



Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board

77 South High Street, 16th Floor
Columbus, Ohio 43215-6108

Governor
Mike DeWine
Executive Director
Missy Anthony

OTPTAT Records Retention Policies

General State records retention can be found at <https://apps.das.ohio.gov/rims/General/General.asp>

OTPTAT Public Records Custodian:

Missy Anthony, Executive Director

614-466-3774

missy.anthony@otptat.ohio.gov



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Series
Authorization No: 885-0001 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: OTPTAT-01

Record Series Title: Licensure File

Record Series Description: Record of all approved licenses and supporting documentation.

Agency Web Link: <http://otptat.ohio.gov>

Confidential Description

Vital Description

These records contain important historic information regarding the licensee's eligibility for licensure, including exam scores and educational records.

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 60 years or until electronically scanned	Licensee records must be maintained for the potential life of the licensee to assist with verifications to other state licensing boards.	Shred
Machine Readable	Retain electronically scanned files for 60 years from date the record is scanned	Licensee records must be maintained for the potential life of the licensee.	Delete

Approvals:

Created		Date: 9/14/2006
Approved	Martin Meeks, State Auditor	Date: 6/23/2008
Approved	Jeffrey Rosa, Records Officer	Date: 12/19/2011
Approved	Michael Hardenbrook, Record Administrator	Date: 12/19/2011
Approved	Fred Previts, State Archivist	Date: 12/21/2011

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Series
Authorization No: 885-0002 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: PYT-02 **Record Series Title:** CEU Course Applications
Record Series Description: These are records of all applications received for approval of continuing education courses.
Agency Web Link:

Confidential Description	Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 2 years, then destroy	Retain the application to cover the biennial renewal period in case the Board needs to review specific information in the approved course.	Wastepaper

Approvals:

Created		Date: 12/21/2007
Approved	Jeffrey Rosa, Records Officer	Date: 12/21/2007
Approved	Michael Hardenbrook, Record Administrator	Date: 1/3/2008
Approved	Martin Meeks, State Auditor	Date: 1/4/2008
Approved	Jelain Chubb, State Archivist	Date: 3/12/2008

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Series
Authorization No: 885-0003 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: OTPTAT-03 **Record Series Title:** Failed Applications
Record Series Description: These are applications for licensure where applicant failed the examination.
Agency Web Link: <http://otptat.ohio.gov>

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 1 year, then destroy	No value at Conversion	Shred

Approvals:

Created		Date: 12/19/2011
Approved	Jeffrey Rosa, Records Officer	Date: 12/19/2011
Approved	Michael Hardenbrook, Record Administrator	Date: 12/30/2011
Approved	Martin Meeks, State Auditor	Date: 12/30/2011
Approved	Fred Previts, State Archivist	Date: 12/30/2011

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Series

Authorization No: 885-0004

Agency: PYT

Division: NA

Section: NA

Revision: 0

Agency Series No.: OTPTAT-04

Record Series Title: Denied Applications

Record Series Description: These are applications that were denied by the board for not meeting the minimal qualifications for licensure.

Agency Web Link:

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 6 months, then destroy	No value at Conversion	Wastepaper

Approvals:

Created

Date: 1/8/2001

Approved

Transfer User, Records Viewer

Date: 1/8/2001

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Series
Authorization No: 885-0005 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: PYT-05 **Record Series Title:** Incomplete Applications

Record Series Description: These are applications for licensure that failed to provide all the documentation required for approval.

Agency Web Link:

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain for 1 year after the date the application was received by the Board, then destroy.	Board policy is to keep incomplete applications open for 1 year.	Shred

Approvals:

Created		Date: 12/21/2007
Approved	Jeffrey Rosa, Records Officer	Date: 12/21/2007
Approved	Michael Hardenbrook, Record Administrator	Date: 1/3/2008
Approved	Martin Meeks, State Auditor	Date: 1/4/2008
Approved	Jelain Chubb, State Archivist	Date: 3/11/2008

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Series

Authorization No: 885-0006

Agency: PYT

Division: NA

Section: NA

Revision: 2

Agency Series No.: OTPTAT-06

Record Series Title: Records of Investigations

Record Series Description: This series consists of complaint forms used to file complaints against licensees and non-licensed persons, along with investigative reports, notes, statements, and evidence, including exhibits submitted at hearing and the transcript of an administrative hearing. It does not include notices for opportunity for hearing, consent agreements, and/or adjudication orders.

Agency Web Link: <http://otptat.ohio.gov>



Confidential Description

Vital Description

The records contained in this series are confidential pursuant to R.C. 4755.02 (E).

Media	Retention Period	Retention Justification	Method of Disposal
Paper	If case is closed with no action taken, retain in office area for 5 years after closure date, then destroy. If action is taken, retain in office area for 10 years after the date of the action, then destroy. Do not destroy any notices for opportunity for hearing, consent agreements, and/or adjudication orders, since those documents have historic and reference value.	Records need maintained for a period of time following the completion of the investigation in case of future complaints against the licensee. If no action taken, legal counsel stated that there is little value in the records after 5 years. For those disciplined, the records maintain value for a longer time period. After 10 years, the confidential case materials are of no use if there are subsequent investigations into that licensee.	Shred

Approvals:

Created		Date: 12/19/2011
Approved	Jeffrey Rosa, Records Officer	Date: 1/5/2012
Approved	Michael Hardenbrook, Record Administrator	Date: 1/17/2012
Approved	Martin Meeks, State Auditor	Date: 1/17/2012
Approved	Fred Previts, State Archivist	Date: 1/18/2012

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Series
Authorization No: 885-0007 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: OTPTAT-07 **Record Series Title:** Inspections

Record Series Description: These are records of on-site inspections.

Agency Web Link:

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 3 years, then destroy		Wastepaper

Approvals:

Created **Date:** 1/8/2001
Approved **Transfer User, Records Viewer** **Date:** 1/8/2001

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Series
Authorization No: 885-0008 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: OTPTAT-08 **Record Series Title:** Investigation Summary for Board Review
Record Series Description: These are summaries of investigations, on-site inspections, and consent agreements for enforcement review panel review.

Agency Web Link: <http://otptat.ohio.gov>

Confidential Description **Vital Description**

The records contained in this series are confidential pursuant to R.C. 4755.02 (E).

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 1 year, then destroy	No value at Conversion	Shred

Approvals:

Created		Date: 12/19/2011
Approved	Jeffrey Rosa, Records Officer	Date: 12/19/2011
Approved	Michael Hardenbrook, Record Administrator	Date: 12/30/2011
Approved	Martin Meeks, State Auditor	Date: 12/30/2011
Approved	Fred Previts, State Archivist	Date: 12/30/2011

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Series
Authorization No: 885-0009 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: OTPTAT-09 **Record Series Title:** Denied/Failed/Incompetete Applications - Foreign Tra
Record Series Description: These are records of applications from individuals who were educated outside the United States and whose applications were not approved. These records need to be retained for a longer period because of the difficulty in obtaining much of the information in the case of re-application.

Agency Web Link:

Confidential Description	Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 3 years, then destroy	No value at Conversion	Shred

Approvals:

Created		Date: 9/14/2006
Approved	Jeffrey Rosa, Records Officer	Date: 9/14/2006
Approved	Michael Hardenbrook, Record Administrator	Date: 10/5/2006
Approved	Martin Meeks, State Auditor	Date: 10/11/2006
Approved	Steve Gutgesell, State Archivist	Date: 10/31/2006

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Series
Authorization No: 885-0010 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: OTPTAT-10 **Record Series Title:** Supporting Documentation without Submitted Application

Record Series Description: This is supporting documentation received without an application being received.

Agency Web Link: <http://otptat.ohio.gov>

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 1 year, then destroy	No value at Conversion	Shred

Approvals:

Created		Date: 12/19/2011
Approved	Jeffrey Rosa, Records Officer	Date: 12/19/2011
Approved	Michael Hardenbrook, Record Administrator	Date: 12/30/2011
Approved	Martin Meeks, State Auditor	Date: 12/30/2011
Approved	Fred Previts, State Archivist	Date: 12/30/2011

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Series Authorization No: 885-0011 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: OTPTAT-11 **Record Series Title:** Exam Scores

Record Series Description: These are scores from exam for licensure.

Agency Web Link:

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 1 year after results entered into computer system (1998 - present), then destroy	No value at Conversion	Wastepaper

Approvals:

Created **Date:** 1/8/2001
Approved **Transfer User, Records Viewer** **Date:** 1/8/2001

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Series
Authorization No: 885-0012 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: OTPTAT-12 **Record Series Title:** Notice of Hearings
Record Series Description: These are notices sent to individuals when their application is denied or the section intends to consider the suspension or revocation of a license indicating that they are to receive a hearing.
Agency Web Link:

Confidential Description	Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 1 year, then destroy provided no further legal action is pending	No value at Conversion	Wastepaper

Approvals:

Created **Date:** 1/8/2001
Approved **Transfer User, Records Viewer** **Date:** 1/8/2001

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Series Authorization No: 885-0013 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: OTPTAT-13 **Record Series Title:** Renewal Applications
Record Series Description: Application for renewal of license. Included is the supporting documentation that verifies that the requirements for license renewal have been fulfilled.

Agency Web Link: <http://otptat.ohio.gov>

Confidential Description	Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain 2 years after expiration of renewal period, then destroy	No value at Conversion	Shred

Approvals:

Created		Date: 12/19/2011
Approved	Jeffrey Rosa, Records Officer	Date: 12/19/2011
Approved	Michael Hardenbrook, Record Administrator	Date: 12/30/2011
Approved	Martin Meeks, State Auditor	Date: 12/30/2011
Approved	Fred Previts, State Archivist	Date: 12/30/2011

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Series
Authorization No: 885-0014 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: OTPTAT-14 **Record Series Title:** Probation Notice
Record Series Description: Copy of probation order issued by the board. Included with the notice is a list of conditions that must be fulfilled to restore the license to unrestricted practice.

Agency Web Link:

Confidential Description	Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain until license is restored to unrestricted status and no further legal action is pending	No value at Conversion	Wastepaper

Approvals:

Created **Date:** 1/8/2001
Approved **Transfer User, Records Viewer** **Date:** 1/8/2001

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Series
Authorization No: 885-0025 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: PYT-016 **Record Series Title:** BCI Criminal Records Check Reports
Record Series Description: Results of criminal records checks conducted by BCI for initial license applicants.

Agency Web Link:

Confidential Description

Vital Description

These reports contain applicant's social security numbers and the results of any criminal records associated with the applicant. Per Ohio Bureau of Criminal Identification and Investigation, these records are highly confidential and should be shredded once the information needed for licensure purposes is obtained.

Media	Retention Period	Retention Justification	Method of Disposal
Paper	For no records identified, record that records check was received and then immediately dispose of the record. For check with criminal records, contact the appropriate courts to obtain the official documents identified on the report and then immediately dispose of the record.	These reports are highly confidential under state and federal law and the Board is advised to dispose of the record as quickly as possible once the needed information is obtained.	Shred

Approvals:

Created		Date: 3/19/2008
Approved	Jeffrey Rosa, Records Officer	Date: 3/19/2008
Approved	Michael Hardenbrook, Record Administrator	Date: 3/20/2008
Approved	Martin Meeks, State Auditor	Date: 3/24/2008
Approved	Fred Previts, State Archivist	Date: 3/26/2008

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Series
Authorization No: 885-0026 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: PYT-016 **Record Series Title:** FBI Criminal Records Check
Record Series Description: Results of criminal records checks received from the FBI for initial license applicants.
Agency Web Link:

Confidential Description **Vital Description**

These reports contain applicant's social security numbers and the results of any criminal records associated with the applicant. Per Ohio Bureau of Criminal Identification and Investigation, these records are highly confidential and should be shredded once the information needed for licensure purposes is obtained.

Media	Retention Period	Retention Justification	Method of Disposal
Paper	For results with no records identified, dispose of immediately. For results with criminal records identified, collect the relevant information from the appropriate courts and then immediately dispose of the record.	These documents are highly confidential under state and federal law. The Board has been advised to dispose of the records as quickly as possible once the information contained in the report is obtained.	Shred

Approvals:

Created		Date: 3/19/2008
Approved	Jeffrey Rosa, Records Officer	Date: 3/19/2008
Approved	Michael Hardenbrook, Record Administrator	Date: 3/20/2008
Approved	Martin Meeks, State Auditor	Date: 3/24/2008
Approved	Fred Previts, State Archivist	Date: 3/28/2008

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Series Authorization No: 885-0027 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: PYT-015 **Record Series Title:** Board Meeting Minutes

Record Series Description: The official minutes, orders, and decisions of the Ohio Occupational Therapy, Physical Therapy, and Athletic Trainers Board, including the official minutes of each Section of the Board.

Agency Web Link: <http://otptat.ohio.gov>

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	Retain for ten years after meeting date, then transfer to State Archives.	These records document the actions of the Board and have historical and archival value.	Archives

Approvals:

Created		Date: 12/21/2007
Approved	Jeffrey Rosa, Records Officer	Date: 12/21/2007
Approved	Michael Hardenbrook, Record Administrator	Date: 1/3/2008
Approved	Martin Meeks, State Auditor	Date: 1/4/2008
Approved	Fred Previts, State Archivist	Date: 8/6/2008

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Series
Authorization No: 885-0028 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 1

Agency Series No.: PYT-018 **Record Series Title:** Continuing Education Audit Materials
Record Series Description: Information pertaining to the audit of compliance with the continuing education requirements. This may include correspondence, certified mail receipts, CE tracking forms, certificates of completion, etc.
Agency Web Link: <http://otptat.ohio.gov>

Confidential Description	Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Paper	If licensee is not compliant with CE requirement, send to enforcement file; if licensee is compliant, retain until the audit cycle is complete, then destroy.	These records are only needed during the audit process. Once the Board determines that the licensee met the CE requirement, the proof of completion is not required to be maintained.	Shred
Machine Readable	This media applies if the licensee scans and emails the audit information and the staff does not print the attachments. If licensee is not compliant with CE requirement, send to enforcement file; if licensee is compliant, retain until the audit cycle is complete, then delete.	These records are only needed during the audit process. Once the Board determines that the licensee met the CE requirement, the proof of completion is not required to be maintained.	Delete

Approvals:

Created		Date: 12/29/2011
Approved	Jeffrey Rosa, Records Officer	Date: 12/29/2011
Approved	Michael Hardenbrook, Record Administrator	Date: 12/30/2011
Approved	Martin Meeks, State Auditor	Date: 12/30/2011
Approved	Fred Previts, State Archivist	Date: 12/30/2011

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Series Authorization No: 885-0029 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: PYT-019 **Record Series Title:** Audio Recordings of Board Meetings
Record Series Description: Digital audio recordings that are used in the preparation of the minutes of Board meetings.
Agency Web Link:

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Machine Readable	Retain until the meeting minutes are officially adopted and then delete.		Delete

Approvals:

Created		Date: 1/5/2012
Approved	Jeffrey Rosa, Records Officer	Date: 1/5/2012
Approved	Michael Hardenbrook, Record Administrator	Date: 1/19/2012
Approved	Martin Meeks, State Auditor	Date: 1/20/2012
Approved	Fred Previts, State Archivist	Date: 1/27/2012

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Series
Authorization No: 885-0030 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: OTPTAT-20 **Record Series Title:** Social Media

Record Series Description: These web pages are not maintained by the Board, but are instead maintained by a social media web page (e.g.: Facebook, Twitter). the Board may regularly post information on these social media web pages. Records in the series may include, but are not limited to, press releases, photos, events, and general information about the Board. Social media sites will be used as a supplemental, not primary, marketing tool for the Board. Information posted that falls under a separate retention schedule will be kept according to that retention schedule.

Agency Web Link:

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Machine Readable	Retain until updated or no longer of administrative value.		Delete

Approvals:

Created		Date: 12/20/2013
Approved	Jeffrey Rosa, Records Officer	Date: 2/4/2014
Approved	Bunnie Jones, Record Administrator	Date: 2/25/2014
Approved	Martin Meeks, State Auditor	Date: 2/26/2014
Approved	Fred Previts, State Archivist	Date: 3/6/2014

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Series
Authorization No: 885-0031 **Agency:** PYT **Division:** NA **Section:** NA **Revision:** 0

Agency Series No.: OTPTAT-21 **Record Series Title:** Survey Results
Record Series Description: Results of surveys completed electronically through Survey Monkey. Types of surveys include customer satisfaction surveys, surveys seeking input on potential rules changes, etc.
Agency Web Link:

Confidential Description

Vital Description

Media	Retention Period	Retention Justification	Method of Disposal
Machine Readable	Retain until provides no further administrative value.	Staff use Survey Monkey to collect information that will assist the members of the Board in making appropriate decisions regarding the professions regulated by the Board. The raw data collected in the survey is no longer of value once the summary of the information is provided to the Board members.	Delete

Approvals:

Created		Date: 12/20/2013
Approved	Jeffrey Rosa, Records Officer	Date: 2/4/2014
Approved	Bunnie Jones, Record Administrator	Date: 2/25/2014
Approved	Martin Meeks, State Auditor	Date: 2/26/2014
Approved	Fred Previts, State Archivist	Date: 3/6/2014

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