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## PROCEDURE 02.01.05

### RECORDS RETENTION AND STORAGE POLICY

#### A. PURPOSE

To establish guidelines for retaining and storing hard copy documents and electronic files generated by the various bureaus in the department during their normal course of business.

#### B. POLICY

The Department of Public Works shall retain records for the period of their immediate or current use, unless longer retention is necessary for historical reference, or to comply with contractual or legal requirements, or for other purposes set forth below. The retention period shall be in accordance with guidelines set forth below.

#### C. DISCUSSION

1. In the performance of its normal business transactions, the department generates a number of hard copy documents in the form of letters, drawings, specifications, charts, reports, and other documents. With the advent of computers and internet technology, much of the departmental business transactions are done through emails and transmittal of digital files.
2. Chapter 8 of the San Francisco Administrative Code requires each department head to maintain records and create a records retention and destruction schedule.
3. The term "records" is defined in Section 8.1 of the Administrative Code. Documents and other materials that do not constitute "records" under that section may be destroyed when no longer needed.
4. Each bureau shall follow the general guidelines established in this procedure. When needed, a bureau may adopt a bureau-specific procedure to better address its unique situation. However the bureau-specific procedure shall be consistent with this departmental procedure.
5. A good system of records retention is important in order to facilitate retrieval of documents. Chapter 67 of the San Francisco Administrative Code, also known as the San Francisco Sunshine Ordinance of 1999, requires departments to provide public information and public records, upon request, in a timely manner. DPW Procedure 02.01.03 describes how to comply with providing documents pursuant to Sunshine Ordinance requests.

#### D. PROCEDURE

##### 1. Categories of Records

a. Category 1 – Permanent Retention – Records that are permanent or essential shall be retained and preserved indefinitely.

- Permanent Records – Permanent records are records required by law to be permanently retained and which are ineligible for destruction unless they are microfilmed or placed in an optical imaging system and special measures are followed. See Administrative Code Section 8.4. Once these measures are followed, the original paper records may be destroyed. Duplicate copies of permanent records may be destroyed whenever they are no longer

necessary for the efficient operation of the Department of Public Works. Examples of permanent records include Annual Reports, Departmental Orders, and certain plans and specifications.

- Essential Records – Essential records are records necessary for the continuity of government and the protection of the rights and interests of individuals. See Administrative Code Section 8.9. Examples of essential records include Operation Bureau’s Director’s letters, certain plans and certain permits.
- b. Category 2 – Current Records – These are records which for convenience, ready reference or other reasons are retained in the office space and equipment of the department. Current records shall be retained as follows:
- Where retention period is specified by law. Where federal, state, or local law prescribes a definite period of time for retaining certain records, the department will retain the records for the period specified by law. Examples are debris box permits, employee’s Statements of Economic Interest Form 700 (seven years pursuant to Government Code Section 81009(e)), and Accident Injury Reports (five years pursuant to CFR 1404.6).
  - Where no retention period is specified by law. Where no specific retention period is specified by law, the retention period for records that the department is required to retain shall be as specified in the Attachment – Record Retention Schedule. Records shall be retained for a minimum of two years, although such records may be treated as “storage records” and placed in storage at any time during the applicable retention period. Examples include inventories, budgets, estimates, and work orders.
- c. Category 3 – Storage Records – Storage records are records that are retained offsite. Storage records are subject to the same retention requirements as current records. Examples include calendars, permits, and project files.
- d. Category 4 – No Retention Required – Documents and other materials that are not “records” as defined by Administrative Code Section 8.1 need not be retained unless retention is otherwise required by local law or by the attached Record Retention Schedule. These documents and other materials (including originals and duplicates) that are not necessary to the functioning or continuity of the department and which have no legal significance may be destroyed when no longer needed. Examples include materials and documents generated for the convenience of the person generating them, draft documents (other than some contracts) which have been superseded by subsequent versions or rendered moot by departmental action, and duplicate copies of records that are no longer needed. Specific examples include telephone message slips, miscellaneous correspondence not requiring follow-up or departmental action, notepads, emails that do not contain information required to be retained under this policy and chronological files. For these documents, it is up to the originator or recipient to determine when the document’s business utility has ended.
2. Records Not Addressed in the Record Retention Schedule
- Records and other documents or materials that are not expressly addressed by the attached Record Retention Schedule may be destroyed at any time provided that they have been retained for the periods prescribed for substantially similar records.
3. Storage of Records

Records may be stored in the department's office space or equipment if the records are in active use or are maintained in the office for convenience or ready reference. Examples of active files appropriately maintained in departmental office space or equipment include active chronological files, research and reference files, legislative drafting files, pending complaint files, administrative files, personnel files, and calendars. Inactive records, for which use or reference has diminished sufficiently to permit removal from departmental office space or equipment, may be sent to an off-site storage facility. The off-site storage facility may be a City-owned facility or a leased facility.

4. Historical Records

Historical records are those which are no longer of use to the department but which, because of their age or research value, may be of historical interest or significance. Historical records may not be destroyed except in accordance with the procedures set forth in Administrative Code Section 8.7.

5. Pending Claims and Litigation

The retention periods set forth in the attached record retention schedule shall not apply to materials that are otherwise eligible for destruction, but which may be relevant to the pending claim or litigation against the City.

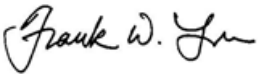
Once the department becomes aware of the existence of a claim or litigation against the department, the department should retain all documents and other materials related to the claim or litigation until such time as the claim or litigation has been resolved. When the department has reason to believe that one or more other departments also have records relating to the claim or litigation, those departments shall also be notified of the need to retain those documents.

6. Electronic and digital data

All electronic or digital data must adhere to the retention period as specified in this Chapter.


The department, as an option, could also convert paper information into electronic or digital data, unless such conversion is prohibited by law.

**RECOMMENDED:**

X 

Frank W. Lee  
Executive Assistant to the Director

**APPROVED:**

X 

Mohammed Nuru  
Director of Public Works

**Prepared by:** Nelson Wong, Bureau of Engineering

**Revised/Reviewed by:** Frank Lee, Executive Assistant to the Director

**APWA Practice No.:** 5.6 and 6.9 (7th Edition)

**NOTE:**

THIS PROCEDURE SUPERSEDES

PROCEDURE NO. 2.1.5, REV. 0



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## RECORD RETENTION SCHEDULE

**Department Name:** Public Works

**Department Contact:** Frank Lee

**Contact Phone Number:** (415) 554-6993

**Date:** January 2014

Division	A. <u>Record Category</u>	TYPE OF RECORD	RETENTION CATEGORY	RETENTION PERIOD			REMARKS
				Total	On Site	Off Site	
Director's Office: Admin/Public Affairs/News Rack Program	Financial	Accounting Documents; Purchase Orders, etc.	2	Destroyed after 4th year	4 years	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Reports/Records	Annual Reports	2	Permanent	Permanent	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Meeting Records	Audio Tapes of Meetings	2	Erased after 2nd year	2 years	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Administration	Calendar (Director's)	2	After 2nd year.	2 years	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Reports/Records	Departmental Digest/Orders	2	Permanent	Permanent	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Administration	Emails	2	When no longer needed unless they contain info required to be maintained.	N/A	N/A	Departmental Policy

Director's Office: Admin/Public Affairs/News Rack Program	Administration	Forms	2	Until superceded or no longer in use.	Until superceded or no longer in use	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Administration	General Correspondence: Letters, Memos, etc.	2	Destroyed after 4th year	4 years	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Meeting Records	Meeting Agendas, Minutes	2	Destroyed after 4th year	4 years	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Administration	Miscellaneous: Brochures, Newsletters, Catalogues, Magazines	2	Until superceded	Until superceded	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Permits	News Rack Certificates	2	Permanent	Permanent	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Reports/Records	News Rack Violation Log	2	Permanent	Permanent	N/A	Departmental Policy
Director's Office: Admin/Public Affairs/News Rack Program	Administration	Telephone Messages, Notes	2	When no longer needed	N/A	N/A	Departmental Policy
Director's Office: Claims	Reports/Records	Claims Files	2	Destroyed after 7 years from accident date	7 years	N/A	Departmental Policy
Director's Office: Claims	Rules & Regulations	Code Books & Permanent Library	2	Permanent	Permanent	N/A	Departmental Policy

Director's Office: Claims	Claims	Possible Claim Files	2	Destroyed after 5 years	1 year	4 years	Departmental Policy
Director's Office: Claims	Claims	Subject Files for City Attorney	2	Permanent	Permanent	N/A	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Certified Accounting Docs: Grant	2	After 5 yearsDestr oy	Until final audit	5 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Certified Accounting Docs: Nongrant annual	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Certified Accounting Docs: Nongrant continuing	2	After 5 yearsDestr oy	3 years after project completion	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Project Files: Grant	2	After 5yearsDes troy	Until final audit	5 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Project Files: NonGrant	2	After 5 yearsDestr oy	3 years after project completion	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Job Orders	2	After 5 yearsDestr oy	3 years after J.O. is closed	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	FAMIS Reports	2	After 6 yearsDestr oy	3 years	3 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	FPS Reports	2	After 6 yearsDestr oy	3 years	3 years	Departmental Policy



Financial Management & Admin.: Accounting	Agreements	AsNeeded Master Agreements	2	After 5 yearsDestr oy	3 years after expiration date	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Receipts Processing Forms	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Revolving Fund Cancelled Checks	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Work Orders	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Delivery Orders	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Foreman's Requisitions	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Asphalt Plant Production Costs	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Personnel	Accident Reports	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Equipment	Reports Of Damage To City Property	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Equipment	Store Withdrawal Tags	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy

Financial Management & Admin.: Accounting	Equipment	Gas, Oil Repts/Auto Equip Repair Repts	2	After 5 yearsDestr oy	3 years	2 years	Departmental Policy
Financial Management & Admin.: Accounting	Financial	Account Receivable	2	Retain 1 year after scanning	Continuous	2 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	Contract Specification	2	After NTP (Construct ion Managem ent IDC/BDC Contract Prep Maintains Archives)	Up to NTP	At Least 20 Years (Construct ion Managem ent IDC/BDC Contract Prep Maintains Archives)	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	Contract Plans	2	After NTP (Construct ion Managem ent IDC/BDC Contract Prep Maintains Archives)	Up to NTP	At Least 20 Years (Construct ion Managem ent IDC/BDC Contract Prep Maintains Archives)	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	Standard Specification	2	Until Supersede d	Until Superseded	Store 20 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	General Provisions	2	Until Supersede d	Until Superseded	Store 20 years	Departmental Policy

Financial Management & Admin.: Contract Admin.	Contracts	Contract Folders(Construction)	2	5 years	Up to final acceptance	5 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	Contract Folders(Professional Services)	2	5 years	Up to final acceptance	5 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Reports	Weekly Reports	2	2 years, 3 months	3 months	2 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Reports	Quarterly MBE Reports	2	4 years	2 years	2 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Reports	Annual Reports	2	6 years	1 year	5 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Administration	General Correspondence File	2	7 years	2 years	5 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	Contract Insurance Manual	2	Until Superseded	Until Superseded	N/A	Departmental Policy
Financial Management & Admin.: Contract Admin.	Administration	HRC M/WBE Directory	2	Until Superseded (Now available on HRC website.	Until Superseded (Now available on HRC website.	N/A	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	Unsuccessful Bids	2	2 Years after Bid	Until Award	2 Years after Bid	Departmental Policy
Financial Management & Admin.: Contract Admin.	Administration	Delivery Shipping Lists	2	10 years (Included in	5 years (Included in Contract Files)	5 years (Included in	Departmental Policy

				Contract Files)		Contract Files)	
Financial Management & Admin.: Contract Admin.	Financial	Cash Receipts	2	2 years, 6 months	6 months	2 years	Departmental Policy
Financial Management & Admin.: Contract Admin.	Contracts	AsNeeded Contract Files	2	5 years.	Up to Notice of Agreement	5 years	Departmental Policy
Financial Management & Admin.: Environmental Health & Safety	Personnel	OSHA 200/300 Log and supporting documentation	2	Destroy after 5th year	5 years	N/A	Departmental Policy
Financial Management & Admin.: Environmental Health & Safety	Personnel	Industrial Hygiene Reports and Lab Results	2	Destroy after 75th year	5+ years	70 years	Departmental Policy
Financial Management & Admin.: Environmental Health & Safety	Personnel	Health Education: Attendance Sheets and Curriculums	2	Destroy after 3rd year	3 years	N/A	Departmental Policy
Financial Management & Admin.: Environmental Health & Safety	Personnel	DMV Pin pull Reports	2	Destroy after 6 months	6 months	N/A	Departmental Policy
Financial Management & Admin.: Environmental Health & Safety	Personnel	Suspended License Reports	2	Destroy after 6 months	6 months	N/A	Departmental Policy
Financial Management & Admin.: Finance & Budget	Financial	Indirect Cost Plans	1	Indefinitely	Indefinitely – store electronically		Departmental Policy – same as Controller’s Cowcap Retention
Financial Management & Admin.: Finance & Budget	Budget	Indirect Cost Plan Supporting Documents - Caltrans Audited	2	5 years	5 years		Departmental Policy – same as Controller’s Cowcap Supporting Document Retention

Financial Management & Admin.: Finance & Budget	Budget	Indirect Cost Plan Supporting Documents - unaudited	1	Indefinitely	10 years	Indefinitely	Departmental Policy
Financial Management & Admin.: Finance & Budget	Budget	Overhead Rate Adjustments - Supporting Documents	1	Indefinitely	10 years	Indefinitely	Departmental Policy
Financial Management & Admin.: Finance & Budget	Budget	Final Approved Budgets – Turnaround Reports	1	Indefinitely	Indefinitely – store electronically		Departmental Policy
Financial Management & Admin.: Finance & Budget	Budget	Department Budget Submission Documents – Line Items, Spreadsheets and Org Charts	2	10 years	10 years		Departmental Policy – Controller’s Dept. Budget Submission Documents Retention plus 5 yrs
Financial Management & Admin.: Finance & Budget	Budget	Department Budget Backup Support	2	2 years	2 years		Departmental Policy – Controller’s Budget Documents/ Work Papers Retention
Financial Management & Admin.: Finance & Budget	Financial	Supplemental Appropriation Request	1	Keep indefinitely.	5 years	Indefinitely	Departmental Policy

Financial Management & Admin.: Personnel	Personnel	Employee Personnel Folders	2	5 years after final separation if there is no litigation or review by regulatory agency pending	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Employee information	2	"" ""	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Performance & training docs.	2	"" ""	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	General employment history records	2	"" ""	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Records of corrective action	2	"" ""	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Payroll records	2	"" ""	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Administration	Administration Files	2	Destroyed after 5 years if there is no litigation or review by regulatory agency pending	5 years	N/A	Departmental Policy

Financial Management & Admin.: Personnel	Personnel	Discrimination & harassment complaints, investigations & resolutions	2	""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Grievances	2	""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Background investigation reports, results of polygraph exams	2	""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Criminal records	2	""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Medical records	2	""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Recruitment files, including applications & resumes	2	""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Conflict of interest statements	2	Destroyed after 7 years if there is no litigation or review by regulatory agency pending	7 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Unfair labor practice complaints or contract disputes	2	Destroyed after 5 years if there is no	5 years	N/A	Departmental Policy

				litigation or review by regulatory agency pending			
Financial Management & Admin.: Personnel	Personnel	Sealed documents	2	"" ""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Worker's compensation records	2	"" ""	5 years	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Employment History	2	N/A	Until separated	Permanent	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	PARS	2	15 months after separation date	Until separated	15 months	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	OEPF Transmittal Receipts	2	Destroyed w/employee's personnel file	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Ins Form I9 File	2	3 years or 1 year after the separation whichever is longer	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Oath Of Allegiance	2	5 years after final separation if no	Until separated	5 years	Departmental Policy



				litigation or review by regulatory agency pending			
Financial Management & Admin.: Personnel	Personnel	Driver License Survey	2	Destroyed w/employee personnel file	Until separated	5 years	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Job Folders	2	N/A	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Job Announcements	2	N/A	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Eligible Lists	2	N/A	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Notices of Certifications	2	N/A	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	CSC Copies	2	N/A	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Bureau Copies	2	N/A	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Class Specifications	2	Until superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Personnel Requisitions	2	Until canceled or expired	Until canceled/expired	N/A	Departmental Policy

Financial Management & Admin.: Personnel	Personnel	Rules, Policies & Procedures	2	Until superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	CSC Rules	2	Until superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Personnel Policies & Procedures	2	Until superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Payroll/Personnel Procedures Manual	2	Until superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Personnel	Department Policy Book	2	Until superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Reports	Reports	2	When no longer needed	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Reports	CSC Weekly Report	2	When no longer needed	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Reports	CSC Seniority Roster	2	When no longer needed	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Reports	FPS BiWeekly Reports	2	When no longer needed	N/A	N/A	Departmental Policy

Financial Management & Admin.: Personnel	Administration	Forms	2	Until superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Administration	Brochures	2	When superceded	Until superceded	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Administration	Duplicates of memo, letter, computer printout & etc.	2	When no longer needed	N/A	N/A	Departmental Policy
Financial Management & Admin.: Personnel	Administration	Phone messages & slips	2	When no longer needed	N/A	N/A	Departmental Policy
Buildings Design & Construction Division (BDC)	Project Management	Project Funding; Grants, Appropriations, Budgets	2	10 years after project close-out	After project close-out	10 years after project close-out	FEMA/State & Federal grant funded projects must be retained min 3 yrs after final audit
Buildings Design & Construction Division (BDC)	Project Management	Project Schedules & Status Reports	2	10 years after project close-out	1 year or after project close-out	10 years after project close-out	"" ""
Buildings Design & Construction Division (BDC)	Project Management	Consultant & Contractor Selection Process; RFQ's/Bids	2	10 years after project close-out	1 year or after project close-out	10 years after project close-out	"" ""
Buildings Design & Construction Division (BDC)	Project Management	Consultant Contract Management	2	10 years after project close-out	After project close-out	10 years after project close-out	"" ""
Buildings Design & Construction Division (BDC)	Architectural Services	General Programming & Planning	2	Offer drawing of value to Public	After Project close-out	10 years after	"" ""

				Library before destroying		project close-out	
Buildings Design & Construction Division (BDC)	Architectural Services	General Design	2	Offer drawing of value to Public Library before destroying	After Project close-out	10 years after project close-out	"" ""
Buildings Design & Construction Division (BDC)	Architectural Services	Construction Drawings, Specifications	2	Offer to Public Library History Room before destroying	1 year or after project close-out	Until building or project area is demolished	Departmental Policy
Buildings Design & Construction Division (BDC)	Architectural Services	Addenda, Change Orders, As-built Drawings	2	Offer to Public Library History Room before destroying	1 year or after project close-out	Until building or project area is demolished	Departmental Policy
Buildings Design & Construction Division (BDC)	Architectural Services	Permits and Approvals	2	10 years after project close-out	After project close-out	10 years after project close-out	FEMA/State & Federal grant funded projects must be retained min 3 yrs after final audit
Buildings Design & Construction Division (BDC)	Construction Management	Construction ContractorContract Management	2	10 years after project close-out	1 year or after project close-out	10 years after project close-out	"" ""

Buildings Design & Construction Division (BDC)	Construction Management	Modification and Payments	2	10 years after project close-out	1 year or after project close-out	10 years after project close-out	"" ""
Buildings Design & Construction Division (BDC)	Construction Management	Inspection and Testing Reports	2	10 years after project close-out	1 year or after project close-out	10 years after project close-out	"" ""
Buildings Design & Construction Division (BDC)	Construction Management	Close-out Documents/Warranties	2	10 years after project close-out	1 year or after project close-out	10 years after project close-out	"" ""
Buildings Design & Construction Division (BDC)	Facilities Management	Facility Inventory and Facility Condition Reports	2	Until superseded	Until Superseded	N/A	Departmental Policy
Buildings Design & Construction Division (BDC)	Facilities Management	Capital Improvement Program requests and appropriations	2	Permanent	5 years	Microfilm for Inactive Storage	Departmental Policy
Buildings Design & Construction Division (BDC)	Facilities Management	Facility Planning Reports, Master Plans, Bond Program Proposals	2	Offer to Public Library History Room prior to destroying	5 years or, if actively underway, after implementation is completed	20 years	Departmental Policy
Buildings Design & Construction Division (BDC)	Budget	Annual Bureau Budget	2	Destroy after 7 years	2 years	5 years	Departmental Policy

Buildings Design & Construction Division (BDC)	Administration	BDC Integrated Project Database	2	Permanent	5 years after each project close-out	Electronically archive for Inactive Storage	Departmental Policy
Buildings Design & Construction Division (BDC)	Administration	Forecasts; Advertising Schedule, Workload and Staffing Forecast	2	Electronically archive for Inactive Storage	2 years	5 years	Departmental Policy
Buildings Design & Construction Division (BDC)	Administration	Annual, Quarterly, Monthly Status and Performance Reports	2	Destroy after 7 years	2 years	5 years	Departmental Policy
Buildings Design & Construction Division (BDC)	Administration	Senior Staff Meeting Notes	2	Destroy after 7 years	2 years	5 years	Departmental Policy
Buildings Design & Construction Division (BDC)	Administration	Policies & Procedures	2	Destroy after 1 year after superseded	Until Superseded	1 year after superseded	Departmental Policy
Buildings Design & Construction Division (BDC)	Administration	General Bureau Correspondence	2	Destroy after 7 years	2 years	5 years	Departmental Policy
Buildings Design & Construction Division (BDC)	Administration	Architectural Product Literature	2	Until Superseded	Until Superseded	N/A	Individual project files are to contain the relevant product

							literature for the project for archive purposes
Buildings Design & Construction Division (BDC)	Administration	Build Codes and Regulations	2	Verify BBI retains a copy before destroying .	Until Superseded	10 years after superseded , 1 copy	Departmental Policy
Construction Management (BDC/IDC)	Contracts	As-Built Plans and Warranties	2	Permanent Record	1 year after project close-out	Permanent Record	Departmental Policy
Construction Management (BDC/IDC)	Contracts	Change Orders, Addenda, etc.	2	Destroy after 10th year	1 year after project close-out	10 years	Departmental Policy
Construction Management (BDC/IDC)	Administration	Computer Disks	2	Retain a copy	1 year after project close-out	5 years	Departmental Policy
Construction Management (BDC/IDC)	Contracts	Cost Estimating Books and Updates	2	Until superseded	Until Superseded	N/A	Departmental Policy
Construction Management (BDC/IDC)	Equipment	Facility, Furniture & Vehicle Inventory	2	Until superseded	Until Superseded	N/A	Departmental Policy
Construction Management (BDC/IDC)	Administration	Field Notes and Survey Records	2	Permanent Record	1 year after project close-out	Permanent Record	Departmental Policy

Construction Management (BDC/IDC)	Financial	Financing Documents (Payment Records)	2	Destroy after 10th year	1 year after project close-out	10 years	Departmental Policy
Construction Management (BDC/IDC)	Administration	Memos/Correspondence/Inspections/ Testing Reports	2	After 2 years	1 year after project close-out	2 years	Departmental Policy
Construction Management (BDC/IDC)	Contracts	Plans	2	Permanent Record	1 year after project close-out	Permanent Record	Departmental Policy
Construction Management (BDC/IDC)	Administration	Product Literature and Catalogs	2	Until superseded	Until Superseded	N/A	Departmental Policy
Construction Management (BDC/IDC)	Contracts	Project File	2	Destroy after 10th year	1 year after project close-out	10 years	Departmental Policy
Construction Management (BDC/IDC)	Contracts	Shop Drawings, Approvals, Permits	2	Destroy after 10th year	1 year after project close-out	10 years	Departmental Policy
Construction Management (BDC/IDC)	Contracts	Specifications	2	After Microfilming	1 year after project close-out	10 years	Departmental Policy
Construction Management (BDC/IDC)	Surveys and Mapping	Survey and Other Maps	2	Permanent Record	1 year after project close-out	Permanent Record	Departmental Policy
Construction Management (BDC/IDC)	Personnel	Training Records	2	Until superseded	Until Superseded	N/A	Departmental Policy
Infrastructure Design & Construction Division (IDC)	Administration	Procedures: Manual of IDC Procedures	2	Until Superseded	Until Superseded		Departmental Policy



Infrastructure Design & Construction Division (IDC)	Administration	Policies & Directives: City, DPW, IDC, Division, Section Policies & Directives	2	Until Superseded	Until Superseded		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Administration	Organization: Organization Charts	2	Until Superseded	Until Superseded		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Budget	Annual Budget: Requested & Approved Budgets	2	3 years	3 years		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Administration	Capital Improvements: Requested and approved gas tax and general fund CIP project lists and data sheets	2	5 years	5 years		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Personnel	Personnel: Memos and requests for personnel actions	2	2 years	2 years		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Personnel	Training: Training programs, requests, etc.	2	2 years	2 years		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Administration	Incoming Correspondence: All correspondence received by Section and filed in chronological order	2	2 years	2 years		Departmental Policy

Infrastructure Design & Construction Division (IDC)	Administration	Outgoing Correspondence: All correspondence originated in Section and filed in chronological order	2	2 years	2 years		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Administration	Suspense (Tickler): Copies of all correspondence requiring actions by Sections, or where action is requested by Section	2	Discarded when action is complete	Discarded when action is complete		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Administration	Others As Needed: Use additional file numbers for any other administrative files needed by Section	2	Section's discretion	Section's discretion		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Administration	Contract Plan Index: Master index catalog of files electronically archived for the Bureau	2	Permanen t	Permanent		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Projects	Milestone: Milestone Reports; other data related to milestone	2	Until supersede d by most current report	Until superseded by most current report		Departmental Policy

Infrastructure Design & Construction Division (IDC)	Projects	Cost Control Reports: IDC Project Cost Control Reports and related data	2	Until superseded by most current report	Until superseded by most current report		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Projects	Job Order File: Project file for each job order, including job order and modifications, correspondence, MOU, etc.	2	Transfer to inactive when JO closed. Discard five years after JO closed	Transfer to inactive when JO closed.		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Projects	Personal Service Contracts: RFP; Agreement; Appointment; progress payments; modifications, etc.	2	20 years after termination of contract.	Five years after termination of contract.		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Central Archives	Contract Plans: Tracings; As-Build drawings.	2	Permanent	Permanent		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Central Archives	Contract Documents: Specifications; Special provisions; Addenda.	2	Permanent	Permanent		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Central Archives	Standards: Standard Plans.	2	Permanent	Permanent		Departmental Policy

Infrastructure Design & Construction Division (IDC)	Infrastructure	Road Structures: Bridges, tunnels, retaining walls, stairways, and other City owned road structures.	2	Permanent	Permanent		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Infrastructure	AWSS: AWSS pipes; cisterns; etc.	2	Permanent	Permanent		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Infrastructure	Soil: Soil reports; boring records, subsidence; slope protection.	2	Permanent	Permanent		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Infrastructure	City Trees: Tree management; tree inventory; other related documents and records.	2	Permanent	Permanent		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Technical References	Structural: Structural studies, analyses, design calculations.	2	Discard when no longer useful for reference	Discard when no longer useful for reference		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Technical References	Electrical: Electrical engineering studies, analyses, design calculations.	2	Discard when no longer useful for reference	Discard when no longer useful for reference		Departmental Policy
Infrastructure Design & Construction Division (IDC)	Technical References	Mechanical: Mechanical engineering studies, analyses,	2	Discard when no longer	Discard when no longer		Departmental Policy

		design calculations.		useful for reference	useful for reference		
Bureau of Street-Use & Mapping	Permits	Transit Shelter Permits	2	Retain one copy at BSM's office	Until contract ends	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Payphone Permits	2	Retain one copy at BSM's office	Until superceded	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Additional Street Space	1	5 years after expiration	Until expired	5 years	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Newsracks	1	Once scanned, destroy	Indefinitely	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Noise	3	2 years after expiration	Until expired	2 years	Departmental Policy
Bureau of Street-Use & Mapping	Codes & Regulations	Public Works Code	1	Retain copy in Bureau Library	Until superceded	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Codes & Regulations	Public Works Orders/Regulations	1	Retain copy in Bureau	Until superceded	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Agreements	Memorandum of Understanding	1	Retain copy in Bureau	Until superceded	N/A	Departmental Policy

Bureau of Street-Use & Mapping	Permits	Utility Excavation Permits	3	10 years after issuance	2 years	8 years	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Encroachment Permits	1	Retain recorded permits and approved plans in street files	Indefinitely	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Street Excavation Permits	3	5 years after issuance	3 years	2 years	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Street Improvement Permits	1	Retain recorded permits and approved plans in street files	Indefinitely	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Temporary Occupancy Permits	3	5 years after issuance	As long as use is active	2 years	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Tank Abandonment, Install/Removal	1	Retain recorded permit	Indefinite	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Inspections	Inspection Reports	2	5 years	Until completed	5 years	Departmental Policy

Bureau of Street-Use & Mapping	Citations	Notice of Violation	3	3 years after abated	Until abated	3 years	Departmental Policy
Bureau of Street-Use & Mapping	Citations	Warning of Violation	3	3 years after issuance	1 year	2 years	Departmental Policy
Bureau of Street-Use & Mapping	Contracts	Sidewalk Abatement Contract	3	1 year after completed (Original contract documents kept by DPW Contract Admin)	Until completed	1 year	Departmental Policy
Bureau of Street-Use & Mapping	Liens	Intent to Lien	3	1 year after recorded	Until abated	1 year	Departmental Policy
Bureau of Street-Use & Mapping	Liens	Release of Lien	2	2 years after recorded	Until abated	1 year	Departmental Policy
Bureau of Street-Use & Mapping	Liens	Lien-Ordinance	3	1 year after recorded	Until abated	1 year	Departmental Policy
Bureau of Street-Use & Mapping	Mapping	Maps Records	1	50% can be electronically stored and paper maps can be stored off site.	Indefinitely	N/A	Departmental Policy

Bureau of Street-Use & Mapping	Subdivisions	Subdivision Application Files	1	Consult attorney for disposition	Indefinitely		Departmental Policy
Bureau of Street-Use & Mapping	Undergrounding	Underground Petitions(no assessment) Rule 20A	2	Completion of Construction	Completion of Construction	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Assessments	Assessment Petitions	2	Approximately 5 years following construction	Completion of Assessment	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Undergrounding	Underground Legislation	1	Retain one copy	Retain one copy	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Assessment	Assessment Legislation	1	Retain one copy	Retain one copy	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Reports	Engineer's Report	2	Approx. 5 years following construction	Completion of Assessment	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Budget	Bureau Annual Budget	2	Until superseded	1 year	N/A	Departmental Policy



Bureau of Street-Use & Mapping	Administration	Policies & Procedures	2	Until superseded	Until Superseded	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Financial	Purchase Orders, Payment Requests, etc.	2	1 year	1 year	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Financial	Financial Documents	2	Copies from Controller	1 years	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Administration	General Correspondence	2	1 year	1 years	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Administration	Complaint Related Correspondence	3	To be filed in Complaint file	2 years	3 years	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Permit Related Correspondence	3	To be filed in Permit file	See specific type of permit	See specific type of permit	Departmental Policy
Bureau of Street-Use & Mapping	Administration	Mapping Action Related Correspondence	3	To be filed in Mapping Action file	See specific type of mapping action	See specific type of mapping action	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Automatic Public Toilet Permit	1	Retain one copy at BSM	Until contract ends	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Public Service Kiosk Permit	1	Retain one copy at BSM	Until contract ends	N/A	Departmental Policy
Bureau of Street-Use & Mapping	Permits	Debris Box Permits	2	1 year	1 year	1 year	Departmental Policy

Bureau of Street-Use & Mapping	Meeting Records	CULCOP Minutes & Agenda	2	Destroy after 2nd year	2 yrs		Departmental Policy
Bureau of Street-Use & Mapping	Meeting Records	SCCC General Meeting Minutes/Agenda	2	Destroy after 2nd year	2 yrs		Departmental Policy
Bureau of Street-Use & Mapping	Reports	Utility Excavation Five Year Plans	2	Destroy after 2nd year	2 yrs		Departmental Policy
Bureau of Street-Use & Mapping	Administration	NOI/LOT	2	Destroy after 2nd year	2 yrs		Departmental Policy
Bureau of Street-Use & Mapping	Permits	Utility Condition Permits	2	Destroy after 2nd year	2 yrs		Departmental Policy
Bureau of Street-Use & Mapping	Reports	Division Quarterly and Annual Reports	2	Destroy after 2nd year	2 yrs		Departmental Policy
Bureau of Building Repair	Personnel	Personnel Records	1	All official personnel records kept at 1155 Market	Permanent		Departmental Policy
Bureau of Building Repair	Personnel	Requisitions, Justifications	1	Copies available from Personnel.	Permanent		Departmental Policy
Bureau of Building Repair	Personnel	Certifications, Temp Exempt Lists	2	Until superseded or expired.	1 year		Departmental Policy

Bureau of Building Repair	Personnel	OSHA Logs	2	5 years	5 years		Departmental Policy
Bureau of Building Repair	Personnel	Safety Records	2	3 years	3 years		Departmental Policy
Bureau of Building Repair	ID Work Activity	Estimates	2	5 years	5 years		Departmental Policy
Bureau of Building Repair	ID Work Activity	Service Requests	2	2 years	2 years		Departmental Policy
Bureau of Building Repair	ID Work Activity	Work Orders	2	5 years	5 years		Departmental Policy
Bureau of Building Repair	ID Work Activity	Emergency Call-In Log	2	2 years	2 years		Departmental Policy
Bureau of Building Repair	Equipment	Equipment Sign-out Sheets	2	1 year	1 year		Departmental Policy
Bureau of Building Repair	Purchasing	Purchase Orders, Contracts, Blanket PO's, Requisitions.	2	Copies available from the Controller.	1 year		Departmental Policy
Bureau of Building Repair	Purchasing	Directives	1	Until superseded.	Permanent		Departmental Policy
Bureau of Building Repair	Purchasing	Instructions	1	Until superseded.	Permanent		Departmental Policy
Bureau of Building Repair	Budget	Baseline	2	5 years	5 years		Departmental Policy
Bureau of Building Repair	Budget	Instructions	2	Until superseded.	1 year		Departmental Policy
Bureau of Building Repair	Budget	Completed Budgets	2	Copies available.	5 years		Departmental Policy

Bureau of Building Repair	Correspondence	General	2	5 years	2 years	3 years	Departmental Policy
Bureau of Building Repair	Correspondence	Director's Numbered Letters	1	Permanent	Permanent		Departmental Policy
Bureau of Building Repair	Correspondence	Legal (lawsuits, etc.)	1	Permanent	Permanent		Departmental Policy
Bureau of Building Repair	Correspondence	Directives	1	Until superseded	Permanent		Departmental Policy
Bureau of Building Repair	Correspondence	Instructions	2	Until not applicable			Departmental Policy
Bureau of Building Repair	Timeroll Hardcopy	Work Report	2	6 years	2 years	4 years	Departmental Policy
Bureau of Building Repair	Timeroll Hardcopy	Monthly Time roll Amendments	2	6 years	2 years	4 years	Departmental Policy
Bureau of Building Repair	Timeroll Hardcopy	Daily Overtime Report	2	6 years	2 years	4 years	Departmental Policy
Bureau of Street & Sewer Repair	Personnel	Personnel Records	1	All official personnel records kept at 1155 Market	Permanent		Departmental Policy
Bureau of Street & Sewer Repair	Personnel	Requisitions, Justifications	1	Copies available from Personnel.	Permanent		Departmental Policy
Bureau of Street & Sewer Repair	Personnel	Certifications, Temp Exempt Lists	2	Until superseded or expired.	1 year		Departmental Policy

Bureau of Street & Sewer Repair	Personnel	OSHA Logs	2	5 years	5 years		Departmental Policy
Bureau of Street & Sewer Repair	Personnel	Safety Records	2	3 years	3 years		Departmental Policy
Bureau of Street & Sewer Repair	ID Work Activity	Estimates	2	5 years	5 years		Departmental Policy
Bureau of Street & Sewer Repair	ID Work Activity	Service Requests	2	2 years	2 years		Departmental Policy
Bureau of Street & Sewer Repair	ID Work Activity	Work Orders	2	5 years	5 years		Departmental Policy
Bureau of Street & Sewer Repair	ID Work Activity	Emergency Call-In Log	2	2 years	2 years		Departmental Policy
Bureau of Street & Sewer Repair	Equipment	Equipment Sign-Out Sheets	2	1 year	1 year		Departmental Policy
Bureau of Street & Sewer Repair	Purchasing	Purchase Orders, Contracts, Blanket PO's, Requisitions.	2	Copies available from the Controller.	1 year		Departmental Policy
Bureau of Street & Sewer Repair	Purchasing	Directives	1	Until superseded.	Permanent		Departmental Policy
Bureau of Street & Sewer Repair	Purchasing	Instructions	1	Until superseded.	Permanent		Departmental Policy
Bureau of Street & Sewer Repair	Budget	Baseline	2	5 years	5 years		Departmental Policy
Bureau of Street & Sewer Repair	Budget	Instructions	2	Until superseded.	1 year		Departmental Policy
Bureau of Street & Sewer Repair	Budget	Completed Budgets	2	Copies available.	5 years		Departmental Policy
Bureau of Street & Sewer Repair	Correspondence	General	2	5 years	2 years	3 years	Departmental Policy

Bureau of Street & Sewer Repair	Correspondence	Director's Numbered Letters	1	Permanent	Permanent		Departmental Policy
Bureau of Street & Sewer Repair	Correspondence	Legal (lawsuits, etc.)	1	Permanent	Permanent		Departmental Policy
Bureau of Street & Sewer Repair	Correspondence	Directives	1	Until superseded	Permanent		Departmental Policy
Bureau of Street & Sewer Repair	Correspondence	Instructions	2	Until not applicable			Departmental Policy
Bureau of Street & Sewer Repair	Timeroll Hardcopy	Work Report	2	6 years	2 years	4 years	Departmental Policy
Bureau of Street & Sewer Repair	Timeroll Hardcopy	Monthly Time roll Amendments	2	6 years	2 years	4 years	Departmental Policy
Bureau of Street & Sewer Repair	Timeroll Hardcopy	Daily Overtime Report	2	6 years	2 years	4 years	Departmental Policy
Bureau of Street Environmental Services	Reports	Cities and Warnings	2	After 5th year	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services	Reports	Billings	3	After 5th year	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services	Reports	Litter Receptacles	3	After 5th year	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services	Reports	Political Signs	3	After 5th year. May be kept longer if payment is pending	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services	Correspondence	General	3	After 5th year	2 years	3 years	Departmental Policy

Bureau of Street Environmental Services	Correspondence	Legal Action (lawsuits, etc.)	3	After 5th year. Storage time may be extended due to Court action.	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services	Correspondence	Directives/Instructions	2	Until superceded or no longer applicable.	-	-	Departmental Policy
Bureau of Street Environmental Services	Timeroll Hardcopy	Supervisor's Daily Sheets	3	After 5th year	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services	Timeroll Hardcopy	Weekly Timesheet reports	3	After 5th year	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services	Timeroll Hardcopy	Time roll Amendments	3	After 5th year	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services	Timeroll Hardcopy	Daily Timesheets, Overtime Sheets, Time-off Requests	3	After 5th year	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services	Timeroll Hardcopy	Laborer/Truck Driver Sign-In Sheets	3	After 5th year	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services	Codes & Ordinances	Street Cleaning	2	Until superceded or no longer applicable	-	-	Departmental Policy

Bureau of Street Environmental Services	Purchasing	PO's, Requisitions, TPAs, Contracts, etc.	3	After 2nd year	2 years	-	Departmental Policy
Bureau of Street Environmental Services	Purchasing	Directives, Instructions	2	Until superceded or no longer applicable	-	-	Departmental Policy
Bureau of Street Environmental Services	Purchasing	Job Order and TPA Logs	3	After 2nd year	2 years	-	Departmental Policy
Bureau of Street Environmental Services	Budget	Work Sheets, etc.	2	Until superceded or no longer applicable	-	-	Departmental Policy
Bureau of Street Environmental Services	Budget	Instructions	2	Until superceded or no longer applicable	-	-	Departmental Policy
Bureau of Street Environmental Services	Budget	Completed Budgets	3	Copies available	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services	Personnel	OSHA Logs	2	5 years	5 years		Departmental Policy
Bureau of Street Environmental Services	Personnel	Safety Records	2	3 years	3 years		Departmental Policy
Bureau of Street Environmental Services	Personnel	OSHA Logs	2	5 years	5 years		Departmental Policy
Bureau of Street Environmental Services	Personnel	Safety Records	2	3 years	3 years		Departmental Policy
Bureau of Street Environmental Services	Personnel	Personnel Records	1	Personnel records at 1155 Market	-	-	Departmental Policy



Bureau of Street Environmental Services	Personnel	Requisitions, Justifications, etc.	3	After 2nd year. Copies available from Personnel	2 years	-	Departmental Policy
Bureau of Street Environmental Services	Personnel	Certifications, As-Needed Lists, etc.	2	Until superceded or no longer applicable	-	-	Departmental Policy
Bureau of Street Environmental Services	Personnel	Interviews, Test Results, etc.	2	Until no longer needed	-	-	Departmental Policy
Bureau of Street Environmental Services	Supporting Documents	Notices for Cites and Warnings	3	After 5th year	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services	Supporting Documents	Citations for Cites and Warnings	3	Storage time may be extended due to Court action	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Personnel	Personnel Records	1	All official personnel records kept at 1155 Market	Permanent		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Personnel	Requisitions, Justifications	1	Copies available	Permanent		Departmental Policy

				from Personnel.			
Bureau of Street Environmental Services/Urban Forestry	Personnel	Certifications, Temp Exempt Lists	2	Until superseded or expired.	1 year		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Personnel	OSHA Logs	2	5 years	5 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Personnel	Safety Records	2	3 years	3 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	ID Work Activity	Estimates	2	5 years	5 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	ID Work Activity	Service Requests	2	2 years	2 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	ID Work Activity	Work Orders	2	5 years	5 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	ID Work Activity	Emergency Call-In Log	2	2 years	2 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Equipment	Equipment Sign-Out Sheets	2	1 year	1 year		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Purchasing	Purchase Orders, Contracts, Blanket PO's, Requisitions.	2	Copies available from the Controller.	1year		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Purchasing	Directives	1	Until superseded.	Permanent		Departmental Policy

Bureau of Street Environmental Services/Urban Forestry	Purchasing	Instructions	1	Until superseded.	Permanent		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Budget	Baseline	2	5 years	5 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Budget	Instructions	2	Until superseded.	1 year		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Budget	Completed Budgets	2	Copies available.	5 years		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Budget	Job Order and TPA Logs	3	After 2nd year	2 years	-	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Correspondence	General	2	5 years	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Correspondence	Director's Numbered Letters	1	Permanent	Permanent		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Correspondence	Legal (lawsuits, etc.)	1	Permanent	Permanent		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Correspondence	Directives	1	Until superseded	Permanent		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Correspondence	Instructions	2	Until not applicable			Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Timeroll Hardcopy	Work Report	2	6 years	2 years	4 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Timeroll Hardcopy	Monthly Time roll Amendments	2	6 years	2 years	4 years	Departmental Policy

Bureau of Street Environmental Services/Urban Forestry	Timeroll Hardcopy	Daily Overtime Report	2	6 years	2 years	4 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Timeroll Hardcopy	Laborer/Truck Driver Sign-In Sheets	3	After 5th year	1 year	4 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Permits and Applications	Tree Installation	1	Permanen t	Permanent		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Permits and Applications	Tree Removal		Permanen t	Permanent		Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Permits and Applications	Complaint Related Correspondence	3	To be filed in Complaint file	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Permits and Applications	Permit Related Correspondence	3	To be filed in Permit file	See specific type of permit	See specific type of permit	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Reports	Cities and Warnings	2	After 5th year	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Reports	Billings	3	After 5th year	2 years	3 years	Departmental Policy
Bureau of Street Environmental Services/Urban Forestry	Reports	Telephone Usage	2	After 1st year	1 year	-	Departmental Policy