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Workers Compensation Records Retention Schedules

The table below list records retention schedules for the Ohio Attorney General's Office that have been approved by the Department of Administrative Services (DAS), State Archives, and Auditor of State. To view the official agency retention schedules, please go to the Ohio Government Records Database. **Disclaimer:** If you have any issues reading this document, please feel free to Contact Us and we will try to provide an accessible version.

Record Series Title	Agency and Series Authorization Numbers	Record Series Description	Confidential Description	Vital Description	Retention Period	Retention Justification	Method of Disposal	Date Schedule Approved
Litigation Billing Tracking Information	60-OAG-27 10551561	Tracking of invoice information sent to Bureau of Workers Compensation (BWC) client for payment of providing records, independent medical examination (IME), deposition expenses, or attorney fees or costs. Information includes, but is not limited to, date of service, provider, Tax ID, claimants names, claim number, case number, Assistant Attorney General assigned, and date sent to BWC.	May contain an individual's state or federal tax identification number (ORC 149.43 and 149.45).		Electronic – Retain 4 years after invoice sent to client agency.		Electronic – Delete	2/6/2024

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Record Series Title	Agency and Series Authorization Numbers	Record Series Description	Confidential Description	Vital Description	Retention Period	Retention Justification	Method of Disposal	Date Schedule Approved
Case Files	60-OAG-28 10551583	Documents used to litigate case and record events that have occurred in a case. Records include, but are not limited to, cover letter, appeal and complaint, claim packet from the Industrial Commission (IC) or Bureau of Worker's Compensation (BWC), assistant attorney general notes, pleadings, correspondence, court orders, discovery, medical records and release forms, deposition transcripts and videos, summary reports, investigative reports, and employer's records (created and gather by the AGO).	BWC and IC claim files are not open to the public (ORC 4123.88(C)). Limited information may be disclosed to members of the press per ORC 4123.88(D).		Electronic – Retain 4 years after case closed and all appeals exhausted. Paper – Medical records disposed of after final court entry and all appeals exhausted. Retain all other documents for 4 years after case closed and all appeals exhausted. If scanned and saved electronically, dispose of paper immediately.	Medical records release says that records will only be used for the specific litigation that they were released for. It is also rare for the medical records to be needed after the case is completed.	Electronic – Delete Paper – Shred	4/16/2024