

# **RECORDS RETENTION SCHEDULE**

**UPDATED APRIL 10, 2024  
RESOLUTION NO. 24-2447**

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## **INTRODUCTION**

Management of public records is a vital function of every city, and understanding the basic principles of records management is essential for every city official and staff member.

Under the Idaho Public Records Act, a public record is any recorded information that relates to the business of city government. Public records can be on any medium – paper documents, books, maps, pictures, audio/visual recordings, microfilm or microfiche, as well as digital or electronic documents, including computer files and email.

Idaho Code section 50-907(5) requires every city in Idaho to adopt a records retention schedule, listing the types of records retained by the city and the retention period for each type of record. Records must be retained for the specified retention period, and may be destroyed only pursuant to the direction of the City Clerk.

### **EMPLOYEES' ROLE IN RECORDS RETENTION**

All City of Meridian employees and elected officials have responsibilities with regard to City records. Employees, elected officials, and appointed officials must protect the records in their custody; cooperate with the City Clerk to efficiently manage records and preserve records of enduring value; and pass on to their successors records necessary for the continuing conduct of City business.

Idaho Code section 50-908 outlines the role and responsibilities of the City Clerk as municipal records manager. That law directs the City Clerk to: ensure the orderly and efficient management, retention, and destruction of City records in compliance with state and federal laws and City ordinances, resolutions and policies; identify and care for historical records; and coordinate the transfer of historical and permanent records to the Idaho State Historical Society (“ISHS”).

All City records are property of the City, and no City official, elected, appointed or staff, may assert any personal or property right to such records. The unauthorized destruction or removal of City records is prohibited.

### **CLASSIFICATION AND RETENTION OF MUNICIPAL RECORDS**

Idaho Code sections 50-907(1– 4) lists four categories for municipal records: permanent, semipermanent, temporary, and historical. The provisions relating to these categories enumerate specific record types that must be designated with the respective category and retention period. The statute allows cities to designate additional records for each classification as deemed appropriate by the City Council. Pursuant to its authority under Idaho Constitution Art. XII, section 2, the City has created a “transitory” category, for records of ephemeral or task-based utility.

Idaho Code section 50-907(7) addresses the destruction of records following the expiration of their retention period. Permanent records may not be destroyed, but must be retained by the City in perpetuity. If retained in digital form, prior to its destruction, the paper original must be offered to ISHS for permanent retention, pursuant to the procedures established in

Idaho Code sections 50-907(6) and (7). Historical records must be retained in perpetuity, in their original form, or transferred to ISHS.

Semipermanent records must be retained for not less than five (5) years after the date of issuance or completion of the matter contained within the record, and temporary records for not less than two (2) years. After the expiration of the designated retention period for semipermanent and temporary records, they may be destroyed only by resolution of the City Council, upon advice of the City Attorney, and in coordination with the City Clerk, according to the procedures established in Idaho Code section 50-907. Transitory records may be destroyed upon expiration of the designated retention period according to the procedure established by the custodial department.

### **DESTRUCTION OF RECORDS**

The departments, the City Clerk, and the City Attorney's Office work together to accomplish final disposition of records according to the process set forth in Idaho Code section 50-907. The first step in the official record destruction process is that the City Clerk obtains approval for the destruction of the records from the City Attorney's Office. The City Attorney's Office prepares a resolution and submits it to City Council for approval to destroy the records. Depending on the records to be destroyed, the City Clerk may be required to notify the ISHS at least thirty (30) days prior to destruction. When all of the steps are complete, the City Clerk notifies the department that it may destroy the designated records. The department destroys the records within thirty (30) days of notification and returns proof of destruction to the City Clerk.

### **EXCEPTIONS – RECORDS THAT CANNOT BE DESTROYED**

The process for destruction of all nonpermanent records typically begins once the records have reached their minimum retention period, but there are some important exceptions, where circumstances dictate that records must be kept beyond their designated retention period:

- Records related to pending criminal or civil cases;
- Records that are responsive to a pending public records request or subpoena; and
- Records needed for any pending audit or investigation.

### **DIGITIZING AND DESTROYING PAPER RECORDS**

A. **Permanent Records.** Pursuant to Idaho Code section 50-907(6)(e), where a department retains a permanent record in paper form and wishes to retain it in digital form instead, the department must follow this process:

1. The department scans or otherwise digitizes the paper records. The paper record is now a copy. The department must keep the paper copies until Clerk notifies per step 4(b), below (preferably storing the copy in a file folder or box labeled "Copies of permanent records – to be destroyed").
2. The department makes a list of the paper copies to be destroyed, in the following format:

Record title from retention schedule	Record description from retention schedule	Year(s) of record whose paper copy will be destroyed
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3. The department transmits the list to the City Clerk, on an annual basis, upon City Clerk's request.
4. Annually, the City Clerk transmits the compiled list to ISHS.
  - a. If ISHS wants the paper copies: Clerk transmits list to City Attorney's Office, City Attorney's Office prepares City Council resolution, City Council approves transfer of copies to ISHS via resolution, City Clerk collects copies from the department and transmits them to ISHS.
  - b. If ISHS does not want the paper copies: Clerk notifies the department that the paper copies may be destroyed. The department destroys paper copies.
  - c. If 30 days go by with no response: Clerk notifies the department the paper copies may be destroyed. Department destroys paper copies.

**B. Semipermanent or Temporary Records.** Pursuant to Idaho Code section 50-907(6)(d), where a department retains a semipermanent or temporary record in paper form and wishes to retain it in digital form instead, the department must follow this process:

1. The department scans or otherwise digitizes the paper records. The paper record is now a copy.
2. The department destroys the paper copy. The digital copy is now the record, and must be retained for the retention period specified in the retention schedule.

**CITY ATTORNEY’S OFFICE**

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Legal Department</b>			
<b>Bankruptcy Notices and Case Files</b>	Records documenting notification to the city that certain individuals have filed for bankruptcy, and used to determine if the individual owes money to the city and to file notice or claim with the court. Information may include: debtor’s name, utility accounts information, prepared repayment plan and related documentation.	Semipermanent <i>IC §50-907(2)(a,g)</i>	<b>Destroy records for which Trustee Final Report or an Order Dismissing the Case was entered on or before December 31, 2018</b>
<b>Civil Case Files</b>	Records related to cases filed by and against the City, including bankruptcy litigated claims and land use judicial review/appeals . Includes complaints, summons, investigations, reports, attorney notes, discovery-related records, pleadings, affidavits, motions, deposition transcripts, disposition, orders and judgments, exhibits, appeals, and related records.	Semipermanent <i>IC §50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Contracts</b>	Agreements with outside counsel, investigators, representatives, and other parties approved by the City Attorney.	Semipermanent <i>IC §50-907(2)(b)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Departmental Reports</b>	Reports prepared by the city attorney for the mayor and city council.	Semipermanent <i>IC §50-907(2)(e)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Forms and Agreements</b>	Forms and agreements prepared by City Attorney’s Office ( <i>e.g.</i> consent forms, acknowledgement forms, waiver agreements, liability agreements).	Semipermanent <i>IC §50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Legal Opinions, Memoranda</b>	Formal and informal opinions and memoranda rendered by the city attorney for the mayor, city council, or city departments, examining legal questions relating to state/federal law/rules or local ordinances/policies.	Semipermanent <i>IC §50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Privileged Administrative Records</b>	Records held in confidence by the City Attorney's Office regarding confidential or privileged matters including personnel investigations, settlements related to personnel matters.	Semipermanent <i>IC §50-907(2)(g)</i>	<b>Destroy records related to employees separated on or before December 31, 2018</b>
<b>Settlement Records</b>	Settlement agreements and related documentation from civil cases, claims, mediation, and arbitration.	Semipermanent <i>IC §50-907(2)(g)</i>	<b>Destroy records related to settlements in which all parties' obligations are fulfilled on or before December 31, 2018</b>
<b>Risk Management</b>			
<b>Claim Files</b>	Claims for damages filed by and against the city, including claims caused by City employees/ equipment, including tort claims, property damage records, and related correspondence.	Semipermanent <i>IC §50-907(2)(a,g)</i>	<b>Destroy records of unlitigated claims dated on or before December 31, 2018 (See Civil Case Files for litigated claims)</b>

## CITY CLERK'S OFFICE

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Administrative Records</b>			
<b>Correspondence</b>	Records created or received in the course of administering city policies, procedures or programs, but these records do not provide insight into significant policy, procedure or program discussions or decisions.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Operational Records</b>			
<b>Audio/Video Recordings</b>	Audio and video recordings of City Council, Commission and Committee Meetings.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Contracts &amp; Agreements to which the City is a Party</b>	Agreements with vendors and other parties for the acquisition, lease, lease-purchase or sale of equipment, supplies, services or property, letters of credit, warranty surety agreements which have been approved at a City Council meeting, approved by the Mayor, or have been recorded with Ada County.	Semipermanent <i>IC §50-907(2)(b)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Permits &amp; Licenses</b>	Records relating to city permits and licenses issued in the City Clerk's Office.	Semipermanent <i>IC §50-907(2)(d)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Public Records Requests</b>	Written public records requests, city denials of public records requests, responses, etc.	Temporary	<b>Destroy records in which last action was taken December 31, 2022</b>

### COMMISSIONS,\* COMMITTEES, AND BOARDS

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Audio Recordings</b>	Audio recordings of commission, committee, or board meetings.	Semipermanent <i>IC §§ 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>

\*Note: This schedule does not apply to City Council or Planning & Zoning Commission records, which are addressed in Clerk's Office Records Retention Schedule.

**COMMUNITY DEVELOPMENT DEPARTMENT**

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Administrative – All Divisions</b>			
<b>Committee/Ad-Hoc Team Records</b>	Agendas and meeting minutes/notes for special groups convened by Community Development for specific purposes such as understanding operational gaps, Code issues, and process delays.	Temporary	<b>Destroy records dated on or before December 31, 2021</b>
	Departmental records created or received in the course of administering departmental policies, procedures, or programs, but these records do not provide insight into significant policy, procedure, program, discussions, or decisions. Including, but not limited to: citizen response letters.	Temporary	<b>Destroy records dated on or before December 31, 2018</b>
<b>Zoning Verification Letter</b>	Documents, including, but not limited to: written requests for zoning analysis of a specific parcel/property and the responsive departmental opinion.	Semi-permanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Building Division – Commercial and Government Buildings</b>			
<b>All building records regarding commercial and government buildings dated before January 2012</b>	All records regarding commercial and government buildings dated before January 2012.	Semi-permanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Planning Division – Administrative Applications</b>			
<b>Sign: Planned Sign Program (No longer issuing, but still have existing records)</b>	Documents, including, but not limited to approved application, and sign requirements for a specific project.	Semi-permanent	<b>Destroy records dated on or before December 31, 2018</b>

## FINANCE DEPARTMENT

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Administrative – All (Administration, Arts &amp; Culture, Billing, Budget, Controller, Purchasing)</b>			
	Records created or received in the course of administering city policies, procedures or programs, but these records do not provide insight into significant policy, procedure or program discussions or decisions. Including but not limited to Citizen Response letters, billing adjustment requests, etc.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Accounting</b>			
<b>Accounts Payable</b>	Records documenting payment of city bills, including reports, invoices, check stubs, purchase orders, payment authorizations.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Accounts Receivable</b>	Records documenting billing and collection of monies owed to the city by vendors, citizens, organizations, governments, etc. Records include: reports, receipts, invoices, statements, etc. Information typically includes: receipt amount, date, invoice number, name, account number, account balance, adjustments, etc.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Cash Receipts</b>	Receipt and supporting documentation.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Grant Records</b>	Records documenting the application, evaluation, awarding, administration, reporting and status of grants applied for, received, awarded or administered by the city. Records include: applications and proposals, summaries, objectives, activities, budgets, exhibits, award notices, progress reports, contracts, financial reports, and related correspondence and documentation.	Semipermanent <i>IC §50-907(2)(g)</i>	<b>Destroy records of grants closed out on or before December 31, 2013</b>
<b>Liens</b>	Liens held by the city and any corresponding release of liens.	Semipermanent Insert Code	<b>Destroy records dated on or before December 31, 2018</b>
<b>Sales &amp; Use Tax Forms</b>	Used to report and remit sales tax collected and due to the state.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Travel Records</b>	Records documenting requests, authorizations, reimbursements, and other actions related to employee travel,	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
	including expense reports and receipts, vouchers and related documents.		
<b>Budget</b>			
<b>Financial Reports Quarterly Published</b>	Reports documenting the financial condition and operation of the city, Reports include information on revenues and expenditures in relation to the final budget.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Financial Reports Year End</b>	Reports and data used to document the financial condition and operation of the city, sub ledgers related to, but not including the final Audit Report.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Bank Transaction Records</b>	Records documenting the status and transaction activity of city bank accounts, including account statements.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Budget Records</b>	Records used in preparing and adopting the city budget, including revenue projections, instructions, department requests, worksheets, council-approved tentative budget and notice of budget hearing, adopted appropriations ordinance and amendments, and other information.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Capital Asset Records – Purchase</b>	Record of purchase, vendor invoice and related documents.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Capital Asset Records – Disposal</b>	Record of disposal, department request of disposal.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Gift and Contribution Records</b>	Records documenting gifts and contributions to the city.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Chief Financial Officer</b>			
<b>Investment Records</b>	Reports, statements, summaries, correspondence and other records documenting and tracking investments made by the city, including the Local Government Investment Pool.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Controller</b>			
<b>Accounting Software Records</b>	Transaction records within the Accounting Software system: including – payroll, vendor listing, vendor payments, vendor purchase orders, budget transactions, cash receipts, and general ledger.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Bond Sales</b>	Monthly bond statements, payments of bonds	Semipermanent	<b>Destroy records of bonds paid in full on or before December 31, 2018</b>
<b>Departmental Reports</b>	Reports documenting the financial condition and operation of the city, issued on a monthly, quarterly, annual or other basis, including quarterly published treasurer’s report and year-end financial reports. Reports include information on revenues and expenditures in relation to the final budget.	Semipermanent <i>IC §50-907(2)(e)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>General Ledgers</b>	Records documenting the summary of accounts reflecting the financial position of the city, showing debit, credit and balance amounts per account, budget, fund and department, asset depreciation, and totals for notes receivable, interest income, amounts due from other funds, bank loans received, cash in escrow, deferred loans received, cash, revenue, accounts receivable, accounts payable, etc.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Journal Entries</b>	Records including detailed reports and back up documentation for journal entries.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Payroll</b>			
<b>Administrative Reports</b>	Reports, statistical studies, and other records designed and used for budget preparation, projections, workload and personnel management, and research and general reference.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Deduction Authorization Records</b>	Records documenting employee authorization for voluntary payroll deductions. Records may include: direct bank deposits, insurance applications, enrollment cards, deduction authorizations, approval notices,	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records related to employees separated on or before December 31, 2018</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
	deduction terminations, and related records.		
<b>Federal &amp; State Tax Records</b>	Records, in addition to those itemized in this section, used to report the collection, distribution, deposit, and transmittal of federal and state income taxes as well as social security tax. Examples include: the federal miscellaneous income statement (1099), employers' quarterly federal tax return (941, 941E), tax deposit coupon (8109), and similar federal and state completed forms.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Garnishment Record</b>	Records documenting requests and court orders to withhold wages from employee earnings for garnishments, tax levies, support payments, and other reasons. Usually includes original writs of garnishment, orders to withhold, federal or state tax levies, recapitulations of amounts withheld, and related records. Information usually includes: employee name and social security number, name of agency ordering garnishment, amount, name of party to whom payment is submitted, dates, and related data.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records related to employees separated on or before December 31, 2018</b>
<b>Registers Year End</b>	Payroll Registers: Registers or records serving the same function of documenting the earnings, voluntary and required deductions, and withholdings of city employees. Information usually includes employee name and social security number, hours worked, rate, overtime, vacation value, various allowance, gross pay, federal and state withholding, voluntary deductions, net pay, and related data.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Time Records</b>	Records documenting hours worked, leave hours accrued, and leave hours taken by city employees. Information usually includes: employee name and employee number, hours worked, type and number of leave hours taken, total hours, dates and related data.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records related to employees separated on or before December 31, 2018</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>W2s</b>	Annual statements documenting individual employee earnings and withholdings for state and federal income taxes and social security tax, also known as federal tax form W-2. Information includes: city name and tax identification number, employee name and social security number, wages paid, amounts withheld, and related data.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>W4s</b>	Certificates documenting the exemption status of individual city employees, also known as W-4 forms. Information includes: employee name and address, social security number, designation of exemption status, and signature.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records related to employees separated on or before December 31, 2018</b>
<b>PERSI Records</b>	Records relating to PERSI, including Employer Remittance Forms, invoices, correspondence, financial adjustments, etc.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Unemployment Reports</b>	Records documenting employee earnings on a quarterly basis. Used to document costs and charges in the event of an unemployment compensation claim. Information includes: employee name and social security number, quarterly earnings.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Purchasing</b>			
<b>Contracts</b>	Agreements with vendors and other parties either in hard copies or contained on the Contract Management Database for the acquisition or sale of equipment, supplies, services or property, also includes insurance certificates, payment and performance bonds pertaining to a solicitation or contract that Purchasing is facilitating.	Semipermanent <i>IC §50-907(2)(b)</i>	<b>Destroy records related to contracts completed on or before December 31, 2013</b>
<b>Lease Agreements</b>	Lease agreements for property or equipment.	Semipermanent <i>IC §50-907(2)(b)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Purchase Orders</b>	Requests and purchase orders for goods or services purchased by the city. Information includes: department, delivery location, date, quantity, description, unit and total price, and authorizing signatures.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2013</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Purchasing Selection</b>	Records documenting competitive bidding and purchase of goods, services, and public works construction, and procurement of design professionals. Records include: published notices and solicitations, specifications, bids, requests for qualifications, statements of qualifications, etc.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records related to bids awarded on or before December 31, 2013</b>
<b>Utility Billing</b>			
<b>Adjustment Registers</b>	Records documenting adjustments to customer water, sewer, garbage or other city-provided service billings for debits, credits, refunds, returned checks, and related reasons. Information usually includes: customer's name and address, type of adjustment, justification, amount changed, authorizing signatures and other information. (Records held within the billing software).	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Billing Directive</b>	Application completed by owner or property manager to initiate Third Party billing for specified utility account. Information included: owner, property manager, tenant, move-in date, and service address.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Billing/Payment Registers</b>	Records documenting transactions on the water, sewer, garbage or other city-provided service account of each customer. Useful for reference to assure accurate customer billings and posting of payments. Information often includes: customer's name, service address, meter reading, water usage, utility charges, payments, adjustments and related data. (records held within the billing software).	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Change Record</b>	Records documenting routine information changes to customer accounts, including name and address. (Records held within the billing software).	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Customer File</b>	General correspondence and forms related to a specific utility account. This information would be in addition to that found within the billing software. Documents in file may include and are not limited to: general letters, payment	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
	arrangement forms, third party billing docs, hard copies of customer history reports, leak adjustment requests, letters submitted to the City for customers.		
<b>Disconnect Notice to City Council</b>	Notice to City Council to verify that no customer currently slated for shut off due to non-payment has requested a hearing with the Board of Adjustment. Notice includes number of customers slated for shut off and the value of the delinquent accounts.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Disconnect Record</b>	Records documenting a customer's request for disconnection of water, sewer, garbage or other city-provided services. (Records held within the billing software).	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Meter Readings</b>	Document the readings of customer water meters for billing purposes. Information typically includes: meter reading, date read, account number, billing code, final reading, reason for turnoff, meter changes, and related data. (records held within the billing software)	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Renter Addendums</b>	Supplemental document completed by the tenant to accept the third party billing for specified utility account. Information included: tenants name, service address, mailing address and phone number.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Security Deposit Records</b>	Records documenting customer payment of a security deposit to receive temporary dumpster services. Information usually includes date, amount of deposit, customer's name, address, and account number, date account closed, refund date, amount of deposit applied, and related information.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Shut Off Turn On</b>	Electronic spreadsheet used during shut off day by water department field staff and MUBS. Tracks customers that are to be shut off, payments, and turn-ons as authorized. Record includes: Customer name, service address, meter id, time of shut off, time of payment, time of turn-on, fee waived if applicable and general notes.	Semipermanent <i>IC §50-907(2)(a)</i>	<b>Destroy records dated on or before December 31, 2018</b>

## FIRE DEPARTMENT

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Car Seat Inspections</b>	Car seat inspection forms.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
	General administrative correspondence, including records created or received in the course of administering city policies/programs, but not related to significant policy/program discussions or decisions. Includes customer survey cards.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Equipment and Vehicle Test, Maintenance &amp; Repair Records</b>	Records relating to equipment and vehicles owned and serviced by the City documenting maintenance and repairs of equipment, vehicles and other assets with a useful life generally more than five years. Includes the following: fire hose records (such as test date, date previously tested, apparatus number, station number, hose diameter, conditions found, service date, defects corrected, etc.), annual ladder inspections and test results, tests done on SCBA's (including flow testing), etc. Vehicle maintenance records, inspections, pump testing and repair records of apparatus. Emergency medical equipment maintenance records used to verify regular maintenance of emergency medical equipment such as copies of contracts, maintenance schedules, test protocols, equipment inventory, performance test records, repair records, parts used and service reports. Per NFPA Standards 1901, 1961, 1852 and 1500.	Semipermanent	<b>Destroy records of vehicles disposed on or before December 31, 2018 (if no ongoing administrative need for such records)</b>
<b>Inspection records</b>	Documents relating to fire code inspections performed by the department, including inspections of home daycares and foster care homes, commercial buildings, and subdivisions. May include reports, notices, citations, occupancy and pre-fire planning records, floor plans, sketches, reports, lists, Tier II reports, and related documents.	Semipermanent	<b>Destroy records dated on or before December 31, 2003</b>
<b>Buildings &amp; Subdivisions – Demolished or No Longer in Existence (never constructed)</b>	Fire inspection records relating to buildings and subdivisions that have been demolished or are otherwise no longer in existence (never constructed).	Temporary	<b>Destroy records of buildings and subdivisions last inspected on or before December 31, 2020</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Meeting Minutes</b>	Final, approved Officer and Command Staff meeting minutes.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Narcotics Inventory &amp; Usage</b>	Narcotic inventory and usage- hard copy, narcotics distributed to the engine companies.	Temporary	<b>Destroy records dated on or before December 31, 2020</b>
<b>Public Education Programs &amp; Publications</b>	Records related to the design and implementation of educational and other outreach programs provided to the public by the department. May include: class descriptions, instructional materials, course outlines, class enrollment and attendance records, reports, speeches, and publications.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Public Record Requests</b>	Public records requests and responses.	Temporary	<b>Destroy records of PRRs for which last action is dated on or before December 31, 2018</b>
<b>Ride-Along Forms</b>	Signed waivers for persons requesting a ride-along with the department. Ride Along tracking records.	Temporary	<b>Destroy records dated on or before December 31, 2021</b>
<b>Structure Burn Training Records</b>	Records related to structure burns.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>

## HUMAN RESOURCES DEPARTMENT

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Affirmative Action; Equal Employment Opportunity Commission Reports</b>	Records documenting city compliance with the Civil Rights Act of 1964, the Equal Employment Opportunity Act of 1972 and the Americans with Disabilities Act. Records include: plans, policy statements, reports, investigations, case files and related information. Also includes EEO-4 reports submitted to the Equal Employment Opportunity Commission (EEOC) documenting compliance with EEOC requirements by cities with 15 or more employees.	Semipermanent <i>IC § 50-907(2)(g);</i> <i>29 CFR</i> <i>1602,1602.14,</i> <i>1620.32</i>	<b>Destroy records related to requests or actions taken on or before December 31, 2018</b>
<b>Benefits Continuation</b>	Records documenting notice to employees, spouses and dependents informing them of their rights to continue insurance coverage after termination or disability or family leave and whether coverage was elected or rejected. Continuation may be under COBRA or another provision. Notice is also sent to a third party administrator who administers the extended coverage. Records may be filed with the Employee Benefits Records or Employee Personnel Records.	Semipermanent <i>IC § 50-907(2)(g);</i> <i>29 CFR 1627.3</i>	<b>Destroy records dated on or before December 31, 2016 after employee separation, expiration of eligibility, or completion of litigation, whichever is longest</b>
<b>Budget Prep Records</b>	Working documents utilized to build base budgets and establish yearly budgets; worksheets, enhancements, amendments, etc.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Collective Bargaining</b>	Records documenting negotiations between the city and employee representatives, including contracts, reports, negotiation notes, letters of agreement, arbitration findings, cost analyses, minutes, tape recordings, etc.	Temporary <i>IC § 50-907(3)(d);</i> <i>29 CFR 516.5</i>	<b>Destroy records dated on or before December 31, 2020</b>
<b>Committee Records</b>	Agendas and meeting minutes/notes for special groups convened by HR for specific purposes such as Benefits, Compensation, and Wellness.	Semipermanent	<b>Destroy records dated on or before December 31, 2016</b>
<b>Correspondence, Administrative</b>	Correspondence created or received in the course of administering City policies and programs.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Department Guidelines, Policies, Procedures, Processes, and Reports</b>	HR guidelines, including but not limited to, Salary Administration Guidelines.	Semipermanent	<b>Destroy records dated on or before December 31, 2013 from date guideline in its entirety, or any part thereof, is officially replaced, updated</b>
	City Standard Operating Policy/Procedure Manual.	Semipermanent	<b>Destroy replaced/ updated SOP Manual versions dated on or before December 31, 2003</b>
	Records documenting and relating to HR processes, including but not limited to, recruiting/interviewing processes.	Semipermanent	<b>Destroy records related to replaced/ updated HR processes dated on or before December 31, 2018</b>
	Policies, reports, and documents regarding the internal department operations and procedures (e.g. Turnover, Recruiting reports, etc.).	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
	HR reports regarding department performance or other management presentations. Includes reports documenting trends, department or City performance in key areas as determined.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Employee Benefits</b>	Records relating to city employee benefits information such as: selection of insurance plans, retirement, pension, and disability plans, deferred compensation plans, and other benefit information. Records may include but are not limited to: plan selection and application forms, enrollment records, contribution and deduction summaries, personal data records, authorizations, beneficiary information, notices of disability payment made, and related documentation.	Semipermanent <i>IC §§ 50-907(2)(g) and 45-610; 29 CFR 1627.3; 29 CFR 1602.31; IDAPA 09.01.35.081</i>	<b>Destroy records related to employees who have separated, whose benefit eligibility has expired, and who have completed any related litigation on or before December 31, 2016</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Employee Medical Records</b>	Document an individual employee's medical history. These records are not personnel records and must be kept in a separate location from employee personnel records as required by the Americans with Disabilities Act. Records may include, but are not limited to: medical exam records (pre-employment, pre-assignment, periodic or episodic), X-rays, and records of significant health or disability limitations.	Semipermanent <i>IC §§ 50-907(2)(g) and 72-601; 29 CFR 1602.31; 29 CFR 1910.1020</i>	<b>Destroy records related to employees who have separated, whose benefit eligibility has expired, and who have completed any related litigation on or before December 31, 1948</b>
<b>Employee Personnel Records</b>	<p>Document of employee's work history. Original employee personnel records are kept by Human Resources Department unless otherwise specified. Records may include, but are not limited to: employment applications, notices of appointment, training and certification records, records of health limitations, drug testing, salary schedules, personal actions, performance evaluations, awards and other special recognition, letters of recommendation, investigation information, disciplinary action, notices of layoff, letters of resignation, home address and telephone, emergency notification forms, oaths of office, grievance and complaint records, and relate correspondence and documentation. (See also Employee Benefits Records, Employee Medical Records, Recruitment and Selection Records, and Volunteer Records).</p> <hr/> <p>Notes:</p> <p>(1) Meridian Police Department employee personnel records including original Internal Affairs files and training materials are kept by the Police Department according to the Police Department Records Retention Schedule. Upon employee separation, these records shall be forwarded to Human Resources Department.</p> <p>All other Police Department current employee original personnel records are kept by the Human Resources Department.</p>	Semipermanent <i>IC §§ 50-907(2)(g) and 45-610; 29 CFR 1627.3; 29 CFR 1602.31; IDAPA 09.01.35.081</i>	<b>Destroy records related to employees who have separated, whose benefit eligibility has expired, and who have completed any related litigation on or before December 31, 2018</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
	<p>(2) Meridian Fire Department employee personnel records including original training records and original records related to Union promotions are kept by the Fire Department. Upon employee separation these records shall be forwarded to Human Resources Department.</p> <p>All other Fire Department current employee original personnel records including ICRMP and BEST training records and Union member promotion applications and PAR forms documenting a promotion are kept by Human Resources Department.</p>		
<p><b>Employment Verification (I-9) of Job Applicants</b></p>	<p>Document to the U.S. Immigration and Naturalization Service that an applicant or employee is eligible to work in the U.S. Information includes: employee information and verification data such as citizenship or alien status and signature, employer review and verification data such as documents, which establish identity and eligibility, and employer's signature certifying that documents were checked. This category includes forms completed for all new hires, as superseded or previous forms completed on rehires.</p>	<p>Temporary  <i>IC § 50-907(3)(d)</i>,        8 U.S.C. §        1324a(b)(3)  <i>(Immigration Reform and Control Act)</i></p>	<p><b>Destroy records related to employees hired on or before December 31, 2020</b></p> <p><b>Destroy records related to applicants not hired dated on or before December 31, 2022</b></p>
<p><b>Hazard Exposure Records</b></p>	<p>Emergency response employees exhibiting signs or symptoms possibly resulting from exposure to hazardous substances are required to be provided medical examination and consultation. Records include: employee's name and social security number; physician's written opinion, recommended limitations; results of examinations and tests; employee medical complaints related to hazardous substance exposure; description of employee's duties as they relate to exposure; the employee's exposure levels or anticipated exposure levels; description of protective equipment used; and information from previous medical examinations of the employee which is not readily available to physician and other information.</p>	<p>Semipermanent  <i>IC § 50-907(2)(g)</i>;  <i>29 CFR 1910.1020</i></p>	<p><b>Destroy records related to employees who have separated, whose benefit eligibility has expired, and who have completed any related litigation on or before December 31, 1993</b></p>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Insurance Policies/Plans: Employee Group Health and Life Benefits</b>	Records documenting plan descriptions and summaries of city insurance policies and plans covering employee group health and life benefits, including annual certification records.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Kinds and Levels Chart, General Employee or Police Step Plan</b>	Records documenting the description, classification and compensation of city jobs and positions. Usually includes details of duties and responsibilities of each position time percentage breakdowns of tasks, skills and abilities needed for each position, and related records documenting the development, modification or redefinition of each job or position.	Temporary <i>IC § 50-907(3)(d); 29 CFR Part 1602 and 29 CFR 1627.3</i>	<b>Destroy records dated on or before December 31, 2020</b>
<b>Leave Applications</b>	Applications or requests submitted by city employees for compensatory, family and medical leave, long term leave and other leave time. Information usually includes: employee name, department, date, leave dates requested, type of leave requested, and related data. These are not kept by Finance.	Temporary <i>IC §50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2020</b>
<b>Personnel Action (PAR) Forms</b>	Completed employee forms submitted to HR upon initial hire, pay increase or decrease, change of address, or change of supervisor.	Semipermanent <i>IC § 50-907(2)(g); 29 CFR Part 1602 and 29 CFR 1627.3</i>	<b>Destroy records related to employees who have separated, whose benefit eligibility has expired, and who have completed any related litigation on or before December 31, 2018</b>
<b>Position Descriptions</b>	Records documenting the description, classification and compensation of city jobs and positions. Usually includes details of duties and responsibilities of each position time percentage breakdowns of tasks, skills and abilities needed for each position, and related records documenting the development, modification or redefinition of each job or position.	Temporary <i>IC § 50-907(3)(d); 29 CFR Part 1602 and 29 CFR 1627.3</i>	<b>Destroy records dated on or before December 31, 2020</b>
<b>Presentations</b>	Formal departmental presentations to Council, other formal bodies.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Recruitment and Selection Records for Applicants who are Hired</b>	Documents regarding the recruitment and selection of city employees and contracted service providers such as attorneys, auditors, consultants, etc. Records may include, but are not limited to: job announcements and descriptions, applicant lists, applications and resumes, position advertisement records, civil service and other examination records, interview questions, interview and application scoring notes, applicant background investigation information, polygraph test results, letters of reference, civil service records, staffing requisition forms, certification of eligibles, recruitment file (job announcement, position description, documentation relating to the announcement and test, and test items and rating levels), and related correspondence and documentation.	Temporary <i>IC § 50-907(3)(d);</i> <i>29 CFR 1602.31;</i> <i>29 CFR</i> <i>1627.3(b)(1)(vi)</i>	<b>Destroy records dated on or before December 31, 2021</b>
	Meridian Police Department employee original background investigation records are kept by the Police Department. Upon employee separation these original records shall be forwarded to the Human Resources Department for proper disposition.	Temporary	<b>Destroy records related to employees who separated on or before December 31, 2021</b>
	Meridian Fire Department Union original recruitment records including National Testing Network testing, application, and interview notes, for applicants who are hired, are kept by the Fire Department until the expiration of the retention period at which time they shall be properly destroyed by the Fire Department.	Temporary	<b>Destroy records dated on or before December 31, 2021</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Recruitment and Selection Records for Applicants who are Not Hired</b>	Documents regarding the recruitment and selection of city employees and contracted service providers such as attorneys, auditors, consultants, etc. Records may include, but are not limited to: job announcements and descriptions, applicant lists, applications and resumes, position advertisement records, civil service and other examination records, interview questions, interview and application scoring notes, applicant background investigation information, polygraph test results, letters of reference, civil service records, staffing requisition forms, certification of eligibles, recruitment file (job announcement, position description, documentation relating to the announcement and test, and test items and rating levels), and related correspondence and documentation.	Temporary <i>IC § 50-907(3)(d); 29 CFR 1602.31; 29 CFR 1627.3(b)(1)(vi)</i>	<b>Destroy records dated on or before December 31, 2021</b>
	Meridian Fire Department Union original recruitment records including National Testing Network testing, application, and interview notes, for applicants who are not hired, are kept by the Fire Department until the expiration of the retention period at which time, they shall be properly destroyed by the Fire Department	Temporary	<b>Destroy records dated on or before December 31, 2021</b>
<b>Special Projects</b>	Documents related to special, one-time projects to include, but not limited to, Employee Satisfaction Survey, Policy Review/Revision, Salary Structure Review.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Surveys</b>	HR and other initiated internal surveys, survey results (e.g. Salary Surveys, Employee Satisfaction Surveys, Best Place to Work. Etc.).	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Training Programs/HR</b>	Records related to the design and implementation of training programs provided to employees by the City. Documents may include course descriptions, instructor certifications, instructional materials, course outlines, class enrollment and attendance records, tests, test results, and related records.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018 from final presentation and/or use</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Training/Travel Records</b>	Records documenting attendance and presentation by HR employees at conventions, conferences, seminars, workshops, and similar training events. Includes training/travel requests, training materials, reports and related correspondence.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Payroll Unemployment Claims</b>	Records documenting claims submitted by former city employees for unemployment compensation. Usually includes: claims, notices, reports, and related records. May also include records generated by the appeal of claim determinations. These are received by HR and kept in HR.	Temporary <i>IC §50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Wellness Program</b>	Records related to the management and administration of the Wellness Program including:		
	<ul style="list-style-type: none"> <li>Wellness Challenges - Correspondence and other Challenge documentation.</li> </ul>	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
	<ul style="list-style-type: none"> <li>Wellness Committee Meeting Agendas and Minutes</li> </ul>	Semipermanent	<b>Destroy records dated on or before December 31, 2016</b>
	<ul style="list-style-type: none"> <li>Wellness Day Off –Incentive Verification Forms for Day Off Requests</li> </ul>	Semipermanent	<b>Destroy records dated on or before December 31, 1948 (retained in accordance with Employee Benefit records retention period)</b>
<b>Workers' Compensation Records and Claims</b>	Medical records related to job assignments that document work-related injuries and illnesses, including but not limited to, hearing test records, hazard exposure records, first- aid incident records, physician statements, release consent forms and related correspondence, and records documenting claims submitted by city employees for work-related injuries and illnesses. These records are kept separate from employee personnel files.	Semipermanent	<b>Destroy records dated on or before December 31, 1993 after employment separation</b>

## INFORMATION TECHNOLOGY (I.T.) DEPARTMENT

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Administrative</b>			
<b>Correspondence</b>	Records created or received in the course of administering city policies, procedures or programs, but these records do not provide insight into significant policy, procedure or program discussions or decisions.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Operational Records</b>			
<b>Service Management Tool</b>	All customer support tickets opened in service management systems.	Semipermanent <i>IC §50-907(2)(g) (other)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Department Policies and Reports</b>	Policies, reports, and documents regarding internal department operations and procedures, <i>e.g.</i> computer usage policy, password policy, service level goals, training materials, evaluations of materials.	Semipermanent <i>IC §50-907(2)(e) (dept. report)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Outlook E-mail Messages –City Staff</b>	All e-mail messages, sent or received by City staff using City’s e-mail system. (E-mail messages may be preserved elsewhere in digital or paper format for longer periods of time as the subject matter of such messages may require.)	Semipermanent <i>IC §50-907(2)(g) (other)</i>	<b>Destroy records dated on or before December 31, 2018</b>

**MAYOR'S OFFICE**

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Administrative Records</b>			
<b>Correspondence</b>	Correspondence created or received in the course of administering city policies/programs, but these records do not provide insight into significant policy/program discussions or decisions. May include citizen response letters, letters to homeowner associations and businesses.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Economic Development - Community Development Block Grant (CDBG)</b>			
<b>Subrecipient Agreements and Supporting Documents</b>	Documents, including, but not limited to agreements, Consolidated Annual Performance Evaluation Report (CAPER), sub-recipient agreements, environmental review records, PSAs (and corresponding products), sub-recipient reporting documents (activity reports, draw requests, labor files), etc.	Semi-permanent	<b>Destroy records related to CAPER completed on or before program year ending on or before December 31, 2018</b>
<b>Operational Records</b>			
<b>Agendas &amp; Minutes</b>	Agendas and minutes of Director Meetings, Operational Meetings, Mayor's Youth Advisory Council, Mayor's Senior Advisory Board, and Faith Ambassador Council Meetings.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Applications</b>	Forms and materials submitted with application for positions or awards administered by Mayor's Office, including applications for scholarships, Promise partners, Mayor's Youth Advisory Council, volunteer positions, City commissions, and City committees or task forces.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Mayoral Memorandums</b>	Mayoral memos regarding proclamations, meetings, or events.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>News Releases</b>	A written or recorded record directed at members of the news media for the purpose of making a newsworthy announcement.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Proclamations</b>	Proclamations issued by the Mayor not read at City Council meetings.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Publications</b>	Informational or promotional publications of the Mayor's office, including newsletters, flyers, marketing materials, brochures, program materials.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Public Addresses</b>	Published records relating addresses, speeches or podcasts. May include script, video, PowerPoint, program, agenda, photos.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Special Projects</b>	Documents related to special or one-time projects.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>

## PARKS & RECREATION DEPARTMENT

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Agendas &amp; Minutes – Staff Meetings</b>	Agendas and minutes of monthly MPR all-staff meetings.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Agreements and Contracts</b>	Agreements signed by City staff (not by Council).	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy agreements expired or terminated on or before December 31, 2021</b>
<b>Camp Registration Records</b>	Records regarding camp registration.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1998</b>
<b>Concessionaires’ Health Department Records</b>	Central District Health food safety certifications and permits submitted by concessionaire.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Correspondence</b>	Correspondence created or received in the course of administering City policies, procedures or programs including but not limited to memos, transmittals, notes, comments, thank you notes, letters to businesses and day-to day office and housekeeping correspondence.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Committee Records</b>	Agendas, meeting minutes/notes, and audio recordings of ad hoc groups convened by Parks & Recreation for specific purposes (e.g., Christmas in Meridian).	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Employee files</b>	Certifications, disciplinary reports, performance evaluations, comment cards, complaints, kudos, awards, etc. regarding employees and lifeguards.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Transfer to HR: records dated on or before December 31, 2018</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>External Guidelines, Policies, Director's Orders</b>	Director's orders and policies pertaining to external customers, facilities, recreation classes, camps, special events, and sports (e.g., Lost & Found, Metal Detecting, Recreational Instructor Policy, Registrations & Refunds, Sports League Bylaws, Partnerships Between Private or Public Entities, Hot Air Balloons).	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Employee Time Logs and Reports</b>	Completed logs of employees' timesheets, tasks, and location; reports and analysis of related data.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Facility Improvement Plans</b>	Plans and specifications related to remodel and improvement of MPR buildings and facilities.	Semipermanent <i>IC § 50-907(2)(c)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Facility Reservations</b>	Materials related to reservation of facilities and equipment (e.g., shelters; tennis, pickleball, and basketball courts; multiuse and baseball/ softball fields; cornhole boards).	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1998</b>
<b>Financial Aid Applications</b>	Completed application forms and materials submitted to request financial assistance for children's class or program (e.g., Care Enough to Share).	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Grounds Maintenance Records</b>	Pesticide spray records, playground inspection records.	Temporary <i>IC § 50-907(3)(d)</i> IDAPA 02.03.03.100.05	<b>Destroy records dated on or before December 31, 2020</b>
<b>Homecourt Membership Records</b>	Records regarding Homecourt membership registration, including, e.g., waiver, financial information, daily sign-in logs.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Incident or Accident Reports</b>	Records regarding incidents, injuries, accidents, rescues, or other staff actions, incurred during or related to a department-sponsored or department-provided class, camp, program, reservation, or activity.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Memorial Forms</b>	Completed citizen forms requesting memorial in MPR facility under established memorial program (e.g. Generations Plaza Brick Sales form, Kleiner Park Memorial Tree Plaza Paver Sales, Memorial Tree Program form).	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1948</b>
<b>Meeting Records and Notes</b>	Agendas and minutes of monthly MPR all-staff meetings.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Permits</b>	Materials related to permit applications and permits issued by MPR (e.g., amplified sound permits, short-term concession permits).	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Recreation Class/ Activity Registration</b>	Materials related to registration for a recreation class or activity.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1998</b>
<b>Special Event Records</b>	Records related to MPR-sponsored special events, including vendor and sponsor contracts and entries, Trunk or Treat trunk entries, parade float entries.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1948</b>
<b>Payment Records</b>	Materials related to customer payment for MPR services e.g., special event applications, vendors, sponsors, registration, permit applications, memorials, sports league registration, recreation class registration, camp registration, swim lessons.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1998</b>
<b>Sports Schedules and Scores</b>	Records of games played and final scores.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records for which</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
			<b>administrative need has ended</b>
<b>Surveys</b>	Internal and external outreach surveys and results.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2013</b>
<b>Team Rosters and Registration Forms</b>	Record of all individuals registered for a sports team.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Time Capsule Content Information</b>	Records regarding location and contents of time capsules that have not been opened.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records related to time capsule opened on or before December 31, 2021</b>
<b>Tree Abatement Case Files</b>	Records related to nuisance tree abatement as ordered by City Arborist.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Lakeview Golf Course</b>			
<b>Golf Cart Maintenance Records</b>	Records regarding maintenance of golf carts.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Golf Course Annual Passes</b>	Records related to annual pass registration and issuance, including, e.g., waiver, contact and financial information.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Golf Course Fertilizer and Pesticide Records</b>	Pesticide, herbicide, and fertilizer spray records.	Temporary <i>IC § 50-907(3)(d)</i> IDAPA 02.03.03.100.05	<b>Destroy records dated on or before December 31, 2020</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>Golf Course Payment Records</b>	Materials related to customer accounts and payments for LGC goods and services.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1998</b>
<b>Tournament Applications</b>	Tournament application form and related materials, including waiver, proof of insurance, etc.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Community Swimming Pool</b>			
<b>Chemical Test Logs</b>	Records of water chemical level testing performed by pool staff.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Chemical Test reports</b>	Records of automatic chemical tests performed by chemical automation system and emailed to MPR staff.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Swim Team Waiver Forms</b>	Completed waivers submitted by individual swim team members.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Pool Operation License</b>	License(s) to operate pool issued by Central District Health.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Lifeguard Schedules and Timesheets</b>	Lifeguard schedule and timesheets, contact information.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1998</b>
<b>Arts and Culture Coordinator</b>			
<b>Initial Point Gallery Records</b>	Records regarding applicants not selected for exhibition of work in IPG.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
	Permission forms allowing display of work by minor artists in IPG.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
			<b>on or before December 31, 2021</b>
	IPG visitor sign-in sheets.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>

## POLICE DEPARTMENT

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Activity reports</b>	Daily, weekly, monthly or other reports documenting the activities of employees, including: type of activity, employees involved, time spent on activity, work completed, equipment used, etc. May include Education & Prevention Training reports.	Semipermanent <i>Idaho Code § 50-907(2)(e)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Code enforcement Incident Notes**</b> <b>2012-2019</b>	Records created by code enforcement officers to document a violation or investigation into a suspected violation of city ordinance in Accella.	Semi-permanent <i>Idaho Code § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1948</b>
<b>Code Enforcement Incident Notes**</b> <b>2020 – Present</b>	Records created by code enforcement officers to document a violation or investigation into a suspected violation of city ordinance that do not become a DR in case management module of ITS.	Semi-permanent <i>Idaho Code § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Crime analysis statistics</b>	Records documenting police efforts to anticipate, prevent, or monitor criminal activity. May include statistical summaries of crime patterns, modes of operation, analysis of particular crimes, criminal profiles, forecasts, movements of known offenders, etc.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>
<b>Crime reports (DRs) for Suicides, Unattended Deaths, and Major Crimes</b>  <b>(Including Homicide Offenses, Human Trafficking, Kidnapping/Abduction, Sex Offenses, and Terrorism)</b>	Reports documenting a suicide, unattended death and/or criminal offense and actions taken, including charges or arrests. Record typically includes location of occurrence, date and time, handling officer, involved parties (suspects, victims, witnesses, reporting parties, etc.) and their personal information, summary of events and supportive documents (e.g., <i>probable cause statements, witness statements, runaway forms, release of custody forms (juveniles), documents provided by citizens and victims, citations, property invoices, release of property forms, etc.</i> ). May include <i>polygraph records (e.g., pre-examination records, questions, statements of consent, analysis</i>	Semipermanent <i>IC § 50-907(2)(e)</i>	<b>Destroy records of prosecuted cases where final disposition was complete on or before December 31, 1923</b>  <b>Destroy records of non-prosecuted cases where last investigative action was on or before December 31, 1923</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
	<p><i>reports, results charts, conclusions, interviewee statements, related information); property and evidence control and disposition records (e.g., evidence photographs, receipt forms, evidence logs, property reports, destruction lists, property consignment sheets, seized firearm logs, homicide evidence inventories, etc.); and/or informant case files (reports, correspondence, payment records, fingerprint cards, signature cards, letters of understanding on informants' activities and related records).</i></p>		
<p><b>Crime Reports (DRs) for Group A Felony Offenses</b></p> <p><b>(Including Animal Cruelty, Arson, Assault Offenses, Bribery, Burglary/Breaking &amp; Entering, Commerce Violations, Counterfeiting/Forgery, Destruction/Damage/Vandalism of Property, Drug/Narcotic Offenses, Embezzlement, Espionage, Extortion/Blackmail, Fraud Offenses, Fugitive Offenses, Gambling, Immigration Violations, Larceny/Theft Offenses, Motor Vehicle Theft, Pornography/Obscene Material, Prostitution</b></p>	<p>Reports documenting a felony offense and actions taken, including charges or arrests. Record typically includes location of occurrence, date and time, handling officer, involved parties (suspects, victims, witnesses, reporting parties, etc.) and their personal information, summary of events and supportive documents (e.g., <i>probable cause statements, witness statements, tow slips, administrative license suspension forms, intoxilyzer slips, field sobriety tests forms, runaway forms, release of custody forms (juveniles), criminal background information (ILETS/Triple III, Ada LE Lookup, ISTARs, JDOC), documents provided by citizens and victims, citations, property invoices, release of property forms, Leads Online printouts, shoplifting reports from store security officers, etc.</i>). May include polygraph records (pre-examination records, questions, statements of consent, analysis reports, results charts, conclusions, interviewee statements, related information), abandoned vehicle reports, found property records, traffic collision reports, property and evidence control and disposition</p>	<p>Semipermanent IC § 50-907(2)(g)</p>	<p><b>Destroy records related to prosecuted cases where final disposition is dated on or before December 31, 2013</b></p> <p><b>Destroy records related to non-prosecuted cases where last investigative action is on or before December 31, 2013</b></p>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
<b>Offenses, Robbery, Stolen Property Offenses, Treason, and Weapon Law Violations)</b>	<i>records (e.g., evidence photographs, receipt forms, evidence logs, property reports, destruction lists, property consignment sheets, seized firearm logs, homicide evidence inventories, etc.), and/or informant case files (reports, correspondence, payment records, fingerprint cards, signature cards, letters of understanding on informants' activities and related records).</i>		
<b>Crime reports (DRs) for Group A Misdemeanor Offenses and Group B Offenses (Including Bad Checks, Bond Default, Curfew/Loitering/Vagrancy Violations, Disorderly Conduct, Driving Under the Influence, Drunkenness, Family Offenses Nonviolent, Federal Resource Violation, Liquor Law Violations, Peeping Tom, Perjury, Trespass of Real Property, All Other Offenses)</b>  <b>Code enforcement offences (eg. UDC, nuisance, parking, vehicle impound)</b>	<p>Reports documenting a criminal offense and actions taken, including charges or arrests. Record typically includes location of occurrence, date and time, handling officer, involved parties (suspects, victims, witnesses, reporting parties, etc.) and their personal information, summary of events and supportive documents (e.g., <i>probable cause statements, witness statements, tow slips, administrative license suspension forms, intoxilyzer slips, field sobriety tests forms, runaway forms, release of custody forms (juveniles), criminal background information (ILETS/Triple III, Ada LE Lookup, ISTARs, JDOC), documents provided by citizens and victims, citations, property invoices, release of property forms, Leads Online printouts, shoplifting reports from store security officers, etc.</i>). May include <i>polygraph records (pre-examination records, questions, statements of consent, analysis reports, results charts, conclusions, interviewee statements, related information), abandoned vehicle reports, found property records, traffic collision reports, property and evidence control and disposition records (e.g., evidence photographs, receipt forms, evidence logs, property reports, destruction lists, property consignment sheets, seized firearm</i></p>	Semipermanent  <i>IC § 50-907(2)(g)</i>	<b>Destroy records related to prosecuted cases where final disposition is dated on or before December 31, 2018</b>  <b>Destroy records related to non-prosecuted cases where last investigative action is on or before December 31, 2018</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
	logs, homicide evidence inventories, etc.), and/or informant case files (reports, correspondence, payment records, fingerprint cards, signature cards, letters of understanding on informants' activities and related records).		
<b>Citations (Misdemeanor and Infraction) for Other Crimes</b>	Police department copy of citations issued for traffic violations not associated with a crime report. Record typically includes date and time, location of offense, vehicle license plate information, code violation number, and issuing officer.	Temporary <i>IC § 50-907(3)(d)</i>	<b>Destroy records dated on or before December 31, 2021</b>
<b>Digital media – Type 1 (Associated with Major Crimes Reports, Unattended Deaths, and Suicides)</b>	Digital media attached to a crime report for a major crime. Includes video, audio, or other digital content created by a law enforcement officer in the course of an investigation or response and attached to a crime report for Major crimes including Homicide Offenses, Human Trafficking, Kidnapping/Abduction, Sex Offenses, and Terrorism	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records related to prosecuted cases where final disposition is dated on or before December 31, 1923</b>  <b>Destroy records related to non-prosecuted cases where last investigative action is on or before December 31, 1923</b>
<b>Digital media – Type 2 (Associated with Group A and B Reports)</b>	Digital media attached to a crime report other than a major crime. Includes video, audio, or other digital content created by a law enforcement officer in the course of an investigation or response and attached to a crime report for a crime other than a major crime.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Group A Cases:</b>  <b>Destroy records related to prosecuted cases where final disposition is dated on or before December 31, 2013</b>  <b>Destroy records related to non-prosecuted cases where last investigative action is on or before December 31, 2013</b>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
			<p><b>Group B Cases:</b></p> <p><b>Destroy records related to prosecuted cases where final disposition is dated on or before December 31, 2018</b></p> <p><b>Destroy records related to non-prosecuted cases where last investigative action is on or before December 31, 2018</b></p>
<p><b>Digital media – Type 5*</b></p>	<p>Digital media related to an officer complaint. Includes video, audio, or other digital content created by a law enforcement officer in the course of an investigation or response relevant to a complaint about such response or officer.</p> <p>* Where record is embedded with a crime report (DR), it shall be retained according to the retention period established for the crime report.</p>	<p>Temporary <i>IC § 50-907(3)(d)</i></p>	<p><b>Destroy records dated on or before December 31, 2021</b></p>
<p><b>Field interview reports (FI cards)</b></p>	<p>An informational document written by police officers relating to individuals, events, or vehicles for which the officer does not have probable cause for enforcement. Typically includes name and current address of person contacted, physical description of person or vehicle, officer’s name, location of contact, date and time, reason for contact, etc.</p>	<p>Semipermanent <i>IC § 50-907(2)(g)</i></p>	<p><b>Destroy records dated on or before December 31, 2018</b></p>
<p><b>Grant records</b></p>	<p>Applications and required reporting documents for grants to support law enforcement initiatives and programming (e.g., crime prevention, substance abuse programs, criminal justice, SWAT).</p>	<p>Semipermanent Idaho Code § 50-907(2)(g)</p>	<p><b>Destroy records of grants closed out on or before December 31, 2013</b></p>
<p><b>Health &amp; Welfare Referrals APS &amp; Daycare complaints</b></p>	<p>Referrals of suspected child abuse, adult abuse and daycare complaints.</p>	<p>Semipermanent <i>IC § 50-907(2)(g)</i></p>	<p><b>Destroy records related to cases closed or referred on</b></p>

RECORD	DESCRIPTION	CATEGORY	RETENTION PERIOD
			<b>or before December 31, 2018</b>
<b>Internal affairs files</b>	Records documenting department's investigation of an officer's role in an incident for the purpose of evaluating compliance with department policy and professional standards. Records typically include investigative materials (video and audio recordings, written statements, narratives, analysis), <i>polygraph records (pre-examination records, questions, statements of consent, analysis reports, results charts, conclusions, interviewee statements, related information)</i> , and recommended disciplinary actions, if any.	Semipermanent <i>IC §§ 50-907(2)(g) and 45-610; 29 CFR 1627.3; 29 CFR 1602.31</i>	<b>Destroy records related to employees who have separated and completed any related litigation on or before December 31, 1948</b>
<b>Intoxilyzer 5000en, Draeger 9510 and LifeLoc instrument records</b>	Factory and State of Idaho certificates for instrument; log of each person that takes the breathalyzer test and verification testing. May include suspect name, date, time, results, operator name, calibration check results, simulated temperature in range, comments, etc.	Temporary <i>IC § 50-907(3)(d) and IDAPA 11.03.01.013.06</i>	<b>Destroy records related to machines with certificates issued on or before December 31, 2020</b>
<b>Master name index records</b>	Information on individuals who are field interviewed, individuals who are arrested, suspects or accomplices in crimes, victims, complainants, and witnesses to incidents. Information typically includes name, address, date of birth, race, sex, date and time of incident or contact, case number (DR#), citation numbers and other identifying data.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 1923</b>
<b>Public records requests of records associated to a Major Crime DR</b>	Written public records requests, responses, records provided, and original (unredacted) records pertaining to a crime DR that falls under the Category of Crime reports (DRs) for Suicides, Unattended Deaths, and Major Crimes (murder, involuntary manslaughter, rape, sexual abuse of a child, terrorism).	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>See destruction order for the original crime DR</b>
<b>Radar equipment, certifications, and</b>	Records documenting the calibration and maintenance of radar equipment	Temporary	<b>Destroy records dated on or before</b>

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>maintenance records</b>	that may be useful in documenting the accuracy of the readings. Often includes original factory certification of calibration. Information relating to maintenance and repair may include a description of the work completed, parts used, date of service, equipment number, make, model, etc.	<i>IC § 50-907(3)(d)</i>	<b>December 31, 2020 after equipment retirement</b>
<b>Training materials</b>	Records related to training programs provided to MPD personnel by presenters including City employees, contractors, or other presenters. May include course descriptions, instructor certifications, instructional materials, course outlines and handouts, and attendance records.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records related to a presentation or last use of records dated on or before December 31, 2018</b>
<b>Victim Witness System</b>	Notations and documents documenting contact with victims and witnesses.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records related to cases in which investigation was closed or case was disposed before December 31, 2003</b>
<b>Written warnings</b>	Written notice provided by MPD officer to member of the public to bring attention to a potential or actual violation.	Semipermanent <i>IC § 50-907(2)(g)</i>	<b>Destroy records dated on or before December 31, 2018</b>

\* **Note:** Where record is used for legal, training, or purposes other than those enumerated in retention period, that record shall be retained according to the retention period established for other records similarly used.

\*\* **Note:** Where record is embedded with a crime report (DR), it shall be retained according to the retention period established for the crime report.

**PUBLIC WORKS DEPARTMENT**

<b>RECORD</b>	<b>DESCRIPTION</b>	<b>CATEGORY</b>	<b>RETENTION PERIOD</b>
<b>All Department Records</b>			
<b>Alarm Monitoring / Test Results Reports</b>	Reports of monitoring fire alarms, security alarms and sprinkler tests for all relevant City-owned facilities including annual fire alarm testing, annual backflow testing, quarterly sprinkler testing in Sapphire suppression system, monthly fire pump runs, and monthly check on fire extinguishers and Sapphire.	Semipermanent	<b>Destroy records for which there is no further administrative need dated on or before December 31, 2018</b>
<b>Budget Preparation Records</b>	Work documents utilized to build base budgets and establish yearly budgets, including vehicle replacement worksheets, enhancements, amendments and carry forward support.	Semipermanent	<b>Destroy records dated on or before December 31, 2003</b>
<b>Confined Space Entry Permit</b>	A written authorization prepared prior to employee entry into a Permit Required Confined Space. The Department's permit contains specific entry space, purpose and time conditions under which the entrance will operate.	Semipermanent	<b>Destroy records dated on or before December 31, 2018 from date issued</b>
<b>Correspondence, Administrative</b>	Correspondence created or received in the course of administering City policies, procedures, or programs.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Departmental Reports</b>	Department reports, performance management presentations.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Engineering Capital and Enhancement Plan (ECEP) Reports</b>	Engineering Capital & Enhancement Plan (ECEP) – 5-year Capital Improvement Plan Reports.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Meeting Minutes</b>	Internal meeting agendas, minutes, sign-in sheets	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Photos, Building Maintenance</b>	Photos relating to repair and replacement of City-owned equipment, material, and facilities.	Semipermanent	<b>Destroy records requiring engineering stamps on or before December 31, 2021 after life of structure. Destroy all other records dated on or before December 31, 2013</b>

<b>Presentations</b>	Departmental presentations.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Safety Audits</b>	Health and Safety audits.	Temporary	<b>Destroy records dated on or before December 31, 2020</b>
<b>Safety/Health and Testing</b>	Safety and health documents including but not limited to training, auditory testing records, respirator fit test information.	Semipermanent	<b>Destroy records dated on or before December 31, 1948</b>
<b>Safety Meeting Agenda/Signup Sheets</b>	Topics covered and sign-up sheet for employees who attended the meetings.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Training and Travel</b>	Records documenting attendance and presentation by City employees at conventions, conferences, seminars, workshops, and similar training events. Includes training requests, travel requests, training and Continuing Education Unit (CEU) tracking reports, and related correspondence.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Administration</b>			
<b>Area of Impact Records</b>	Records related to analysis of expansion of Public Works services into the Area of Impact such as those for Kuna, Kuna Treatment Plant, Meridian Heights Water and Sewer District, South Meridian Planning.	Semipermanent	<b>Destroy records dated on or before December 31, 1948</b>
<b>Committee Records</b>	Agendas and meeting minutes for special groups convened by Public Works such as City Services Focus Group, Construction Best Management Practices Sub-Committee, Energy.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Emergency Master Plans</b>	Emergency plan records for City Hall, Emergency Management, and Continuity of Operations.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Events, Public Works</b>	Records related to planning Public Works internal and external events.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Rate/Fee Records</b>	Records related to establishing utility rates and fees, including calculations, research and recommendations.	Semipermanent	<b>Destroy records dated on or before December 31, 2003</b>

<b>Special Projects</b>	Documents related to special or one-time projects to include, but not limited to: Strategic Plans, Inventory Management, Project Information, Rail with Trail, Subdivisions, and Accreditation.	Semipermanent	<b>Destroy records dated on or before December 31, 2013 after completion</b>
<b>Surveys</b>	Public Works initiated internal and external surveys and survey results.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>

<b>Engineering</b>			
<b>Fire Flow Requests</b>	Requests from customers for fire flow and responses from Engineering staff based on computer modeling.	Semipermanent	<b>Destroy records dated on or before December 31, 1948</b>
<b>Sewer Modeling Requests</b>	Requests from customers to run sewer model for capacity and sizing and response from Engineering staff based on computer modeling.	Semipermanent	<b>Destroy records dated on or before December 31, 1948</b>
<b>Environmental</b>			
<b>Environmental Awards Records</b>	Awards presented to citizens and businesses in recognition of environmental contributions to the community. This includes but is not limited to award nominations, certificates, photographs, and lists of recipients.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Pretreatment</b>			
<b>Industrial Pretreatment</b>	Records related to the identification, inspections sampling, permitting, formalized agreements and/or contracts between the City and individual facilities within the business and industrial sectors that must comply with the federal requirements of the Environmental Protection Agency 40 CFR Part 403, General Pretreatment regulations. These records and supporting documentation typically include: Industrial waste questionnaires, permit applications, permits and fact sheets, inspection reports, Industrial user reports, monitoring data (including laboratory reports), required plans (e.g., slug control, sludge management, pollution prevention), enforcement activities, and correspondence to and from the Industrial User.	Semipermanent	<b>Destroy all records dated on or before December 31, 2018 (unless IPDES permit cycle is not concluded or state or federal agency has requested retention)</b>
<b>Permitted Facilities</b>	Records related to permitted facilities, including zero discharge permits	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>

<b>Photos, Industrial Pretreatment</b>	Photos related to the identification, inspections sampling, permitting, formalized agreements and/or contracts between the City and individual facilities within the business and industrial sectors that must comply with the federal requirements of the Environmental Protection Agency 40 CFR Part 403, General Pretreatment regulations.	Semipermanent	<b>Destroy all records dated on or before December 31, 2018 (unless IPDES permit cycle is not concluded or state or federal agency has requested retention)</b>
<b>Pretreatment Awards Records</b>	Awards presented to businesses in recognition of Best Management Practices (BMP) contributions to the Wastewater Resource Recovery Facility. This includes but is not limited to award nominations, certificates, photographs, and lists of recipients.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Wastewater</b>			
<b>Air Permit</b>	All documents and reports related to the Air Permit. Can include reports, manuals, data, and calibration information.	Semipermanent	<b>Destroy records related to monitoring samples taken, measurements taken, reports or applications prepared, or permits expired on or before December 31, 2018</b>
<b>Biosolids</b>	All documents and reports related to biosolids production and disposal. Can include Sewer Sludge Application Site Logs and Sewage Sludge Management Plans.	Semipermanent	<b>Destroy all records dated on or before December 31, 2018 (unless IPDES permit cycle is not concluded or state or federal agency has requested retention)</b>  <b>Destroy discharge monitoring reports related to permits that expired on or before December 31, 2003</b>
<b>Discharge Monitoring Records</b>	Records documenting effluent quality discharged from the City wastewater treatment facility. Includes permit required supporting documentation.	Semipermanent	<b>Destroy discharge monitoring reports related to permits that expired on or before December 31, 2003</b>  <b>Destroy all other records dated on or before</b>

			<b>December 31, 2018 (unless IPDES permit cycle is not concluded or state or federal agency has requested retention)</b>
<b>75 Equipment Maintenance &amp; Calibration Records</b>	Records documenting the maintenance and calibration of equipment and instruments used to undertake and monitor wastewater treatment operations. Useful to verify equipment reliability and for reference by regulatory agencies. Information includes: date, type of equipment maintained or calibrated, tests performed, repairs needed, comments, and related information.	Semipermanent	<b>Destroy records dated on or before December 31, 2018 after equipment removed from service, at end of the IPDES permit cycle, or as requested by state or federal agencies, or the life of City Database, whichever is longer.</b>
<b>Idaho Pollutant Discharge Elimination System (IPDES) Records</b>	Records documenting the application for and issuance of a permit to the City under the Idaho Pollutant Discharge Elimination System (IPDES) program which allows discharge of specific pollutants under controlled conditions. Records typically include: applications, permits, addenda, modifications, and related supporting documentation. Information includes: influent and effluent limits, chemical analysis records, water flow, test and recording requirements, definitions and acronyms, compliance schedules, and related data.	Semipermanent 40 CFR 122.41	<b>Destroy records dated on or before December 31, 2018 at end of the IPDES permit cycle, or as requested by state or federal agencies, whichever is longer.</b>
Reclaimed Water Records (REUSE)	Includes all records related to the reclaimed water permit. Can include permits, permit applications, manuals, plans, agreements, data and reports.	Semipermanent	<b>Destroy records related to permits that expired before December 31, 2021 (unless state or federal agency has requested retention)</b>
<b>Sewer Maintenance and Repair Records</b>	Records documenting the maintenance and repair of City sewers. May include summaries, reports, and similar records usually compiled from daily work records on a monthly or quarterly basis.	Semipermanent	<b>Keep records requiring engineering stamps Destroy records dated on or before December 31, 2021 after life of structure. Destroy all other records dated on or before December 31, 2018</b>

			<b>or until asset is removed from service or the administrative need ends.</b>
<b>Sewer Smoke Test Records</b>	Records documenting smoke tests undertaken to verify hookup to main sewer lines, check condition of pipes, or determine effectiveness of backflow prevention devices. Information typically includes: maps or diagrams of lines tested, location of leaks detected, inspector's name, pipe size, and related information.	Semipermanent	<b>Destroy records dated on or before December 31, 2013</b>
<b>Sewer Television/ Videoscan Inspection Records (External)</b>	Records from contractors documenting television inspections used to locate problems and defects in sewer lines. Often consists of , inspections of newly constructed lines.	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Valve Maintenance Records</b>	Records documenting the location, specifications, maintenance, and repair of valves in the City sewer system. Includes lists, charts, drawings, reports, logs, and related records, valve location, identification number, run of pipe, size, make, year installed, depth, turns to open and normal position, narratives of valve maintenance and repair, test run, personnel completing work, dates, and related information.	Semipermanent	<b>Keep records requiring engineering stamps dated on or before December 31, 2021 after life of structure. Keep other records dated on or before December 31, 2018 or until asset is removed from service or the administrative need ends.</b>
<b>Wastewater Customer Complaint Records</b>	Complaint letters, notes, or phone calls and in-person complaints from customers or citizens	Semipermanent	<b>Destroy records dated on or before December 31, 2018, at end of the IPDES permit cycle, or as requested by state or federal agencies, whichever is longer.</b>
<b>Wastewater Preventative Maintenance Work Plan Records</b>	Preventative maintenance schedules, work orders	Semipermanent	<b>Destroy records dated on or before December 31, 2018 or until the asset is removed from service or until the period of reclaimed water permit plus two years, at end of the IPDES Permit cycle, or as requested by state or federal agencies, or the</b>

			<b>life of City Database, whichever is longer.</b>
<b>Water</b>			
<b>Backflow Tests</b>	Backflow assemblies test report	Temporary	<b>Destroy records dated on or before December 31, 2020</b>
<b>Construction Samples</b>	Bacteria sample results taken for water line/well construction	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Daily Chlorine Residuals</b>	Field notes from Chlorine residuals taken from various sample ports in the City water system	Temporary	<b>Destroy records dated on or before December 31, 2021</b>
<b>Digline Marking Agreement</b>	Agreements between City and Excavators for marking facility	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Fire Flow Reports</b>	Actual fire flow data taken from a particular fire hydrant	Semipermanent	<b>Destroy records dated on or before December 31, 1948</b>
<b>ISO Fire Hydrant Reports</b>	Updates to our Insurance Evaluator notifying them of new hydrants to Water System	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Leak Letters</b>	Letters that are mailed to customer informing customer of a possible leak are attached to the service order for leak check	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Meter Warranty Report</b>	A report on meter warranty	Semipermanent	<b>Destroy records dated on or before December 31, 1998</b>
<b>Safety Inspections</b>	Inspections / Reports for Gas Monitors, Crane, Fall Protection, and Fire Inspection	Semipermanent	<b>Destroy records dated on or before December 31, 1993</b>
<b>Spring flush notices (Mailers)</b>	Flush notices mailed to customers for spring flush of water system / Maps	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>
<b>Turbidity Reports</b>	Logs used for entering wasted water flushed from the water system and not sold. Flush locations are listed. Water Quality information, including Nephelometer Turbidity (NTU) readings, are documented.	Semipermanent	<b>Destroy records dated on or before December 31, 1998</b>
<b>Water Meter Reports</b>	Water meter reports including NC list, billing status report, autoread master route report, billing pre-scan report, re-reads, and water meter testing results, Sensus analytics, RNI Reports	Semipermanent	<b>Destroy records dated on or before December 31, 2018</b>

<b>Water Quality Correspondence</b>	Any mailed correspondence with labs, customers, regulators concerning sampling	Semipermanent	<b>Destroy records dated on or before December 31, 2008</b>
<b>Water Quality Master Log</b>	Records documenting water quality calls from customers	Semipermanent	<b>Destroy records dated on or before December 31, 1998</b>