

**Appendix A to
CONFIRE Administrative Committee Policy 1.004 – Record Retention**

Records Retention Schedule

Retention Key:

AU = Audit

S = Supersede

P = Permanent

L = Life

CL=Closed/Completion

T = Terminated

CU=Current Year

Department	Records Series	Retention	Description
Administration			
	Administration Files	2 years	
	Agreements – Executed	P	
	Audio Tapes – Board Meetings	1	
	Agenda – Board	3	
	Approved Minutes – Board	P	
	Subpoenas	2 years	
	Board Package Files	5 years	
	Union Elections	7 years	
	Tort Claims / Liability Claims	CL + 5 years	
	Master Contracts / Agreements	P	
	Official Reports Generated for Board	P	
	Policies and Procedures	S + 2 years	
	Press Releases	2 years	
	Vehicle Files (includes Pool Cars)	S + 2 years	
	Workplace Safety Inspections	2 years	
Building			
	All Construction finals	P	
	Building Permits w/ Inspection	P	
	Building Permits w/o Inspections	CL + 2 years	
	Fire Sprinkler Test	5 years	
	Card Key Records	1 year	
Dispatch			
	Reports <ul style="list-style-type: none"> Incident Reports Dispatch Calls 	5 years	
	Audio Recordings <ul style="list-style-type: none"> 911 Calls Emergency Radio 	2 years 2 years	

Department	Records Series	Retention	Description
	Dispatch, Telephone, 911 Calls Printout and Tapes	2 years	
	Radio Logs	7 years	
	EMD Quality Assurance Audits	2 years	
Finance			
Budget			
	Budgets	AU + 4 years	Includes budget preparation work papers, revisions, final and amended budgets.
Disbursements			
	Purchase Requisitions	AU + 1 year	
	Purchase Orders	AU + 4 years	
	Service Orders / Authorizations	AU + 4 years	
	Vendor Information	Active, AU + 1 year	
	Bids and Proposals – Successful	AU + 5 years	
	Bids and Proposals – Unsuccessful	CU + 2 years	
	Invoices / Credit Memos / Disputes	AU + 4 years	
Receipts			
	Deposit Records	AU + 4 years	
	Billing Records	AU + 4 years	Includes credit memos, reimbursements, and assessments.
Accounting			
	Expense Reports	AU + 1 year	
	Annual Financial Statements	AU + 7 years	
	Internal / External Audit Reports	AU + 7 years	
	Federal and State Tax Filings	P	
	Bonds	CL + 10 yrs	
	Grants	Active + 2 years , AU + 1 year	
	Grant Applications	CL + 1 year	
	Investment Transactions	P	
	Bank Reconciliations	AU + 5 years	
	General Ledger	P	

Department	Records Series	Retention	Description
	Journal Entries	AU + 4 year	Including supporting documentation.
	Unclaimed Property Research / Investigative Files	CL + 6 years	
	Delegation of Authority and Signature Records	S + 6 years	
Fixed Assets			
	Leases	Active, AU + 1 year	
	Hardware / Software Documentation	Active, S	
	Asset Records	L, AU + 4 yrs	Reflects purchase date, costs, asset number and description
	Additions / Disposals	L, AU + 4 yrs	
	Asset Ownership and Title	L	Includes title transfers when sold
Human Resources			
	Benefits Files	5 years	May include dental, disability, education, health, life and vision including dependent care
	Bargaining Units	10 years	
	Classification/Salary Plan	S + 2 years	Includes classification, wage rates
	Employee Medical Files	P	
	Employee Personnel Files	CL + 5 years	
	Labor Relations	2 years	
	Memoranda of Understanding	P	
	Personnel Board Findings / Opinions / Decisions	P	
	Personnel Board Documents	2 years	
	Personnel Rules	P	
	Recruitment	CU+ 3 years	
	Volunteer Files	2 years	
Information Technology			
	IT Inventory Records	Life of Equip + 2 years	
	Standard Operating Procedures	3 years	
	System Backup Files / Type Library / Digital Snapshot	3 mos.	
	System Log File (Mission Critical / External Agencies)	2 years	

Department	Records Series	Retention	Description
	System Log Files (Non-essential / PC Level)	3 mos.	
Payroll			
	Retirement Records and Calculations	P	
	Salary Records	T + 6 years	
	Payroll Register	P	
	Adjustments	AU + 6 years	
	Employee Time Sheets	AU + 6 years	
	Payroll Authorizations	T + 6 years	
Risk Management			
	CAL OSHA Inspection & Citations	P	
	Employee Training Records	10 years	
	Insurance Certificates	P	
	Workers Compensation	P	Claim Files, Reports, Incidents (working files) originals filed with HR Administrator
	Medical Leave	CL + 30 yrs	
Safety			
	MSDS Sheets	P	