computer Use/Technology Policies

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What is a "Record"?

(ORC 149.011)



Stored on a Fixed Format: Paper, computer files, emails, microfilm, photos, audiovisual files, etc.

Created, received or sent under jurisdiction of public office

Serves to Document: Organization, Procedures, Functions, Operations, Policies, Decisions, Other activities

All records, public or not, are subject to records management and retention laws.

Convenience, Transient, and Non-Record Definitions

Convenience Copies

- Copies of Official Records
- Copies of reports, publications, submitted HR/Finance Forms, etc.
- Printout of an electronic file in your network

Transient Documents

- Docs of temporary importance
- Drafts, phone msgs/faxes, meeting requests & scheduling, notes
- Technically a Record of the Office; needs schedule

Non-Records

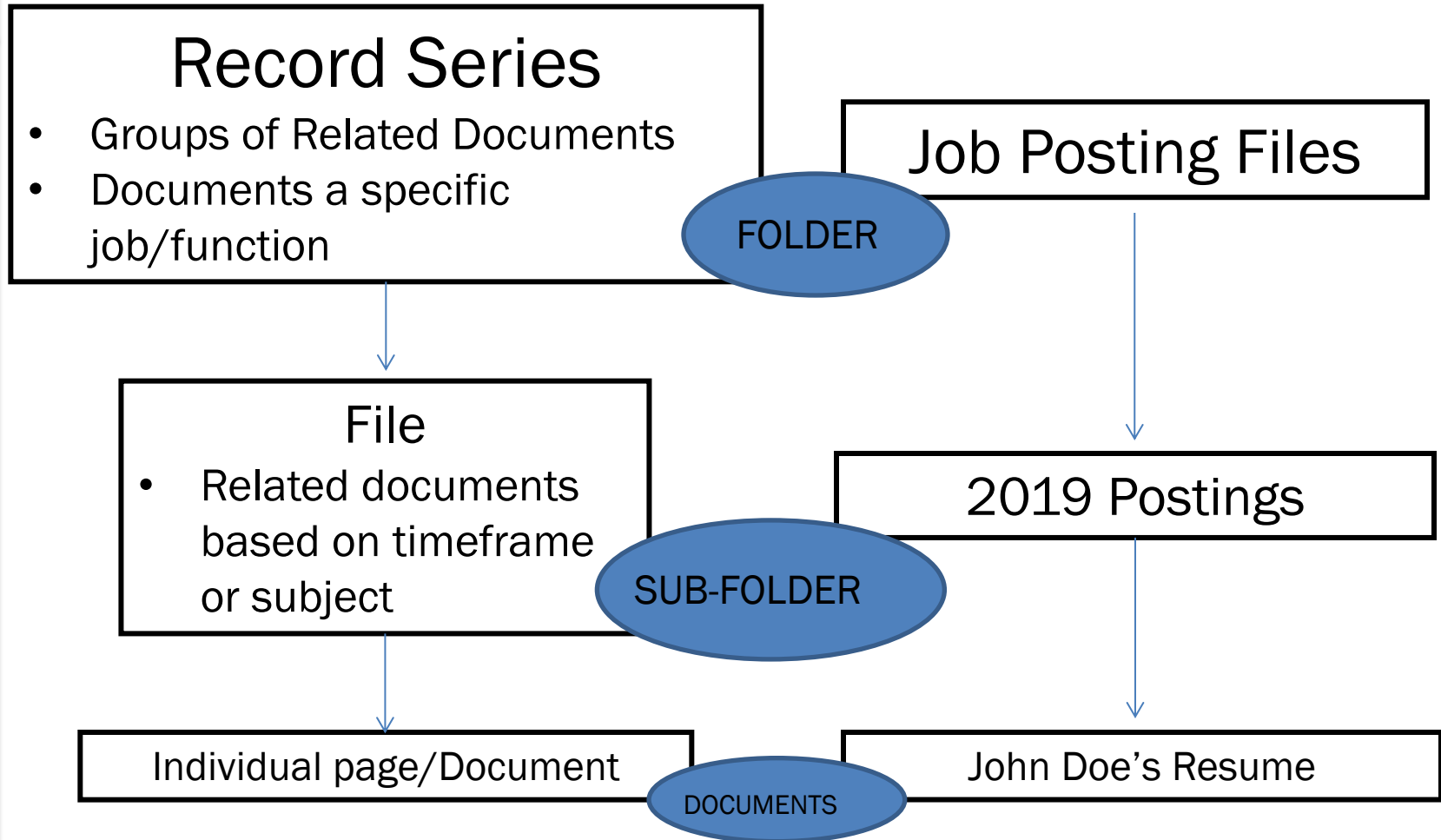
- Not a record as defined by ORC 149.011(G)
- Personal items, charitable events, financial disclosures, spam, etc.

Records Retention Schedule

- *Mini policies* for retaining groups of records in the office:
 - Describes the *purpose* and/or *function* of the record(s)
 - Tells what *types of information* is found in the series
 - Ids how long those records should be kept based on their *value*.
- We retain our records based on the CONTENT of the record, not the creator or format.



Record Series/Record Groups

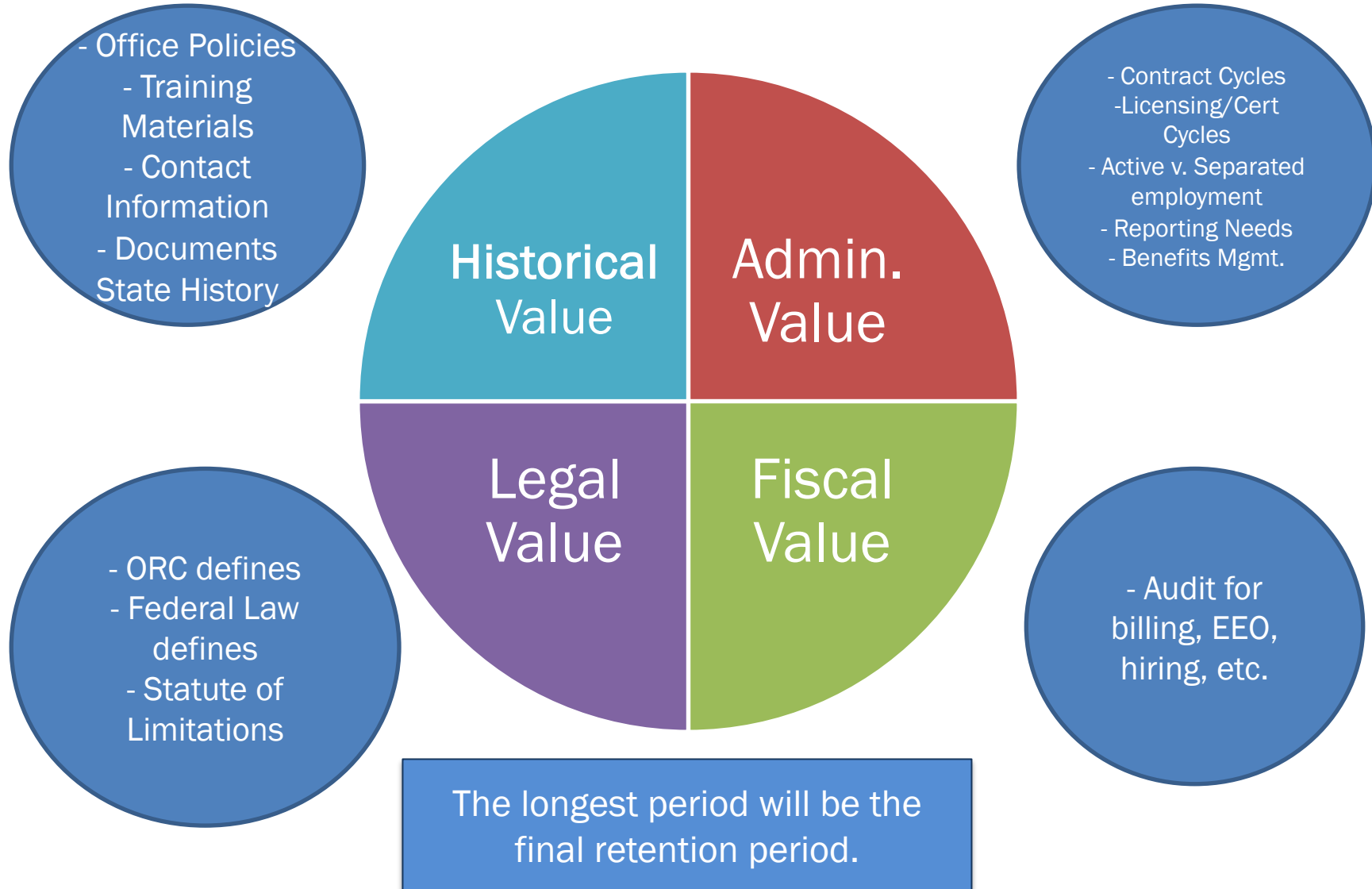


Define Your Record Series

- Bank Statements
- Delinquent Tax lists
- Forfeitures and Foreclosures
- Records of Official's Bonds
- Settlements
- Unclaimed Funds List
- Public Records Requests
- Annual Reports
- Office Policies
- Communication Records
- Personnel Files
- Job Postings/Hiring Records

Avoid squeezing too many record series into one group. This may lead to management and retention issues when you have too many series in one "bucket".

Determining Retention Periods



Implementing Records Retention Periods

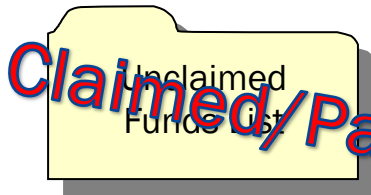
Time



**Retain
3 Years**



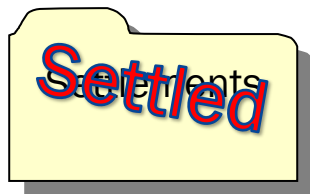
Event/Status



**Until accts
claimed or
paid to
treasury**



Time + Event/Status



**Retain 5
years after
settlement**



RC-2 Form (Records Retention Schedule - ORC 149.38)



Ohio History Connection
State Archives of Ohio
Local Government Records Program
809 E. 17th Avenue
Columbus, Ohio 43211-2497

OHIO HISTORY CONNECTION

NOV 18 2020

STATE AND LOCAL
GOVERNMENT RECORDS



Ohio History Connection
State Archives of Ohio
Local Government Records Program
809 E. 17th Avenue
Columbus, Ohio 43211-2497

RECORDS RETENTION SCHEDULE (RC-2) – Part 1

SEE INSTRUCTIONS BEFORE COMPLETING THIS FORM. MUST BE SUBMITTED WITH PART 2

Section A: Local Government Unit (To complete this form online, use "tab" key to jump from box to box.)

All Trumbull County Agencies/Boards/Departments/Offices (Local Government Entity)		Trumbull County General Retention Schedule (Unit)	
<i>Lynn Wallace-Smith</i> (Signature of Responsible Official)	Lynn Wallace-Smith (Name)	Records Manager (Title)	10/29/2020 (Date)

Section B: Records Commission

Trumbull County Records Commission (Records Commission)		330.675.2518 (Telephone Number)	
160 High ST (Address)	Warren (City)	44481 (Zip Code)	Trumbull (County)

To have this form returned to the Records Commission electronically, include an email address:
rswallac@co.trumbull.oh.us

This General Retention Schedule applies to all county departments and agencies under the jurisdiction of the Trumbull County Records Commission. It neither modifies nor supersedes any specific departmental or agency schedule already approved by this commission.

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.

[Signature] 11/18/20
Records Commission Chair Signature Date

Section C: Ohio History Connection – State Archives

<i>[Signature]</i> Signature	Local Government Records Archivist Title	12/1/2020 Date
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Section D: Auditor of State

Martin E. Meeks
Digitally signed by Martin E. Meeks
Date: 2020.11.04 13:47:06 -0500

Signature Date

THIS GENERAL SCHEDULE DOES NOT MODIFY OR SUPERSEDE ANY DEPARTMENT SPECIFIC SCHEDULE APPROVED BY THE COUNTY RECORDS COMMISSION AND DOES NOT SUPERCEDE RULE 26 IN THE RULES OF SUPERINTENDENCE

RECORDS RETENTION SCHEDULE (RC-2) – Part 2

Section E: Records Retention Schedule

Trumbull County County General Retention Schedule (GRS)
(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 OHS-LGRP	(6) RC-3 Required by OHS-LGRP	(7) RC-3 Required by Trumbull County Records Commission
GRS-1	Accident Reports/Files Report of personal injury or property damage involving a county vehicle or occurring on county property. (Transfer reports of Blood Borne Pathogen/Hazardous Material Exposure/ Workers Compensation Claims to Human Resources)	6 years, provided no action pending. Maintain one copy of employee injury report in personnel file	Paper and/or Electronic		<input type="checkbox"/>	<input checked="" type="checkbox"/>
GRS-2	Accrual/Usage Reports Report of vacation, sick, compensatory, and personal time balance by employee. (Departmental copy, original held by Auditor's Office.)	1 Year (Departmental copy, original held by Auditor's Office.)	Paper and/or Electronic		<input type="checkbox"/>	<input type="checkbox"/>
GRS-3	Agendas of Board/Executive Meetings A list of items to be discussed and/or acted upon during a regular or special meeting.	2 Years	Paper and/or Electronic		<input type="checkbox"/>	<input type="checkbox"/>
GRS-4	Annual Reports Report containing substantive information of operations, policies, procedures, and planning.	Until Microfilmed	Paper and/or Electronic		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
GRS-5	Applications for Employment – Unsuccessful/Not Hired Application submissions for open job positions not chosen for employment, including unsolicited resumes.	1 year, after receipt	Paper and/or Electronic		<input type="checkbox"/>	<input checked="" type="checkbox"/>

THIS GENERAL SCHEDULE DOES NOT MODIFY OR SUPERSEDE ANY DEPARTMENT SPECIFIC SCHEDULE APPROVED BY THE COUNTY RECORDS COMMISSION AND DOES NOT SUPERCEDE RULE 26 IN THE RULES OF SUPERINTENDENCE

Review Your Schedules

- Schedules will become obsolete or need to be updated
- Business needs and laws will change which will require reviewing your schedules
 - Review by dept./function
- Consider creating “General/Bucket” retention schedules for those records any dept. may create and then have dept.-specific schedules for those functions only certain folks may create.



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Records Destructions

- Defensible Destruction is KEY
 - Id eligible disposals
 - Authorized and documented
- Records on hand are either:
 - Those that have not met retention yet.
 - Those needed for a public records request.
 - Those being audited.
 - Those on legal hold for your legal counsel.
- Avoid Dumpster Days



Obsolete Records

- During a file review or inventory, you may find records that are not ongoing and/or no longer created.
- These records should be listed on an Application for ***One-Time Records Disposal of Obsolete Records (RC-1 Form)***



RC-3 Form (Certificate of Destruction)



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

For State Archives – LGRP Use Only

Date Received:

Date Reviewed:

Items requested for transfer: YES NO

If YES, attach copy of transfer form

CERTIFICATE OF RECORDS DISPOSAL (RC-3) – Part 1

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

(Local Government Entity) (Unit) (Contact Person) (Telephone Number) (Location of Records)

(Address) (City) (Zip Code) (County) (Date Mailed to LGRP)

I hereby certify that the records listed on this RC-3 and attachments are being disposed of according to the time periods stated on the approved Records Retention Schedules (RC-2) listed below. No record will be knowingly disposed of which pertains to any pending legal case, claim, action or request. In addition, microfilm created in place of any original record listed on this RC-3 will be stored according to ANSI Standards and all microfilm master negatives will only be used to create use copies. It is a responsibility of the local government to ensure the preservation and accessibility of any records retained in electronic format.

(Signature of Responsible Official) (Title) (Telephone number)

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

Please Note: The State Archives retains RC-3 forms for seven years.
It is strongly recommended that the Records Commission retain a permanent copy of this form.

Differences Between RC Forms

RC-1 Form (One-Time Disposal)

- Optional if needed for Records not on an RC-2 and no longer created
- Good for 1 time disposal of specific records listed
- **Requires** dates to document

RC-2 Form (Retention Schedule)

- Mandatory (ORC 149.38 & 149.43(B)(2))
- Defines group of records and retention period
- Used for ongoing disposals
- **Requires** RC-2 to be approved to allow all future submitted RC-3 forms for that record series

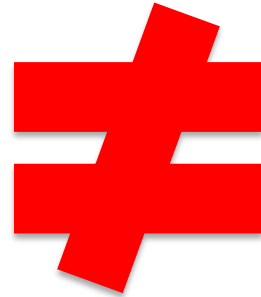
RC-3 Form (Certificate of Destruction)

- **Requires** RC-2 form stating RC-3 form is required to dispose records (ORC 149.381(B))
- Can submit via email to Records Commission
- OHC may contact you to collect/transfer to Archives
- If records not wanted by OHC, disposal could move forward

Keep in Mind with Record Destructions



A Note about Storage Media/File Format



Record Series

Retention Period

In fact, the determined retention period may ultimately play a role in determining the best storage media for a particular record series

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Places we Store Records

Physically

- Storage Rooms
- Offices
- *Closet*
- *Under a desk*
- *Filing cabinets in the hall*
- *Basements*
- *Corner of the warehouse*
- *Etc. Etc. Etc.*

Electronically

- Shared Drives
- Outlook mailboxes
- *Desktop and Local Drives*
- *Portable Media (flash drives, CDs, portable hard drives)*
- *Social Media accounts*
- *Personal Email account*
- *Text Messages*
- *Teleconferencing records*

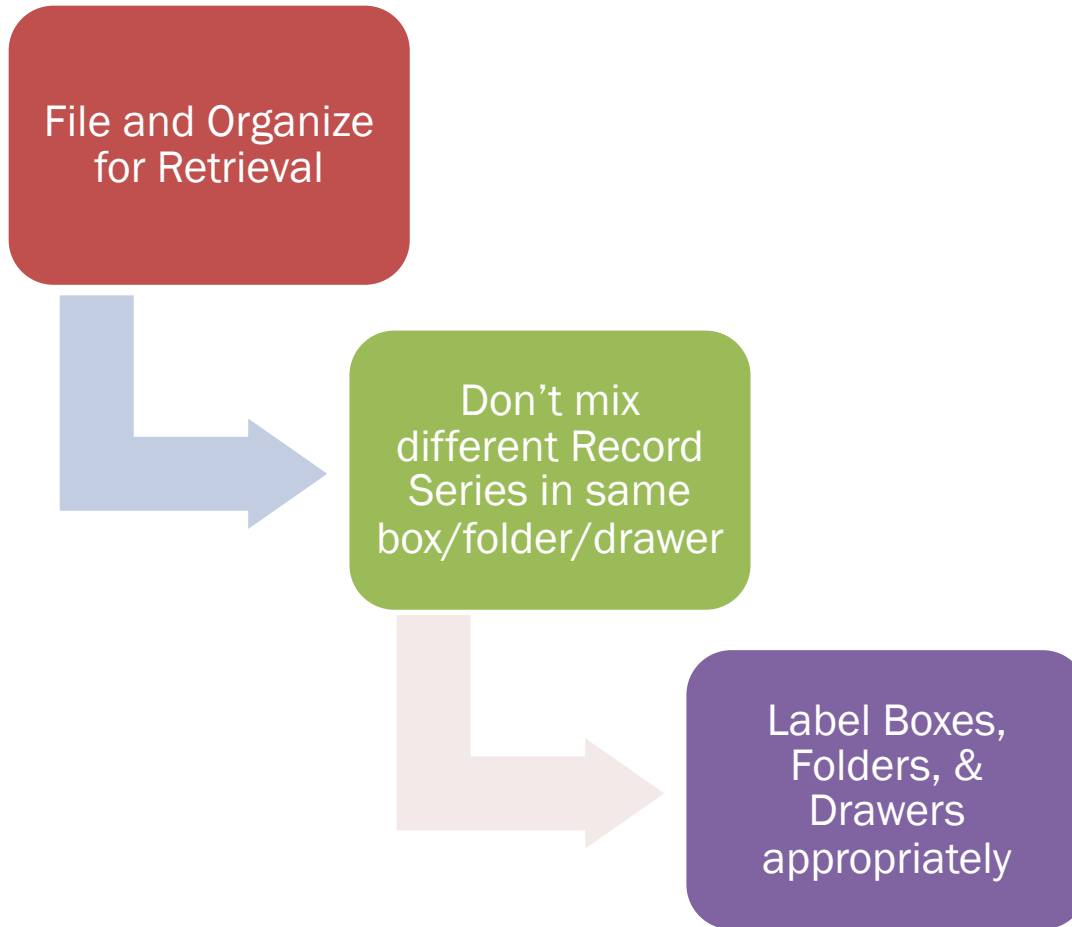
Records Inventory

- Goal: Get your records organized and identified
- Do not leave any records out of the inventory
 - Including convenience/reference copies
 - Gather information at the record series/record group level, not item or owner level
 - Identify where and how these records are retained

Data Map

- Category
- Location
- Custodian or steward
- How it is stored
- Its accessibility
- Associated retention policies and procedures

Records Organization



Box Labels

Series: Contracts

Dates: July 2016-June 2017

Destruction: July 1, 2023

Access Restrictions: Public

Series: Bank Statements

Dates: July 2016-June 2017

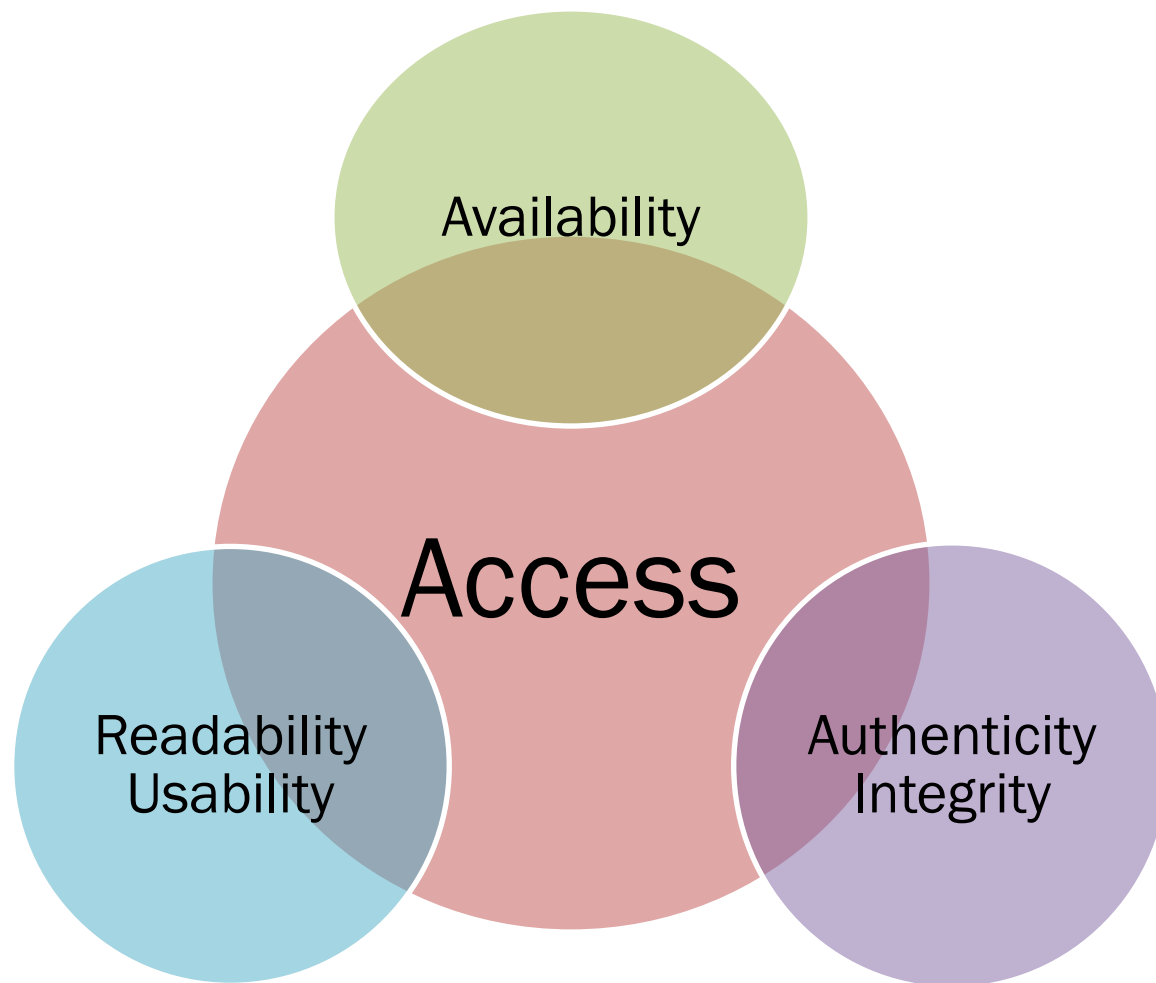
Destruction: July 1, 2020

Access Restrictions: May contain confidential information protected by state and federal law.

File Room Management

- When new boxes are added to the file room or records center
 - Be sure that an approved retention schedule exists for those records. If it doesn't, work to get one developed & approved.
 - Label boxes with basic information
 - Tell the Records Manager/Records Officer
 - If available, barcode boxes and use scanner to track locations
- Do Not simply dump boxes without notifying someone and/or labeling.
 - Liability concern of not knowing what is in there
 - Security concern if records need more secured access

Ensuring Access to Electronic Records



Goal 1: Availability

The record is kept for its full retention period.



Goal 2: Readability/Usability

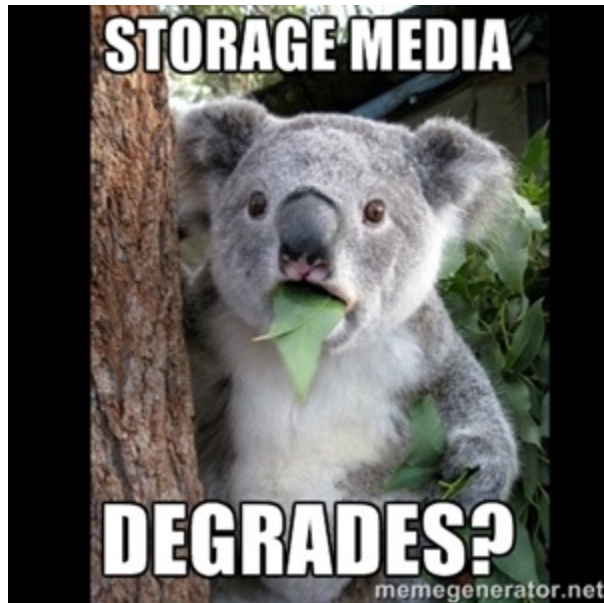


Goal 3: Authenticity/Integrity

- Record is what it claims to be
- Record is complete
 - All metadata
- Need audit trails
 - What was changed
 - By whom
 - When
 - Documentation of migration(s)



What Does this all Mean?



- Technology will change.
- Media will degrade.
- It's your job to make sure that the electronic records are still **available**, **readable**, and **authentic** – until they meet retention.

Issue with Shared Drives

2004 Clean-Up Project

Case Emails

Correspondence

John Doe

Nathan Owens

Pari Swift

Records Coordinators

Administration

Case Files

In process Projects

Memos

New folder

Past AGs

Reports

AG Matt Smith

Closed Case Files

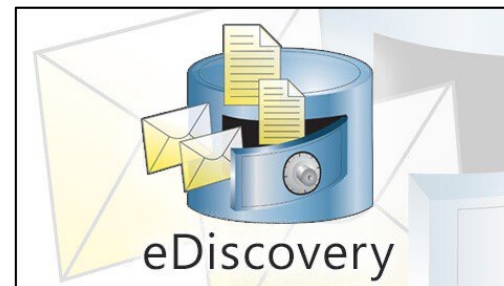
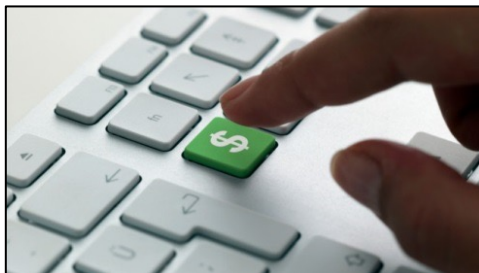
John Contonio

Miscellaneous

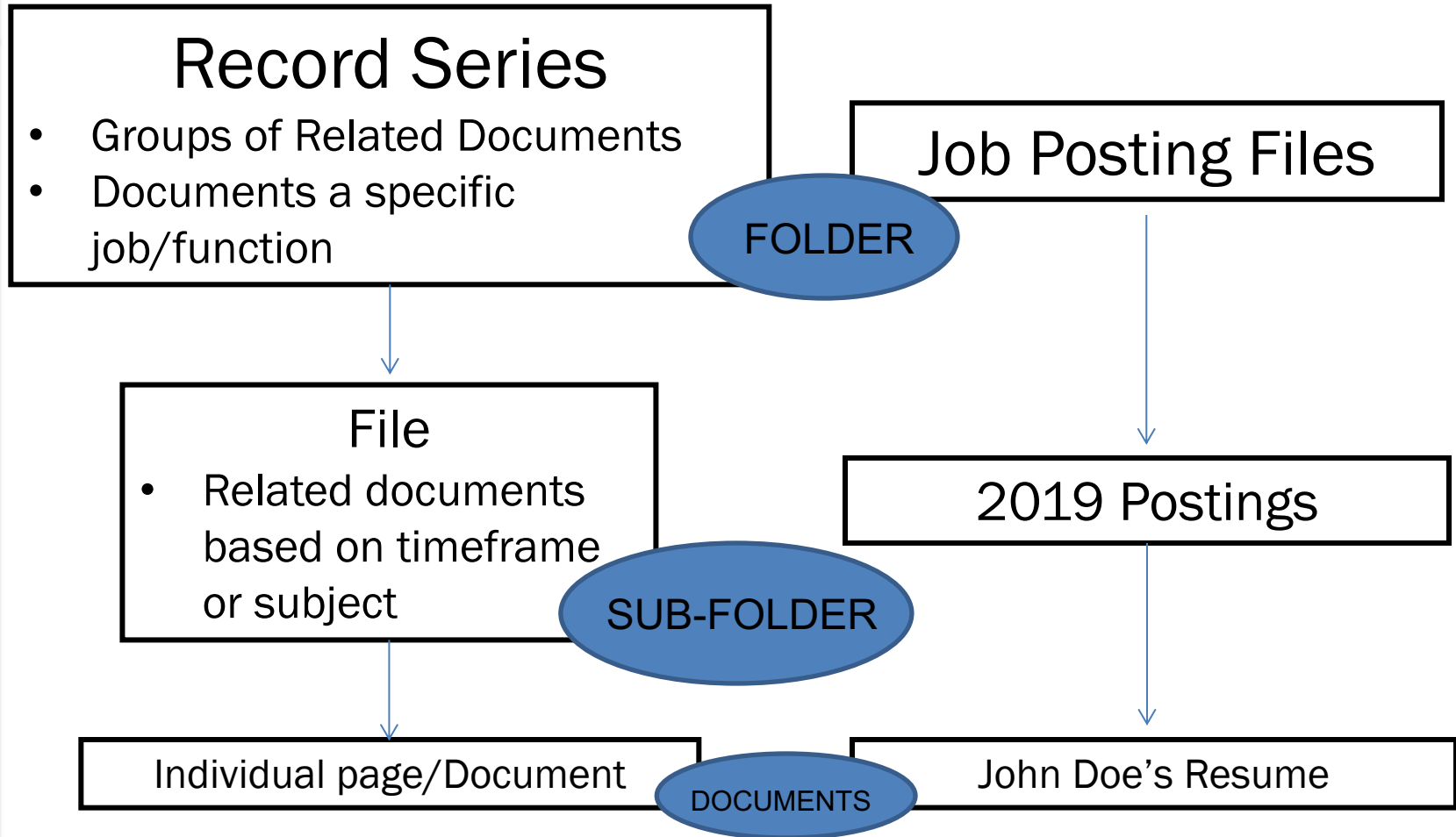
New folder (2)

Projects

Research



Define Your Record Series



Filing E-records

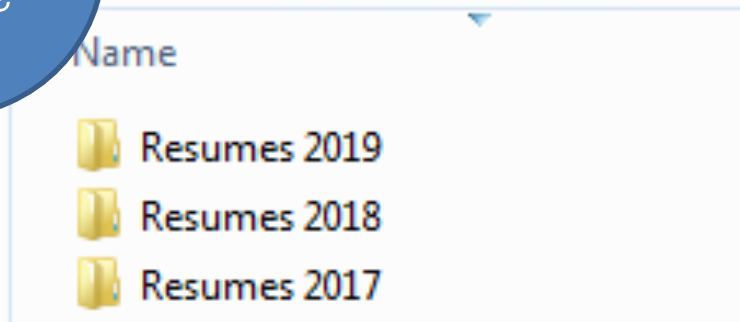
Folder Structure

- Create clear filing structures on Shared Drives that everyone in the dept. can access
 - Think about filing for retrieval rather than creation
 - Folders are like index fields per record group per year/status
- Incorporate records retention schedules into the folder names
 - Title of Folder = Title of Record Series (Per retention schedules)
- Subfolders can aid in organization, retention and disposition
 - When retention expires on a folder, right clicking once deletes all contents

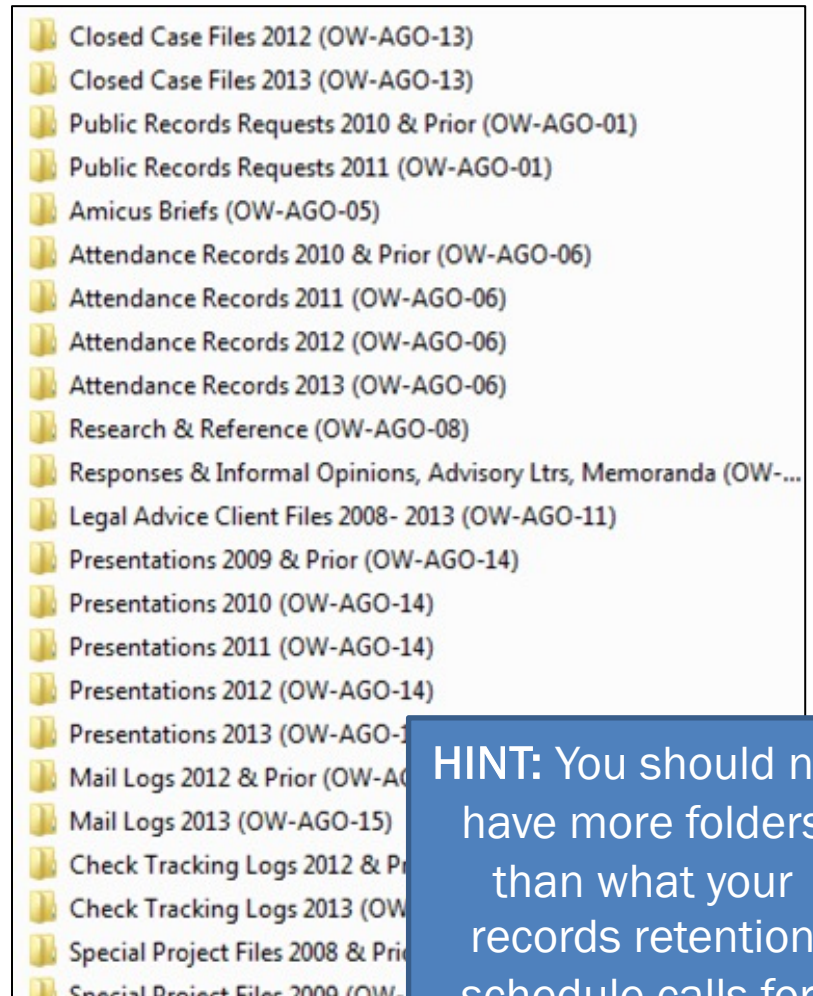
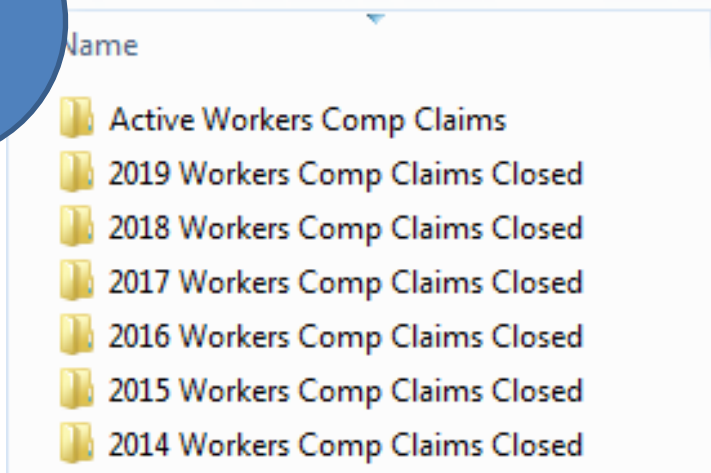
Not Unlike Managing Paper Files

Functional Filing

Retention based on Time



Retention based on Status



HINT: You should not have more folders than what your records retention schedule calls for.

Naming Conventions

Electronic Documents

- Descriptive file names & naming conventions
 - **Good**: Memo_Office_Move or Jones_Amy_recommendation
 - **Bad**: Memo1 or AB_Case
- Same structures to date file names
 - 2011_03_28 -or- 20110328
 - Helps with sorting
- Note Draft v. Final Draft
- Consistency is KEY

Emails

- Email subject lines should be:
 - Meaningful
 - Descriptive
- Benefits
 - Prioritize reading
 - Efficient filing
 - Faster retrieval
 - Meaningful file name

Scanning to Electronic Formats

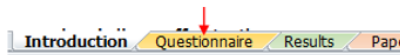


- Accessibility to info critical with a decentralized work environment.
- Employee leave or transitions can greatly impact access to information more.
- Can't just simply throw into scanner but requires some consistent procedures.

Ohio Electronic Records Committee Scanning Feasibility Tool

To use the Tool:

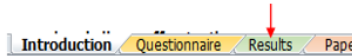
1. Click on the "Questionnaire" tab of this Excel file.



2. Fill in the letter choice for each question in the yellow boxes of the "Questionnaire" tab.

Answer

3. Once filling in all of the questions of the "Questionnaire" tab, click on the "Results" tab to see the recommendation.



Answers		Points	Answer Explanation
1.	A	1	If you access the record(s) less than once a year, then retaining the record(s) in its current format is usually the best option. Changing the format for a document you view less than once a year is usually not recommended when compared to the cost of changing formats.
2.	B	2	If the records have a retention period of 1 to 10 years and are frequently accessed, it may be worth considering scanning the records. Properly digitized records should remain accessible in a 1 to 10 year period if not corrupted or lost. However, retaining the records in a file room or off-site records storage location could potentially be less expensive than spending time and money on a scanning project, so the costs need to be compared.

Electronic Record Storage Best Practices

Avoid if Possible

- Storing to Local Drive
- Using personal computers or cloud storage accounts to store work of office
- Using personal cell phone or email to msg about office business
- Keeping paper files at home

- Save to the Office Network
- Use office-issued computers or cloud storage accounts to store records of office
- Use office- issued cell phones or forward texts to office email account
- Return files to office when not in use or have them scanned

Best Practice

You Might Not Realize This Are Records

Text Messages

Instant
Messages/TEAMS
chats

Video Recordings

Social Media
Records

Websites

Databases

Social Media Challenges

- 3rd Party, Proprietary Platforms
- Dynamic, real-time, ever changing
- Access controlled by vendor and user, not government
- Once posted, likely available forever



Social Media Records

- Posted on or Created by Social Media
 - Press Releases
 - Event/Public Service Announcements
 - Safety Alerts/Reporting
 - Live Speech Tweets
 - Public Meeting Notices
 - Video Recordings
 - Public feedback through comments
- Created Because of Social Media Use
 - Username/Password Logs
 - Social Media Engagement Plan
 - Terms of Service Agreements
 - Disclaimer, Authorization or Justification of Use Records
 - Procedure to remove inappropriate comments

Ohio Electronic Records Committee Social Media Online Training Module



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Email Management

Subdivision of Records Management

- Ensure that emails are available when needed
 - Internally for office functions (*completes the story*)
 - Public records requests
 - Discovery
- Protect emails from improper or unauthorized destruction
- Ensure that emails are not retained unnecessarily
 - Destroy emails when retention period has expired

Retaining emails/records too long can be as much of a liability as not retaining them for long enough.

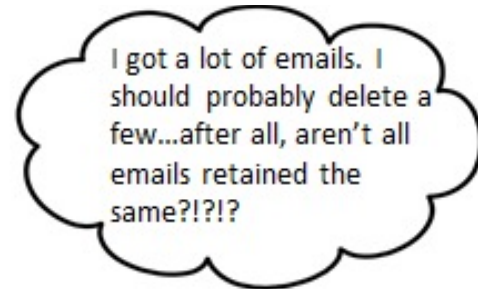
Email Management

IS NOT...

- Saving all email forever
- Managing based on available mailbox size
- Setting arbitrary time limits for all messages
- Declaring email a record series and treating all the same

IS

-



statutory authority to dispose records

office

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Email Clean-Up Strategies

- Don't attempt to do it all at once
- Set aside a regular time to file. Smaller chunks are more manageable and less tedious.
 - Every Friday 4:00-5:00
 - Every day 1:00-1:15
- Delete what you know can be deleted
- File what you know must be retained
 - According to record retention schedules

Convenience, Transient, and Non-Record Definitions

Convenience Copies

- Copies of Official Records
- Copies of reports, publications, submitted HR/Finance Forms, etc.
- Printout of an electronic file in your network

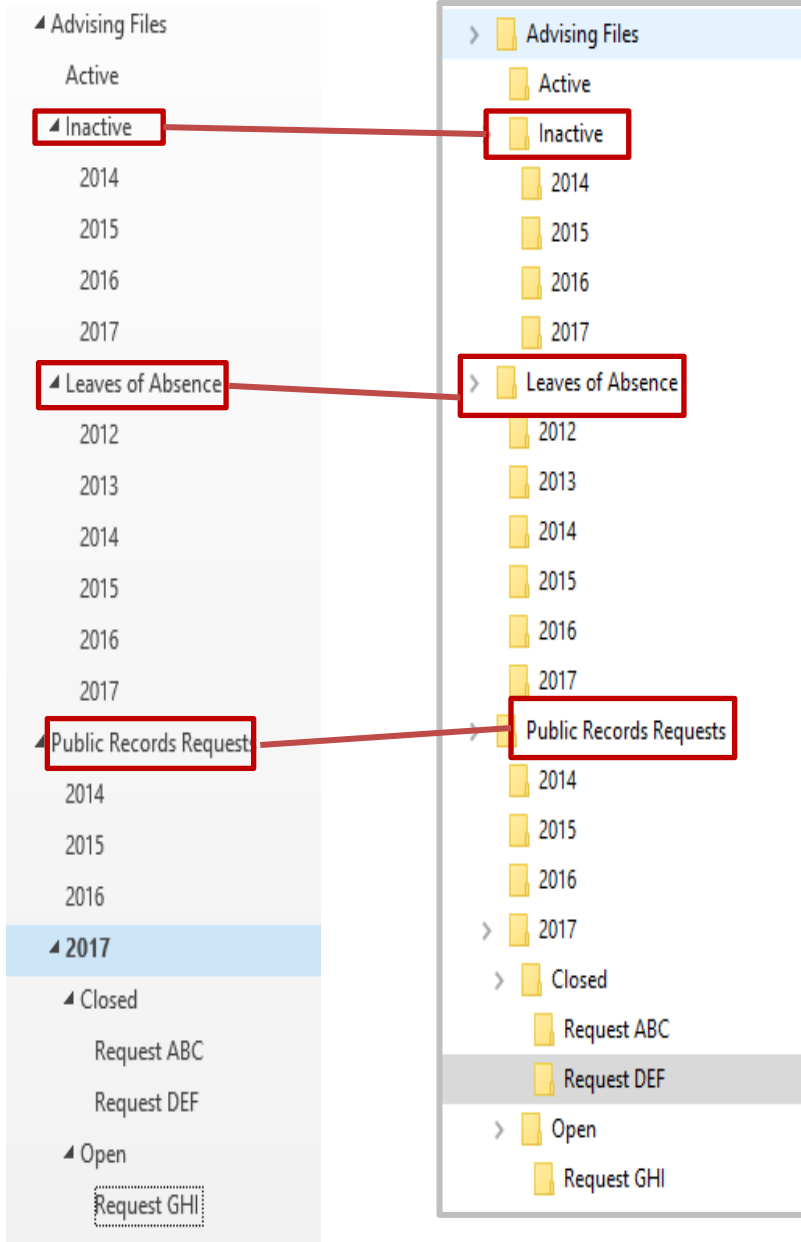
Transient Documents

- Docs of temporary importance
- Drafts, phone msgs/faxes, meeting requests & scheduling, notes
- Technically a Record of the Office

Non-Records

- Not a record as defined by ORC 149.011(G)
- Personal items, charitable events, financial disclosures, spam, etc.

Structuring Outlook



Structuring File Shares

Four Record Email Categories

1. “Matter” Specific Correspondence *Retention Varies*
2. General Correspondence *Retain 1 Year*
3. Executive Correspondence *Retain 3 Years & Appraise*
4. Non-Record/Transient Correspondence *Delete ASAP*

Email Category # 1: “Matter” Specific Correspondence

- Emails concerning cases, investigations, projects, initiatives, public records requests, presentations, etc.
- Emails should be filed to the most specific matter possible. Organize so all records on a subject will be found in the same place; ease for gathering for PRR or discovery.



Identifying the Official Copy (*Sent Mail*)



Official Copy if Recipient (*Inbox Mail*)

Email received from external source



Needed to take action based on message



Emails of data used to compile project



Email Category # 2: General Correspondence

- Retention Period: 1 Year
- Defined: Documents the operations of the office and may include non-routine requests for information. Informative and does not attempt to influence policy.
- Provide or direct recipient to the information or answer
- Internal business-related correspondence that could be done over the phone
- Correspondence to bring attention to an issue (FYI)
- Responses that are one-time answers; proof you answered
- Work order/ service requests

Email Category # 4: Non-Record/Transient Records

Non-Record

- Does not meet definition of a “record” under ORC 149.011
- Avoid using your email for personal use if possible
- Your non-record emails may be produced in discovery if your email account is responsive

Always think back to 3 pt. definition of a “Record”. If not meeting that definition, delete it.

Transient Records

- Meets the definition of “record” under ORC 149.011
- Have short-term usefulness
- Do not set policy, establish guidelines or procedures, certify a transaction or become a receipt
- Often used in lieu of oral communication

Transient Documents/Correspondence should have a Records Retention schedule in place as they are technically a record of the office.

Some Emails DON'T need to go to be Saved

Non-Record and Transient Emails

- **SPAM/Unsolicited email**
 - Ads, news articles, non-work-related mail
- **Personal (non-record)**
 - Ready for lunch
 - Pick up milk
 - Late meeting, can you get kids?
- **Distributed (not by you) to multiple people for administrative purposes**
 - Schedule your flu shot
 - Kitchen cleaning today!
 - Charitable events
 - Office-Wide Mailers
- **Listservs**
 - Newsletters/Bulletins
 - Other professional communities for information sharing
- **Transient**
 - Accepted/Declines meeting requests
 - “read” receipts
 - Meeting arrangements
 - Non-substantive messages of short-term usefulness
 - CC/BCC messages
 - Minutes, notes, drafts, agenda that you received for information, but you are not record-keeper
 - “Thank you!”
- **Convenience Copies / CC / BCC**

Email Threads

Keep all emails or just the last one?

ALL

- Someone doesn't reply all
- Off topic
- Someone responds to earlier email
- Ability to edit
- Retain attachments

Last

- If it's not needed as evidence
- Transient

Option: PDF
all emails
from a thread
into a single
document

Save the email or just the attachment?

Search Sent Items (Ctrl+E)

Arrange By: Date | Newest on top

Today

Jennifer Duvall

Search Inbox (Ctrl+E)

Arrange By: Date | Newest on top

Work Order Number 29189

ITSSupport

ITS believes your request

ITSSupport

[Ohioer] To Scan o

Fred Previts

FW: Document

Orlando Ashle

Work Order

Search RM General Correspondence (Ctrl+E)

Arrange By: Date | Newest on top

Nathan Owens 1/18/2018

Nate's Access to 150 E. Gay

Nathan Owens RE: 1/17/2018

Cathy Kirby RE: 1/17/2018

Nathan Owens RE: 1/17/2018

Nathan Owens RE: DAS Contact for RM 1/17/2018

Yesterday

Mark J. Smith; Anupam Srivastava ... Records Retention Schedules f...

Paula Boggs Mon 2:50 PM Records Retention Schedules f...

Kristina K Hagberg (Kristina.Hagb... Records Retention Schedules f...

RE: Outside Audit Reports and Office Responses.nrl

Nathan Owens

Sent: Fri 1/26/2018 1:25 PM

Nathan Owens

Christina Frass

2 Year Delete (2 years) Expires: 1/26/2020

Side Audit Reports and Office Responses.pdf (256 KB)

electronically, it made me save it locally.

Monday, January 29, 2018.

Review Instruction's Nate is Drafting

Nathan Owens

Sent: Fri 1/12/2018 10:17 AM

To: Carol Ottolenghi (carol.ottolenghi@ohioattorneygeneral.gov); Angie Crandall (Angie...)

Retention Policy: 2 Year Delete (2 years) Expires: 1/12/2020

Message Administration Off-Site Box List_20180112.XLSX (104 KB) Reviewing

Morning All,

Sorry to be a bother, but if you all have the time today, can you review this of the office should review their records in storage? Basically the process w

2. Application Log- application by users.

a. Retention Period - Retain 7 years...

b. Part of my concern is over the Application ...

After Saving Email to a Shared Drive...

Drive...

Delete it from Outlook



Ohio Electronic Records Committee Online Email Management Training Series



Resources

- Ohio History Connection/State Archives – Local Government Records Program (www.ohiohistory.org/lgr)
 - Provides suggested retention periods for local government records
- Ohio Electronic Records Committee (<http://www.OhioERC.org>)
- Ohio County Archivists and Records Managers Association (<https://www.ohiohistory.org/research/local-government-records-program/county-archivists-records-management-association/>)

Resources

- Ohio Electronic Records Committee Guidelines/Tip Sheets/Trainings
 - Email Management
 - Social Media Records
 - Databases as Records
 - Text Message Retention
 - Online Conferencing Platforms
 - Document Imaging
 - Blockchain Technology



How to contact us

Nathan Owens

Senior Records Manager

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Nathan.Owens@OhioAGO.gov



DAVE YOST

OHIO ATTORNEY GENERAL