



City of San Jose Records Retention Schedule

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Airport

| | | Series # | Title and Description | Retention |
|---|------------------------------------|----------|--|--|
| Finance and Administration | | | | |
| Airport | Finance and Administration | 1150 | PROPERTY AND LIABILITY INSURANCE RECORDS - Certificates of insurance. | Term of contract + 5 years |
| Airport | Finance and Administration | 1151 | RATES AND CHARGES - Records documenting the rates and charges to airlines using the Airport and their formulation. | 5 years |
| Airport | Finance and Administration | 1152 | SECURITY DEPOSIT RECORDS - Records documenting the receipt, return, or forfeiture of security deposits from and by Airport tenants. | Return/forfeiture + 4 years |
| Airport | Finance and Administration | 1153 | AIRPORT BOND RECORDS - Records documenting the issuance and management of Airport bonds, of which the copy of record is NOT maintained by the Finance Department. | Term of bond + 6 Years; If bond is refunded, the is extended to the term of the refunding. |
| Airport | Finance and Administration | 1154 | AIRPORT ACTIVITY STATISTICS - Data on airport traffic and other activities used for reporting purposes. | Minimum 2 Years or no longer useful for reference, whichever is longer. |
| Airport | Finance and Administration | 1174 | PROJECT COSTS PASSENGER FACILITY CHARGE (PFC) FUNDED PROJECTS - Records documenting the use of PFC revenues for various airport projects. | 3 Years |
| Facilities and Engineering | | | | |
| Airport | Facilities and Engineering | 1155 | AIRPORT FACILITY WORK ORDERS AND RESPONSES - Records documenting requests for facility repairs and the responses thereof. | 2 years |
| Government and Legislative Affairs | | | | |
| Airport | Government and Legislative Affairs | 1156 | INTERGOVERNMENTAL RELATIONS PROGRAM RECORDS - Records documenting the management of the City's Intergovernmental Relations program, including but not limited to copies of bills and legislation and associated documents, correspondence, emails, reference materials, reports, notes, and memoranda. | 2 Years |

Operations

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|---------|------------|------|---|--|
| Airport | Operations | 1157 | GATE MANAGEMENT RECORDS - Records documenting the management of airport aircraft gates. | 2 Years |
| Airport | Operations | 1158 | AIRCRAFT INCIDENT RECORDS - Records documenting accidents and other incidents involving aircraft arriving, departing, or present at the airport including but not limited to reports and communications. | 5 Years |
| Airport | Operations | 1159 | PARKING AND GROUND TRANSPORTATION PERMIT RECORDS - Records documenting the issuance, renewal, and termination of permits for airport parking and for companies providing airport ground transportation. For contracts with ground transport companies, see Citywide General Schedule series #168. | Life of permit + 2 years |
| Airport | Operations | 1160 | SECURITY COMPLIANCE RECORDS - Records documenting compliance with Transportation Security Administration requirements, including but not limited to badging, finger print cards, employee history verification, policies, procedures, staff training, tenant security programs, law enforcement responses, security contingency plans, | Until obsolete or superseded or 2 years whichever is longer. |
| Airport | Operations | 1161 | AIRPORT IMPROVEMENT PROJECT MANAGEMENT RECORDS - Records documenting activities associated with airfield and facility projects which are NOT convenience copies of records of which the official version is retained elsewhere, including but not limited to correspondence, memoranda, plans, drawings, analyses, and reports, but excluding any records needed to document contract compliance or performance, or architectural/engineering design and construction (see Citywide General Schedule series 168 and 169). Also includes any records related to AIP Grant funded projects. | End of project + 3 years |
| Airport | Operations | 1162 | AIRPORT TENANT INSURANCE CERTIFICATES - Records documenting that airport tenants have required insurance covered. | Term of contract + 5 years |
| Airport | Operations | 1163 | AIRPORT OPERATION CERTIFICATION RECORDS - Records documenting the certification of the Airport by the Federal Aviation Administration including but not limited to Operating Certificate, Application for Certification, FAA inspection reports relating to certification, and certification manual and updates. | As long as certification is active + 2 years. |

City of San Jose Records Retention Schedule

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|---------|------------|------|--|---------|
| Airport | Operations | 1164 | SELF INSPECTION AND AIRPORT CONDITION RECORDS - Records documenting inspection of airport facilities and monitoring of airport conditions according to FAA requirements. | 2 years |
| Airport | Operations | 1165 | AIRPORT NOISE MONITORING AND ABATEMENT RECORDS - Records documenting efforts to monitor aircraft noise and its impacts on the surrounding communities. Includes but is not limited to logs, correspondence, reports, and complaints. | 3 Years |
| Airport | Operations | 1166 | EMERGENCY PLAN EXERCISE RECORDS - Records documenting the holding of emergency plan exercises required by the FAA. | 3 years |

Planning and Development

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|---------|--------------------------|------|--|--------------------------|
| Airport | Planning and Development | 1167 | AIRPORT MASTER PLAN - Planning document developed to guide the Airport Improvement Program and approved by the Federal Aviation Administration, including updates. | PERMANENT |
| Airport | Planning and Development | 1168 | AIRPORT LAYOUT PLAN - Plan required by the FAA depicting the physical layout of the Airport, including updates. | PERMANENT |
| Airport | Planning and Development | 1169 | PLANNING PROJECT RECORDS - Records documenting various airport planning projects, including but no limited to research, notes, correspondence, schedules, calculations, and reports. | End of project + 2 years |
| Airport | Planning and Development | 1170 | FEDERAL AVIATION ADMINISTRATION COMPLIANCE COMMUNICATIONS - Records documenting communications with the FAA not covered by other records series including but not limited to correspondence, reports, and responses to findings. | 2 years |
| Airport | Planning and Development | 1171 | AIRPORT MASTER PLAN DEVELOPMENT AND UPDATE RECORDS - Records created in the process of developing, updating, and maintaining the Airport Master Plan. | 2 years |
| Airport | Planning and Development | 1172 | NATIONAL POLLUTION DISCHARGE ELIMINATION SYSTEM (NPDES) PERMIT - Permit providing permission for non-point stormwater discharges. | PERMANENT |

Technology Services

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|---------|---------------------|------|--|---|
| Airport | Technology Services | 1173 | INFORMATION TECHNOLOGY MANAGEMENT RECORDS - Records documenting the management of departmental information technology. | Retain in accordance with IT Department retention schedule. |
|---------|---------------------|------|--|---|

City Attorney

| | | Series # | Title and Description | Retention |
|---------------------------------|--------------------------|----------|--|---|
| Administrative Services | | | | |
| City Attorney | Administrative Services | 1 | PUBLIC RECORDS REQUESTS FOR INFORMATION | 2 Years |
| City Attorney | Administrative Services | 2 | COUNCIL CLOSED SESSION FILES - Minutes, Agendas and Brown Act Documents | PERMANENT |
| City Attorney | Administrative Services | 3 | STATISTICAL REPORTING | 10 Years |
| City Attorney | Administrative Services | 4 | IMANAGE - Database for Document Tracking | Indefinite |
| Claims and Investigation | | | | |
| City Attorney | Claims and Investigation | 5 | LITIGATED INVESTIGATION FILES - Includes all Pre-Litigation Claim / Investigation Files, Surveillance Records | Destroy Same Time as Litigation Case File |
| City Attorney | Claims and Investigation | 6 | NON-LITIGATED INVESTIGATION FILES - Potential Claim Files, Civil Claims Files Not Resulting in Litigation, Any Other Investigation Records not Resulting in Litigation, Surveillance Records | Closure+2 Years with Review |
| City Attorney | Claims and Investigation | 7 | CLAIMS DATABASE - Information Stored on Database for Managing Claims Files | PERMANENT |
| Departments | | | | |
| City Attorney | Departments | 8 | LEGAL OPINIONS / MEMORANDA | 2 Years+While Useful |
| City Attorney | Departments | 9 | FORMAL WRITTEN CORRESPONDENCE - Including Notes and Research | 2 Years+While Useful |
| Litigation | | | | |
| City Attorney | Litigation | 10 | CRIMINAL MUNICIPAL CODE VIOLATIONS | Closure+10 Years |
| City Attorney | Litigation | 11 | LABOR GRIEVANCES - Labor Arbitration, All Other Cases Related to MOUs | Closure+10 Years |

City of San Jose Records Retention Schedule

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|---------------|------------|----|---|-------------------------------|
| City Attorney | Litigation | 12 | REAL PROPERTY - Eminent Domain, Inverse Condemnation, Land Use, Annexations, Tax Liens, Assessment Districts | PERMANENT |
| City Attorney | Litigation | 13 | CASE FILES - Torts, Property Damage, Code Enforcement, Collections, Breach of Contract, Petitions and Writs (Non-Land Use), Nuisance Abatement, Civil & Administrative Municipal Code Violations, Any Litigation Case File Not Under Another Category | Closure+10 Years |
| City Attorney | Litigation | 14 | CASE FILES - Pitchess Motions, Abatement Warrants, Disposition of Weapons, Bankruptcy, AIDs Testing, SDTs | Closure+5 Years |
| City Attorney | Litigation | 15 | CASE FILES - Employee Disciplinary, Writ of Garnishment | Closure+7 Years |
| City Attorney | Litigation | 16 | CASE FILES - Joinders | Closure+35 Years |
| City Attorney | Litigation | 17 | CASE FILES - Workers' Compensation Cases Closed by Stipulation, Surveillance Records | Closure+5 Years |
| City Attorney | Litigation | 18 | CASE FILES - Workers' Compensation Cases Closed by Compromise and Release, Surveillance Records | Closure+2 Years |
| City Attorney | Litigation | 19 | INDEX CARDS - Open/Closed Workers' Compensation Case Files | PERMANENT |
| City Attorney | Litigation | 20 | INDEX CARD HISTORY - Closed Cases | PERMANENT |
| City Attorney | Litigation | 21 | SETTLEMENT AGREEMENTS - Final Settlement Agreement Managed as a separate record | Fulfillment of Terms+10 Years |
| City Attorney | Litigation | 22 | DATABASE - Tracking of Litigation Cases both Opened and Closed, Summation | PERMANENT |

City Auditor

| | Series # | Title and Description | Retention |
|--------------|----------|---|------------------------------|
| ALL | | | |
| City Auditor | ALL | 23 AUDITS, FINAL REPORTS | PERMANENT |
| City Auditor | ALL | 24 AUDITS, WORKING FILES - Work Plans, Assignment Sheets | Completed Audit+10 Years |
| City Auditor | ALL | 25 MONTHLY AUDITOR REPORTS | 10 Years |
| City Auditor | ALL | 26 DEPARTMENT FILES - Files Created for Each Department to Address Issues and Projects Specific to a Business Function and/or Operations of a Department | Close of Issue+10 Years |
| City Auditor | ALL | 27 SPECIAL STUDIES - Proposal to Sell/Lease Municipal Water System, Review of Casino/Card Room Audits, Quarterly Follow-Up of Audit Recommendations, Other Studies as Requested | Completion of Study+10 Years |
| City Auditor | ALL | 28 SALES AND USE TAX AUDITS - Supporting Material, Final Reports | Completion of Audit+6 Years |
| City Auditor | ALL | 29 BUSINESS LICENSE AUDITS - Supporting Material, Final Reports | Completion of Audit+6 Years |
| City Auditor | ALL | 30 EQUIPMENT INVENTORY FILES - Annual Inventory of Computer Equipment | 2 Years |

City Clerk

| | | Series # | Title and Description | Retention |
|-------------------|------------|----------|--|--|
| Disclosure | | | | |
| City Clerk | Disclosure | 800 | COUNCIL MEMBER DISCLOSURE RECORDS - Forms disclosing various information filed by Council Members in accordance with SJMC 12 et seq or by Council direction, excluding Campaign Statements. | 4 Years |
| City Clerk | Disclosure | 801 | STATEMENTS OF ECONOMIC INTEREST (FORM 700) - Forms disclosing financial income and assets of all individuals required to file including but not limited to candidates, officials, members of boards and commissions, and designated employees and contractors. | 7 Years |
| City Clerk | Disclosure | 802 | LOBBYIST REGISTRATION AND REPORT RECORDS - Documents filed by lobbyists with the City Clerk as required by SJMC 12.12.400 et seq. | 5 Years |
| Elections | | | | |
| City Clerk | Elections | 803 | NOMINATION PAPERS AND SIGNATURES IN LIEU OF FEES - Original records of nominations of candidates for City office including both elected and unsuccessful candidates. | Term of Office for Which Filed + 4 Years |
| City Clerk | Elections | 804 | ELECTED CANDIDATE CAMPAIGN STATEMENTS - Original campaign statements filed by or in support of candidates for City office who are successful in their candidacies. | Indefinite |
| City Clerk | Elections | 805 | UNSUCCESSFUL CANDIDATE CAMPAIGN STATEMENTS - Original campaign statements filed by or in support of candidates for City office who are unsuccessful in their candidacies. | 7 Years |
| City Clerk | Elections | 806 | LOCAL BALLOT MEASURE CAMPAIGN STATEMENTS - Original campaign statements filed by local primarily formed ballot measure committees. | 7 Years |

City of San Jose Records Retention Schedule

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| City Clerk | Elections | 807 | OTHER BALLOT MEASURE CAMPAIGN STATEMENTS - Copies of campaign statements filed by committees not specified in other series of campaign statements, including but not limited to General Purpose Recipient Committees, Major Donor Committees and Independent Expenditure Committees. | 7 Years |
| City Clerk | Elections | 808 | PETITIONS - Petitions to initiate proceedings for initiatives, referendums, charter amendments, and recalls. | 8 months |
| City Clerk | Elections | 809 | ELECTION RESULTS, REPORTS, AND CERTIFICATES - Includes City Clerk's "Green Book" summary of election results, 1887-present. | PERMANENT |
| City Clerk | Elections | 824 | BOARD AND COMMISSION NOMINATION ELECTIONS - Materials used to conduct elections among City employees and retirees to nominate candidates for appointment by City Council to City retirement boards and the Civil Service Commission under City Charter Section 1001(b), SJMC 2.08.1070, and SJMC 2.08.1245. | 6 Months |

Legislative

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|------------|-------------|-----|---|-----------|
| City Clerk | Legislative | 529 | STANDING COUNCIL COMMITTEE MEETING RECORDS - Minutes and other meeting related records of Council standing committees excluding drafts, convenience copies, and documents covered by other retention schedules. | PERMANENT |
| City Clerk | Legislative | 810 | CITY COUNCIL MEETING PRIMARY RECORDS - Minutes, ordinances, resolutions, and other records documenting the meetings of the City Council excluding drafts, convenience copies, and documents covered by other retention schedules. | PERMANENT |
| City Clerk | Legislative | 811 | CITY COUNCIL MEETING ANCILLARY RECORDS - Supporting records for Council meetings including but not limited to presentations, notices, affidavits, request to speak cards, and working files. | 2 Years |
| City Clerk | Legislative | 813 | RULES AND OPEN GOVERNMENT COMMITTEE MEETING ANCILLARY RECORDS - Supporting records for committee meetings including but not limited to presentations, notices, affidavits, and working files. | 2 Years |

City of San Jose Records Retention Schedule

Recordkeeping

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|------------|---------------|-----|---|--|
| City Clerk | Recordkeeping | 814 | CITY CHARTER - Including all amendments. | PERMANENT |
| City Clerk | Recordkeeping | 815 | CITY SEAL AND ALL MODIFICATIONS | PERMANENT |
| City Clerk | Recordkeeping | 816 | OATHS OF OFFICE - Records documenting the oaths of office taken by all officers of the City as defined by Section 900 and 903 of the City Charter. | Term + 6 Years |
| City Clerk | Recordkeeping | 817 | BOARD, COMMISSION, AND COMMITTEE RECORDS | See Citywide General Schedule |
| City Clerk | Recordkeeping | 818 | APPLICATIONS FOR BOARDS AND COMMISSIONS, UNSUCCESSFUL - Applications by individuals to serve on boards and commissions that were not successful. | 2 Years |
| City Clerk | Recordkeeping | 819 | BOARDS AND COMMISSIONS ROSTERS AND MASTER LIST - Citywide semi-annual roster of members and terms for council appointed commissions, boards, and other bodies, and the master listing of all of these entities. | Until no longer useful after a 2 year minimum. |
| City Clerk | Recordkeeping | 820 | THE PUBLIC RECORD - Correspondence and other communications filed with the City Clerk and presented to the Rules and Open Government Committee | 2 Years |
| City Clerk | Recordkeeping | 821 | CONTRACTS | See Citywide General Schedule |
| City Clerk | Recordkeeping | 822 | EMPLOYMENT CONTRACTS - Obsolete records of contracts between the City and individual employees outlining the terms of employment-- now discontinued. Excludes employment contracts for Council appointees. | End tenure + 5 Years |
| City Clerk | Recordkeeping | 823 | CLAIMS RECEIPT RECORDS - Records documenting the receipt of claims against the City and the transfer of those claims to the City Attorney's Office | 5 Years |
| City Clerk | Recordkeeping | 825 | CITY COUNCILMEMBER GRANT RECORDS - Records documenting the award and administration of discretionary grants by Councilmembers. | End of term+5 Years |
| City Clerk | Recordkeeping | 826 | DEPUTIZATION MEMORANDA - Memoranda documenting the deputization of individuals empowering them to perform various City functions. | No Longer in Effect+5 Years |

City of San Jose Records Retention Schedule

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|------------|---------------|-----|---|---------------------|
| City Clerk | Recordkeeping | 827 | BOARD AND COMMISSION MEMBER SELECTION RECORDS - Records documenting the application and selection of members of the public to serve on City boards and commissions, including but not limited to applications and supporting materials. | End of Term+2 Years |
|------------|---------------|-----|---|---------------------|

City Council

| | Series # | Title and Description | Retention |
|--------------|----------|--|--------------------------------------|
| ALL | | | |
| City Council | ALL | 861 PROJECTS/ISSUES - Records pertaining to specific projects or issues, including but not limited to correspondence, emails, memos, reports, plans, notes, and reference materials. | 2 years |
| City Council | ALL | 862 GENERAL CORRESPONDENCE - Communications, including attachments, excluding documents that are covered under other records series, to and from individuals and organizations both within and without City government. | 2 years |
| City Council | ALL | 863 SUBJECT REFERENCE FILES - Informational materials including but not limited to clippings, brochures and pamphlets, copies of reports or other records for which the record copy is maintained elsewhere, and other items retained solely for reference value. | Until No Longer Useful for Reference |
| City Council | ALL | 864 MEETINGS - Documents compiled or received in preparation for or during meetings of the City Council, Committees, or other official bodies, including but not limited to copies of notices, agenda, minutes, ordinances, resolutions, contracts, memoranda, reports, and reference materials. | Until No Longer Useful for Reference |
| City Council | ALL | 865 POLICY AND LEGISLATIVE DEVELOPMENT - Documents created and/or compiled during the development of new or revised policies and/or legislation. | 2 years |
| City Council | ALL | 866 SPEECHES, ADDRESSES, AND PRESENTATIONS - Text of formal proclamations, speeches, addresses, and presentations by Council members. | 2 years |
| City Council | ALL | 867 AUDIO-VISUAL RECORDS - Photographs, video, and other AV materials not maintained elsewhere in other City offices. | 2 years |
| City Council | ALL | 869 APPOINTMENTS - Records documenting the search for and appointment of individuals to serve on commissions, task forces, and other volunteer organizations. | 2 Years |

City of San Jose Records Retention Schedule

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| City Council | ALL | 870 | CONSTITUENT SERVICES - Correspondence with constituents regarding specific complaints, requests for service, or other issues not including Public Records Act requests. | 2 Years |
| City Council | ALL | 871 | CALENDARS AND SCHEDULES - Records documenting upcoming and past events regarding the activities of Council members and senior staff. | 2 Years |

City Manager

| | | Series # | Title and Description | Retention |
|-----------------------|----------------|----------|---|---|
| Administration | | | | |
| City Manager | Administration | 528 | STANDING COUNCIL COMMITTEES ANCILLARY RECORDS - Supporting records for committee meetings including but not limited to presentations, notices, affidavits, and working files. | 5 Years |
| City Manager | Administration | 530 | AD HOC COMMITTEE RECORDS - Records of neighborhood and other temporary committees including but not limited to agenda, minutes, correspondence, and reports. | 2 Years |
| City Manager | Administration | 531 | INTERGOVERNMENTAL RELATIONS PROGRAM RECORDS - Records documenting the management of the City's Intergovernment Relations program, including but not limited to copies of bills and legislation and associated documents, correspondence, emails, reference materials, reports, notes, and memoranda. | 2 Years |
| City Manager | Administration | 535 | GRANT ADMINISTRATION RECORDS - Records documenting the successful application for, and the award, use, and general administration of various grants from State and Local agencies and other entities, including but not limited to applications, correspondence, follow-up requests, awards, and reports. | Final Report+4 Years or requirements of granting agency whichever is longer |
| City Manager | Administration | 538 | MAYOR AND COUNCIL MEMBER FILES - Records documenting interactions with the Mayor and individual Council members including regular meetings, projects, and special issues, and consisting of correspondence, notes, meeting agendas, memoranda, reference materials, and other documents and files. | Term(s) of Office + 2 Years |
| City Manager | Administration | 560 | SUBJECT AND CORRESPONDENCE FILES, SENIOR STAFF - Records documenting various projects, issues, programs, and activities overseen or managed by the Office including but not limited to correspondence, emails, plans, proposals, presentations, reports, and memoranda. | 5 Years minimum, but may be retained longer if useful |

Agenda Services

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|--------------|-----------------|-----|---|---------|
| City Manager | Agenda Services | 536 | REFERRAL FILES - Records of Council action items referred to staff and of follow-up activities. | 2 Years |
| City Manager | Agenda Services | 669 | INFORMATION MEMORANDA - Memoranda from City departments and offices to the Mayor and City Council providing information not requiring Council action. | 2 Years |

Budget Office

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|--------------|---------------|-----|---|--|
| City Manager | Budget Office | 540 | DEPARTMENT BUDGET FILES - Records documenting budget issues for each department/office, including but not limited to budget requests, supporting materials, justifications, proposed and ongoing projects, analysis, and additional reports generated to back up budget decisions. | 5 Years |
| City Manager | Budget Office | 541 | POSITION CONTROL RECORDS - Records used in the management of City staffing levels, including but not limited to information on all positions, analysis of staffing, new position requests, requests to fill during hiring freezes, and recommendations regarding positions and position levels. | 4 Years |
| City Manager | Budget Office | 542 | COUNCIL FINANCIAL REPORTS - Memoranda provided to Council on a periodic basis containing information on City revenues and expenditures, and on the management of the City budget generally. | 4 Years |
| City Manager | Budget Office | 543 | ADOPTED BUDGETS - Final Adopted Capital and Operating budgets approved by Council. | PERMANENT |
| City Manager | Budget Office | 544 | BUDGET ADDENDA - Memos accompanying the Proposed Budgets providing background information on specific issues. | 5 Years |
| City Manager | Budget Office | 546 | ANNUAL REPORTS - Reports to the Council made on an annual basis regarding City revenues and expenditures for the previous year and of the City's current financial condition. | PERMANENT |
| City Manager | Budget Office | 549 | BUDGET OFFICE PROJECT RECORDS - Records documenting specific projects including but not limited to correspondence, memoranda, emails, notes, reports, spreadsheets, calculations, and reference materials. | Completion or Termination of Project+5 Years |

City of San Jose Records Retention Schedule

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|-----------------------|----------------|-----|---|--|
| City Manager | Budget Office | 577 | BUDGET REPORTS AND PUBLICATIONS, NON-PERMANENT - Periodic reports and other publications regarding budgetary information and issues retained for reference purposes and not requiring permanent retention, including but not limited to Fees and Charges, Mid-Year Budget Review, City Manager's Budget Request and Five-Year Forecast and Revenue Projections, and Budgeted Funds Guide. | 10 Years |
| City Manager | Budget Office | 578 | OPERATING AND CAPITAL BUDGET LOCKED DATA - Data created and used in the creation of operating and capital budgets that has been "locked" and is no longer subject to revision, maintained currently within the Automated Budget and the Capital Automated Budget Systems but may be migrated to new systems in the future. | Retain until no longer useful after a minimum of 2 Years |
| City Manager | Budget Office | 579 | PROPOSED BUDGETS - Operating and Capital Budgets proposed by the City Manager to the Council. | 10 Years |
| Communications | | | | |
| City Manager | Communications | 661 | PRESS RELEASES - Master copy of press releases distributed by or through the City Manager's Office. | PERMANENT |
| City Manager | Communications | 662 | MEDIA ADVISORIES AND ALERTS - Brief information releases to the media regarding issues requiring immediate dissemination to the public or not significant enough to require a formal Press Release. | 2 Years |
| City Manager | Communications | 663 | LOGOTYPES - City of San Jose official logos maintained by the Communications Office. | PERMANENT |
| City Manager | Communications | 664 | CITY COUNCIL MEETING VIDEO - Video footage of City Council meetings. | Indefinite - minimum of two years |
| City Manager | Communications | 665 | PHOTOGRAPHIC RECORDS - Still photographs created or acquired for publicity and other public relations purposes. | Indefinite - minimum of 2 years |
| City Manager | Communications | 666 | PROJECT AND PROGRAM FILES - Records relating to the various projects, programs, events, and activities with which the Office involved with or manages/oversees including but not limited to correspondence, notes, reports, memoranda, saved emails, and reference materials. | Completion / Closure + 5 Years |

City of San Jose Records Retention Schedule

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|---------------------------|--------------------|-----|---|--|
| City Manager | Communications | 667 | WEB PLANNING AND MANAGEMENT RECORDS - Records related to planning and management of the City's Internet and Intranet presence including but not limited to plans, surveys, designs, memoranda, emails, reports, and posting requests. | 2 Years |
| City Manager | Communications | 668 | RECORDS RETENTION SCHEDULE FILES - Active and superseded records retention schedules for all departments and supporting documentation including but not limited to transmittal and approval memos, and approved revision forms | Superseded or Obsolete + 5 Years |
| Employee Relations | | | | |
| City Manager | Employee Relations | 552 | EMPLOYEE RELATIONS RECORDS - Records documenting employee relations matters involving individual employees or incidents, including but not limited to formal and informal discipline, investigations that do not result in disciplinary action, complaints, and Fair Employment related records such as administrative complaints and EEOC and DFEH responses. | Completion / Closure+ 20 Years |
| City Manager | Employee Relations | 553 | LABOR-MANAGEMENT NEGOTIATION & AGREEMENT RECORDS - Records documenting negotiations & agreements between City & unions including but not limited to final written agreements (including MOA's & side agreements), arbitration, notes, surveys, decisions, drafts, background, meet & confer, agreements of individual issues, & PERB complaints/charges & supporting documentation. | PERMANENT |
| City Manager | Employee Relations | 556 | LABOR RELATIONS RECORDS - Records of interactions with employee unions excluding labor-management agreements (see series #553) and including but not limited to grievances, informal labor complaints, Labor-Management Committee files, Department of Industrial Relations complaints and supporting documentation, and all other documentation such as issue or subject files. | Completion / closure of issue + 20 Years |
| City Manager | Employee Relations | 671 | CITY POLICY MANUAL - All documentation regarding the updating or development of City administrative policies, including approvals, superseded and cancelled policies, and communications regarding policies, including those giving notice of additions and changes to bargaining units. | PERMANENT |

City of San Jose Records Retention Schedule

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|--------------|--------------------|-----|---|---|
| City Manager | Employee Relations | 672 | VACATION CARRYOVER RECORDS - Records documenting the carryover of vacation by employees. | 5 Years |
| <hr/> | | | | |
| City Manager | Employee Relations | 673 | ALTERNATIVE WORK SCHEDULE RECORDS - Applications by employees for alternative work schedules and the subsequent approval or denial of those applications. | 2 Years or until superseded or obsolete, whichever is longer. |
| <hr/> | | | | |
| City Manager | Employee Relations | 674 | FURLOUGH/SPECIAL REDUCED WORKWEEK APPLICATION RECORDS - Applications by employees for furloughs or special reduced workweeks and the subsequent approval or denial of those applications. | 5 Years |
| <hr/> | | | | |

Citywide General

| | | Series # | Title and Description | Retention |
|--|-------------------------------------|----------|---|--|
| General Administration & Workpapers | | | | |
| Citywide General | General Administration & Workpapers | 146 | POSTAGE RECORDS - Private carrier receipts (i.e. UPS or Federal Express), postage meter logs, messenger services. | 2 Years |
| Citywide General | General Administration & Workpapers | 153 | MEETING RECORDS, ROUTINE - Staff, departmental, management and admin committees, retreats, department orientation, conferences, seminars, and other routine meetings, but not including any meeting related records that are covered by series #164 or #166. | 2 Years |
| Citywide General | General Administration & Workpapers | 156 | POLICIES AND PROCEDURES, ADMINISTRATIVE - Departmental policies, procedures, general orders, standards, guidelines, forms, safety rules & regulations, department mission statement, best practices. These do not include Council policies, Citywide administrative policies, or any policies and/or procedures needed to document compliance with federal or state statutes, regulations, or guidelines. | Until Superseded+2 Years |
| Citywide General | General Administration & Workpapers | 157 | STUDIES/REPORTS, ROUTINE ADMINISTRATIVE - All studies and reports created and/or commissioned by the City, including facilities, land and/or reorganization and excluding any such documents covered by other records schedules. | 5 Years minimum, but may be retained longer if useful for reference. |
| Citywide General | General Administration & Workpapers | 159 | DEPARTMENT WORK PLANS - Annual and other routine plans used to guide departmental work. | 5 Years |
| Citywide General | General Administration & Workpapers | 163 | COUNCIL REFERRALS - Copies of referrals from City Council members seeking information on various topics routed through and coordinated by the City Manager's Office. | Until matter is closed and no longer needed for reference. |
| Citywide General | General Administration & Workpapers | 176 | SUBPOENAS - Requesting information on cases not involving the City. | 2 Years |
| Citywide General | General Administration & Workpapers | 393 | INTERNET DOMAIN NAME REGISTRATION AND MAINTENANCE RECORDS - Records documenting the registration and maintenance of the Department web site domain names. | Expiration/renewal or 2 years whichever is longer. |

City of San Jose Records Retention Schedule

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|------------------|-------------------------------------|-----|--|--|
| Citywide General | General Administration & Workpapers | 404 | ACTIVITY REPORTS & LOGS - Records documenting routine activities on a periodic basis and not subject to other retention requirements in statute, regulation or policy. | 2 Years |
| Citywide General | General Administration & Workpapers | 405 | PARKING VALIDATION RECORDS - Logs and other records documenting the validation of parking for visitors. | 4 Years |
| Citywide General | General Administration & Workpapers | 561 | SCHEDULES AND CALENDARS - Routine appointment calendars and work schedules. | 2 years |
| Citywide General | General Administration & Workpapers | 562 | SUPPLIES INVENTORY MANAGEMENT RECORDS - Inventories and other records documenting the management of office and other work supplies, excluding hazardous materials or any other materials subject to other retention requirements. | Superseded + 2 years |
| Citywide General | General Administration & Workpapers | 563 | PUBLIC RECORDS ACT REQUESTS AND RESPONSES - Includes original requests and responses, copies of materials supplied to the requestor, background documentation, and tracking information. | 2 Years |
| Citywide General | General Administration & Workpapers | 565 | RECORDS DESTRUCTION DOCUMENTATION - Records documenting the destruction of records according to approved records retention schedules. | 2 Years |
| Citywide General | General Administration & Workpapers | 566 | REFERENCE FILES - Articles, brochures, reports, news clippings, downloaded or web pages, and other non-record materials retained for informational purposes only. | Until no longer useful for reference. |
| Citywide General | General Administration & Workpapers | 568 | CONVENIENCE COPIES - Copies of documents and/or files for which the official copy of record is retained elsewhere. | Until no longer useful for reference, but no longer than the official copy of record |
| Citywide General | General Administration & Workpapers | 569 | DRAFTS AND WORKPAPERS - Drafts of documents and files not ordinarily retained in the normal course of business including but not limited to notes, raw data, raw video footage and other materials collected and created during the course of finalizing a final record. | Until superseded or no longer needed for reference. |

City of San Jose Records Retention Schedule

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| Citywide General | General Administration & Workpapers | 572 | PROGRAM AND PROJECT PROPOSALS - Proposals for new programs and projects including but not limited to project/program descriptions, preliminary plans, estimates of resources required, projected schedules, and supporting documents, but excluding any such records that are retained in other specific records series. See series #388 and #570 for proposals that are part of grant applications. | 2 Years |
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Boards Commissions and Committees

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| Citywide General | Boards Commissions and Committees | 164 | COMMISSIONS, BOARDS, & COMMITTEES (COUNCIL APPOINTED) MEETING FILES - Minutes and other meeting related records excluding drafts, convenience copies, and documents covered by other retention schedules. | PERMANENT |
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| Citywide General | Boards Commissions and Committees | 165 | COMMISSIONS, BOARDS & COMMITTEES (COUNCIL APPOINTED) ADMINISTRATIVE RECORDS - Including but not limited to project files, reports, notices, work plans, and correspondence of Council appointed commissions, boards, committees and other volunteer workgroups (e.g., taskforces). | 5 Years |
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| Citywide General | Boards Commissions and Committees | 166 | COMMITTEES (ADMINISTRATIVELY APPOINTED) MEETING RECORDS - Minutes and other meeting related records of Council standing committees excluding drafts, convenience copies, and documents covered by other retention schedules. | Life of Committee+2 Years |
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| Citywide General | Boards Commissions and Committees | 167 | COMMITTEES (ADMINISTRATIVELY APPOINTED) ADMINISTRATIVE RECORDS - Including but not limited to projects, reports, notices, work plans, and correspondence of administratively appointed committees, taskforces, and other volunteer workgroups. | 5 Years |
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| Citywide General | Boards Commissions and Committees | 571 | AUDIO-VISUAL RECORDINGS OF MEETINGS - Audio and/or video recordings of meetings of commissions, boards, committees, and other City bodies that are required to create such recordings. | 2 Years |
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Communications and Outreach

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| Citywide General | Communications and Outreach | 154 | CORRESPONDENCE AND COMMUNICATIONS, GENERAL - Communications of a general nature that are not retained in other specific records series or subject to specific records retention requirements in regulation or statute, including but not limited to correspondence, memos, message logs, notes, chronological files, bulletins, public inquiries, complaints and responses. | 2 Years |
| Citywide General | Communications and Outreach | 155 | PUBLICATIONS - Published by or for the City and intended for public dissemination, including but not limited to books, brochures, event programs, invitations, advertising, flyers, pamphlets, newsletters, photos, videos, press releases, media releases, logos, and banners. | Retain 1 copy PERMANENTLY |
| Citywide General | Communications and Outreach | 386 | PUBLIC HEARING AND OUTREACH RECORDS - Records documenting efforts to inform the public and gain input regarding proposed new and revised programs, services, requirements, plans, and other City activities, and including but not limited to meeting notices and advertisement, attendance records, presentation materials, and proceedings. Does not include records covered by series #164 and #166 or records of City Council or Council Committee meetings. | 2 Years |
| Citywide General | Communications and Outreach | 567 | MAILING/CONTACT LISTS - Includes electronic files such as spreadsheets, databases, and word processing documents, in addition to or in place of paper lists, that are updated on a continuous basis or discarded when no longer needed for reference. | Until superseded or obsolete. |

Facilities & Equipment

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| Citywide General | Facilities & Equipment | 169 | ARCHITECTURAL AND ENGINEERING DESIGN AND CONSTRUCTION RECORDS - Records documenting the planning, design, construction, and acceptance of architectural and engineering structures, and which are not convenience copies (see Citywide General series # 568) of original records maintained by the Department of Public Works. | Retain in accordance with the Department of Public Works retention schedule. |
| Citywide General | Facilities & Equipment | 398 | FACILITY AND EQUIPMENT PERMITS - Permits required for operation of facilities and equipment required by state or federal agencies, excluding any such records which must be retained longer according to statute or regulation. | Life of permit + 2 years |

City of San Jose Records Retention Schedule

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| Citywide General | Facilities & Equipment | 574 | EQUIPMENT MAINTENANCE RECORDS - Records documenting maintenance and repair services for equipment and vehicles, but excluding equipment managed centrally by another City department, and any equipment records that must be retained for longer periods according to specific statutes, regulations, or other legal requirements. Excludes records pertaining to underground storage tanks (see series #393 thru #397). | Equipment No Longer in Use + 2 Years |
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| Citywide General | Facilities & Equipment | 575 | EQUIPMENT INVENTORY AND MANAGEMENT RECORDS - Inventories, assignments, replacement schedules and other records documenting management of equipment and vehicles excluding records for equipment managed centrally by another City department, for any equipment records that must be retained according to specific statutes or regulations. | Superseded + 2 Years |
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Finance, Budget & Grants

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| Citywide General | Finance, Budget & Grants | 147 | BUDGET PREPARATION RECORDS - Materials created and used by Departments when developing budget requests, including but not limited to proposal narratives, emails, memoranda, estimates, spreadsheets, notes, calculations, fees and rates modelas, and drafts. | Retain until no longer useful for reference. |
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| Citywide General | Finance, Budget & Grants | 168 | CONTRACTS, GENERAL - Service and other contracts, and any records needed to document contract compliance and/or performance. Does NOT include design and construction contracts, Williamson Act contracts, or contracts for sale or other transfer of real property. | Term + 5 Years |
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| Citywide General | Finance, Budget & Grants | 170 | PROCUREMENT AND PURCHASING RECORDS - Records documenting procurement and contracting activities not conducted by the Finance Department/Purchasing Division or involving capital construction including but not limited to Qualifications Based Selection, Requests for Proposal, Request for Qualifications, Request for Information, proposal evaluation forms, confidentiality agreements, conflict of interest forms, and unsuccessful bids. | 4 Years |
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| Citywide General | Finance, Budget & Grants | 174 | DEPARTMENT CHECKING ACCOUNT RECORDS - Statements, reconciliations, deposit slips, cancelled checks. | 4 Years |
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| Citywide General | Finance, Budget & Grants | 175 | DEPARTMENT CHECKING ACCOUNT SIGNATURE AUTHORIZATIONS. | Until Superseded+2 Years |
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City of San Jose Records Retention Schedule

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| Citywide General | Finance, Budget & Grants | 245 | CELLULAR PHONE PAYMENT TRACKING RECORDS - Records documenting the payment of cellular phone bills. | 2 Years |
| Citywide General | Finance, Budget & Grants | 387 | GRANT AWARD AND MONITORING RECORDS, AWARDED BY CITY - Records documenting grants that are awarded by the City to external entities and subsequent monitoring of use of the funds, compliance with grant agreements, and final effects of the grant. | Term of Grant + 5 Years |
| Citywide General | Finance, Budget & Grants | 388 | GRANT APPLICATIONS, UNSUCCESSFUL - Applications for grants which were not successful. Includes both applications to the City and by the City. | 2 Years |
| Citywide General | Finance, Budget & Grants | 570 | GRANT PROJECT ADMINISTRATION RECORDS, RECEIVED BY CITY - Records documenting the administration of grant funded projects or programs, including but not limited to successful applications, plans, correspondence, reports, memoranda, emails, and project budgets. For unsuccessful applications, see series #388. | Final Activity+5 Years or Granting Agency's Retention Requirement, Whichever Is Longer |
| Citywide General | Finance, Budget & Grants | 576 | REVENUE AND FEE RECEIPTS RECORDS - Records of revenue and fees received and their collection including but not limited to receipts, receipt logs and registers, invoices, cash register tapes, correspondence, billing notices, and records of transfers to the Finance Department. | 4 Years |

Human Resources

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| Citywide General | Human Resources | 148 | DEPARTMENT PERSONNEL FOLDERS - Records for individual employees, including but not limited to evaluations, outside work permits, licenses, certificates, emergency notification, and training certificates of classes attended, but excluding any materials for which the record copy is maintained by Human Resources (see series #568 Convenience Copies). | Term of employment +2 Years |
| Citywide General | Human Resources | 149 | EMPLOYEE TIME RECORDS - Records documenting the management of employee work time including but not limited to work schedules, time-off requests, and sign-out sheets, but excluding any materials for which the record copy is maintained by Human Resources or Finance (see series #568 Convenience Copies). | 3 Years |

City of San Jose Records Retention Schedule

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| Citywide General | Human Resources | 150 | RECRUITMENT RECORDS - Records documenting the search for and recruitment of departmental staff, but excluding any materials for which the record copy is maintained by Human Resources (see series #568 Convenience Copies). | Recruitment completed or cancelled+2 years |
| Citywide General | Human Resources | 151 | SUPERVISORY FILES, INFORMAL DISCIPLINE - All documents maintained by supervisor regarding informal discipline including but not limited to counseling memoranda, letters of reprimand, and notes. | 2 Years |
| Citywide General | Human Resources | 152 | SUPERVISORY FILES, FORMAL DISCIPLINE - All documents relating to formal disciplinary actions such as suspension, salary step reduction, demotion and dismissal. | Personnel Action+2 Years |
| Citywide General | Human Resources | 158 | PROFESSIONAL ASSOCIATION MATERIALS - Copies of minutes, notes, correspondence, membership records, presentations and other materials associated with membership in work-related professional associations. | 2 Years |
| Citywide General | Human Resources | 171 | VOLUNTEER PROGRAMS ADMINISTRATIVE RECORDS - Complaints, schedules, weekly logs, sign-in sheets, memos, expense reimbursements, training schedules, training registrations. | 2 Years |
| Citywide General | Human Resources | 172 | VOLUNTEER FILES - Records documenting the service of individual volunteers, including but not limited to waivers, applications, and key logs. | End of Volunteer Service + 3 Years |
| Citywide General | Human Resources | 173 | VOLUNTEER CONTACT INFORMATION - Names, addresses, telephone numbers, and email addresses of volunteers and their designated emergency contacts. | Until Superseded |
| Safety, Health & Environment | | | | |
| Citywide General | Safety, Health & Environment | 160 | MATERIAL SAFETY DATA SHEETS (MSDS) - Written or printed material concerning a hazardous chemical which is prepared in accordance with OSHA regulations. | Hazardous chemical substance use discontinued + 30 years |
| Citywide General | Safety, Health & Environment | 161 | EMERGENCY PREPAREDNESS - Department emergency plans, evacuation plans, phone trees, and other records relating to preparation for possible emergencies. | Until Superseded+2 Years |
| Citywide General | Safety, Health & Environment | 385 | SECURITY VIDEO - Routine monitoring security videotapes and files. | 1 Year |

City of San Jose Records Retention Schedule

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| Citywide General | Safety, Health & Environment | 389 | SAFETY AND HEALTH INSPECTION AND MONITORING RECORDS - Records documenting the inspection, monitoring, and results thereof of City facilities and equipment in regard to health and safety, including but not limited to inspection forms, hazard identification and correction forms, and other reports and follow-up documents, and excluding records pertaining to underground storage tanks (see series #394 thru #397). | 3 Years |
| Citywide General | Safety, Health & Environment | 390 | CONFINED SPACE ENTRY PERMITS - Records documenting the obtaining of permits to permit employees to enter confined spaces as defined by 8 CCR 5157. | Permit cancellation plus 2 years |
| Citywide General | Safety, Health & Environment | 391 | SAFETY TRAINING RECORDS - Records documenting staff training regarding on the job safety. | Duration of employee trained or 2 years whichever is longer. |
| Citywide General | Safety, Health & Environment | 392 | AIR QUALITY RECORDS – Records documenting compliance with air quality requirements including but not limited to collected data, inspection logs, and reports. | 5 Years minimum but data useful for long term studies may be retained longer as needed. |
| Citywide General | Safety, Health & Environment | 394 | UNDERGROUND STORAGE TANK WRITTEN PERFORMANCE CLAIMS - Records documenting manufacturer/installer claims of performance for release detection systems of underground storage tanks. | 5 Years |
| Citywide General | Safety, Health & Environment | 395 | UNDERGROUND STORAGE TANK CATHODIC PROTECTION MAINTENANCE RECORDS - Records documenting routine monitoring and maintenance of cathodic protection devices for underground storage tanks. | 6.5 Years |
| Citywide General | Safety, Health & Environment | 396 | UNDERGROUND STORAGE TANK ROUTINE MONITORING AND MAINTENANCE RECORDS - Records documenting routine monitoring and maintenance of underground storage tanks. | 3 Years |
| Citywide General | Safety, Health & Environment | 397 | UNDERGROUND STORAGE TANK REPAIR, LINING AND UPGRADE RECORDS - Records documenting repairs, overhauls, linings, modifications, upgrades and other substantive changes to underground storage tanks. | Life of Tank + 2 Years |

City of San Jose Records Retention Schedule

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| Citywide General | Safety, Health & Environment | 399 | RECORDINGS OF TELEPHONE AND RADIO COMMUNICATIONS - Routine daily taping and recording of telephone communications to and from City departments and all radio communications relating to the operations of departments. | 100 Days |
| Citywide General | Safety, Health & Environment | 400 | TOXIC SUBSTANCE EXPOSURE RECORDS - Records of exposure or possible exposure of an employee to a toxic substance or other harmful physical agent (e.g., asbestos, lead, including background data to environmental monitoring or measuring, biological monitoring records which are designated as exposure records, material safety data sheets or chemical inventory records indicating use and identity of a toxic substance or harmful physical agent, and related records. | Term of employment + 30 years |
| Citywide General | Safety, Health & Environment | 401 | HAZARDOUS MATERIALS SPILL REPORTS - Records documenting the required reporting of hazardous materials spills to state and federal agencies excluding any such records that fall under series 403 Environmental Clean Up and Remediation Project Records. | 5 years |
| Citywide General | Safety, Health & Environment | 402 | HAZARDOUS MATERIALS SHIPPING PAPERS - Shipping manifests for hazardous materials shipped or received. | 3 Years |
| Citywide General | Safety, Health & Environment | 403 | ENVIRONMENTAL CLEAN UP AND REMEDIATION RECORDS PROJECT RECORDS - Records documenting clean up and remediation efforts on sites identified as environmental hazards, including but not limited to correspondence, memos, reports, regulatory records, consultant records, design records, monitoring records, stipulations, order of consent, legal records, confirming investigation, environmental site assessment (ESA), remedial investigation feasibility study (RIFS), remediation action plan (RA), maintenance and monitoring plan, project closure notice (notice of remedial action or no further action (NFA) and other related records. | PERMANENT |
| Citywide General | Safety, Health & Environment | 564 | VISITOR AND FACILITY ADMITTANCE LOGS - Sign-ins by visitors and other records that document entry of individuals into City offices and facilities. | 2 Years |

City of San Jose Records Retention Schedule

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| Citywide General | Safety, Health & Environment | 573 | INCIDENT REPORTING AND INVESTIGATION RECORDS - Records documenting routine security or safety related incidents including but not limited to complaints, incident reports, accident reports, and investigation records, but excluding any records that must be retained according to specific statutes or regulations or which are covered by department specific retention schedules. | 3 Years |
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Economic Development

| | Series # | Title and Description | Retention |
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| ALL | | | |
| Economic Development | ALL | 701 ECONOMIC DEVELOPMENT PROGRAM AND PROJECT ADMINISTRATION RECORDS - Records documenting the development and administration of economic development programs and projects such as corporate outreach, revenue generation, business improvement districts, and international outreach, including but not limited to correspondence, emails, plans, proposals, presentations, and memoranda. | 2 Years |
| Economic Development | ALL | 702 SMALL BUSINESS LOAN RECORDS - Records documenting loans to small business from the Revolving Loan Fund, including but not limited to applications, agreements, awards, reports, correspondence, and payments. | 5 Years |
| Economic Development | ALL | 703 SMALL BUSINESS LOAN APPLICATIONS, UNSUCCESSFUL - Applications for Small Business Loans which were not awarded, including supporting materials, reasons for the decision not to fund, and the communication of the decision to the applicant. | 2 Years |
| Economic Development | ALL | 704 SMALL BUSINESS TECHNICAL ASSISTANCE PROGRAM RECORDS - Correspondence, reports, plans, referrals, and any other records documenting the provision of technical assistance to small businesses. | 2 Years |
| Economic Development | ALL | 705 ENTERPRISE ZONE DESIGNATION RECORDS - Records documenting the application for and designation of the City as an Enterprise Zone, and all records required for maintenance of that designation including but not limited to plans required by state and federal regulations. | Life of Program + 5 Years |
| Economic Development | ALL | 706 ENTERPRISE ZONE EMPLOYER APPLICATIONS AND VOUCHERS - Applications from employers for certification of eligibility for Enterprise Zone tax benefits, records of approval or denial, and vouchers issued to the successful applicants. | 5 Years |

City of San Jose Records Retention Schedule

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| Economic Development | ALL | 707 | FOREIGN TRADE ZONE DESIGNATION RECORDS - Records documenting the designation of the San Jose FTZ, its continuance and any revisions to it, including but not limited to the original application, annual reports, applications and approvals/denials for revisions, and any supporting materials. | Life of Program + 5 Years |
| Economic Development | ALL | 708 | FOREIGN TRADE ZONE OPERATOR RECORDS - Records documenting the agreements between the City and the FTZ operator(s) including any records needed to document performance and compliance. | Term of Agreement + 5 Years |
| Economic Development | ALL | 709 | FOREIGN TRADE SUB-ZONE RECORDS - Records documenting the designation of FTZ sub-zones, their continuance and any revisions, including but not limited to original applications, agreements, reports, applications and approvals/denials for revisions, and any supporting materials. | Life of Sub-Zone + 5 Years |
| Economic Development | ALL | 710 | WORKFORCE INVESTMENT ACT FUNDED PROGRAM RECORDS - All records, with exception of grant administration records, documenting programs funded under the Federal Workforce Investment Act including but not limited to Adult Program, Dislocated Worker Program, Youth Program, and Rapid Response Program. | 3 years |
| Economic Development | ALL | 711 | GRANT ADMINISTRATION RECORDS - Applications, proposals, awards, agreements, correspondence, reports, performance tracking, plans, and other records documenting the administration of grants awarded by the Office. Does not apply to records documenting grants received by the Office (see series #570 of the Citywide General Records Retention Schedule). | 5 Years |
| Economic Development | ALL | 712 | GRANT APPLICATIONS, UNSUCCESSFUL - Applications and proposals for grants which were not awarded by the Office, including applications, supporting materials, and materials documenting reasons for the decision not to fund and the communication of the decision to the applicant. | 2 Years |

City of San Jose Records Retention Schedule

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| Economic Development | ALL | 713 | PUBLIC ART PROJECT RECORDS - Records documenting the planning and administration of projects to commission public works of art, including but not limited to plans, proposals, RFP's, selections, designs, presentations, correspondence, reports, and marketing materials. Excludes original contracts (see Citywide General Records Retention Schedule series #168 and #169). | 2 Years |
| Economic Development | ALL | 714 | PUBLIC ARTWORK CURATORIAL RECORDS - Series documenting the acquisition, care, maintenance, repair, restoration, provenance, and, if applicable, transport, removal, or destruction of individual works in the City's collection of public artwork. | PERMANENT |
| Economic Development | ALL | 715 | EVENT PRODUCTION RECORDS - Records documenting the planning and production of City public events, including but not limited to proposals, correspondence, reports, insurance, and marketing materials. Excludes original contracts (see Citywide General Records Retention Schedule series #168). | 2 Years |
| Economic Development | ALL | 716 | SPONSORSHIP RECORDS - Records documenting the negotiation and development of sponsorship partnerships between the City and businesses including but not limited to correspondence, proposals, plans, and reports. Excludes original contracts (see Citywide General Records Retention Schedule series #168). | 2 Years |
| Economic Development | ALL | 717 | EVENT PERMITTING AND COORDINATION RECORDS - Records documenting the process of approving/denying public event permits and providing coordination services to permit holders, including but not limited to applications, approval/denial notices, correspondence, plans, and other records documenting the administration of the public event permit program. | 2 Years |
| Economic Development | ALL | 718 | AUDIO-VISUAL RECORDS - Photographs, sound recordings, video, artwork and other audio or visual records not retained elsewhere by the City documenting City-produced events or created for marketing and other uses. | PERMANENT |

City of San Jose Records Retention Schedule

Economic
Development

ALL

719

CULTURAL PROGRAM AND PROJECT
ADMINISTRATION RECORDS - Records documenting the
development and administration of cultural programs and
projects such as arts education, neighborhood arts, and
public arts, including but not limited to correspondence,
emails, plans, proposals, presentations, and memoranda.

2 Years

Environmental Services

| | | Series # | Title and Description | Retention |
|------------------------------------|-----------------------------|----------|---|---|
| Integrated Waste Management | | | | |
| Environmental Services | Integrated Waste Management | 442 | INTEGRATED WASTE MANAGEMENT PROJECT AND PROGRAM FILES - Records retained for programmatic purposes that document the development and administration of Integrated Waste Management programs and projects such as recycling, zero waste, and waste prevention including but not limited to correspondence, emails, plans, proposals, presentations, and memoranda, but excluding any records required to be retained longer under any grant agreement. | 2 Years |
| Environmental Services | Integrated Waste Management | 443 | SOLID WASTE PLAN WORKING FILES - Documents, files, and data created or collected during the development of Solid Waste Plans required by the California Waste Management Act. | Until next plan revision or 2 years whichever is longer |
| Environmental Services | Integrated Waste Management | 444 | SOLID WASTE PLANS - Planning documents required by the California Waste Management Act including the Source Reduction and Recycling Element, and the Household Hazardous Waste Element. | Permanent |
| Environmental Services | Integrated Waste Management | 445 | GARBAGE AND RECYCLING RATES HISTORY - Records documenting the rates for garbage and recycling services over time. | 30 Years |
| Environmental Services | Integrated Waste Management | 446 | GARBAGE RATE ASSISTANCE PROGRAM RECORDS - Records documenting the receipt and review of applications by City residents for assistance with garbage rates, actions to award or deny those applications, and eligibility audits. | Renewal or termination of assistance + 2 years |
| Environmental Services | Integrated Waste Management | 447 | CONSTRUCTION AND DEMOLITION DIVERSION DEPOSIT PROGRAM RECORDS - Materials documenting the receipt and refund of construction and demolition diversion deposits, or the transfer of those funds to the City if not reclaimed by the depositor. | Refund or Transfer + 4 Years |

Water Pollution Control Plant

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| Environmental Services | Water Pollution Control Plant | 430 | WATER QUALITY MONITORING REPORTS – Water quality reports including but not limited to Monthly Self Monitoring, South Bay Water Recycling Quarterly Reclamation, and Treatment Reports. | PERMANENT |
| Environmental Services | Water Pollution Control Plant | 431 | NATIONAL POLLUTION DISCHARGE ELIMINATION SYSTEM (NPDES) CERTIFICATION RECORDS – All materials documenting the application for and renewals of NPDES certification for the plant. | Term of current certification + 3 Years |
| Environmental Services | Water Pollution Control Plant | 432 | PLANT OPERATIONS RECORDS – Records and data documenting operations of the Water Pollution Control Plant including but not limited to comprehensive wastewater studies and reports, special studies and detailed reports, sanitary surveys, environmental facility monitoring, overall operational reports, and facility inspection reports. | Retain for term of current NPDES permit + 5 years. Data useful for longer term studies may be retained longer as needed. |
| Environmental Services | Water Pollution Control Plant | 433 | NATIONAL POLLUTION DISCHARGE ELIMINATION SYSTEM (NPDES) PERMITS - Permits providing permission to operate the Water Pollution Control Plant. | PERMANENT |
| Environmental Services | Water Pollution Control Plant | 434 | RESIDUAL SLUDGE MANAGEMENT RECORDS – All records pertaining to the management of sludge produced by the WPCP including but not limited to annual reports to the Environmental Protection Agency, sales, hauling, truck inspection reports, driver's daily logs, scale certifications, fill reports, and biosolids tests. | Term of current hauler contract + 5 Years. Data useful for long term studies may be retained longer as needed. |
| Environmental Services | Water Pollution Control Plant | 435 | WASTEWATER MANAGEMENT RECORDS – Records documenting treatment and discharge of wastewater, including but not limited to treatment logs, backflow preventers, and storage. | Retain for term of current NPDES permit + 5 years. Data useful for longer term studies may be retained longer as needed. |

Water Resources

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| Environmental Services | Water Resources | 436 | CUSTOMER-OWNED EQUIPMENT INSPECTION RECORDS, POTABLE WATER - Records documenting inspections of equipment such as backflow devices owned and operated by customers for potable water. | 10 Years |
| Environmental Services | Water Resources | 437 | GROUNDWATER MONITORING DATA - Results of monitoring and testing of groundwater quality. | 5 Years |

City of San Jose Records Retention Schedule

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| Environmental Services | Water Resources | 438 | WATER QUALITY RECORDS, POTABLE WATER - Records documenting the testing and treatment of potable and/or recycled water for the purposes of achieving and maintaining acceptable water quality. | 12 Years |
| Environmental Services | Water Resources | 439 | WATER ACQUISITION AND DISTRIBUTION RECORDS, POTABLE WATER - Records documenting the acquisition and distribution of potable water and the management of those activities. | 7 Years |
| Environmental Services | Water Resources | 440 | RECYCLED WATER PERMITTING RECORDS - Records documenting the issuance and/or management of recycled water permits including but not limited to permittee inspections and testing, permittee reports, usage data, and communications. | Disconnection + 5 Years |
| Environmental Services | Water Resources | 441 | WATER DISTRIBUTION SYSTEM MAINTENANCE RECORDS - Records documenting preventative and/or repair related activities for potable and/or recycled water delivery systems or components thereof that are not covered by Citywide General series #574 Equipment Maintenance Records. | 5 Years |
| Environmental Services | Water Resources | 448 | WATER CUSTOMER SERVICE POINT RECORDS - Records documenting service provided to and management of specific customer service points including but not limited to activation, deactivation, water usage, incidents, allocations, communications, and reports. | Life of service point + 3 years |
| Environmental Services | Water Resources | 449 | WATER DELIVERY SYSTEM INFRA-STRUCTURE DOCUMENTATION - Drawings, maps, and other descriptive documentation of the physical infra-structure of the potable and recycled water delivery systems. | PERMANENT |
| Environmental Services | Water Resources | 450 | RECYCLED WATER REPORTS - Reports regarding recycled water submitted to the State and self-inspection/self-monitoring reports. | PERMANENT |

Watershed Protection

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| Environmental Services | Watershed Protection | 451 | NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) REPORTS - Reports submitted to the California Water Resources Control Board and to the US Environmental Protection Agency, including but not limited to annual reports, semi-annual reports, work plans, and special studies. | Permanent |
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City of San Jose Records Retention Schedule

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| Environmental Services | Watershed Protection | 452 | NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) PERMITS - Permits providing permission for the municipal discharge of storm water. | Permanent |
| Environmental Services | Watershed Protection | 453 | NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) CERTIFICATION RECORDS – All materials documenting the application for and renewals of NPDES Permits for the Municipal Discharge of Stormwater.. | Term of permit + 3 years |
| Environmental Services | Watershed Protection | 454 | STORMWATER INSPECTION AND ENFORCEMENT RECORDS - Records documenting the inspection and enforcement of stormwater requirements by businesses and other organizations, including but not limited to inspection reports, correspondence, laboratory analyses, grease trap inspections, and citations. | Life of the Inspected Entity + 3 years |
| Environmental Services | Watershed Protection | 455 | NATIONAL POLLUTANT DISCHARGE ELIMINATION SYSTEM (NPDES) COMPLIANCE RECORDS - All records documenting compliance with NPDES permit requirements, including but not limited to studies, reports, workplans, surveys, monitoring results, laboratory results, and project files. | Retain for term of current permit + 5 years. Data useful for long term studies may retained longer as needed. |
| Environmental Services | Watershed Protection | 456 | LABORATORY CERTIFICATION RECORDS - All materials documenting the application for and renewals of laboratory certification under the California State Environmental Laboratory Accreditation Program. | Term of current certification + 5 years |
| Environmental Services | Watershed Protection | 457 | PRETREATMENT SOURCE CONTROL PROGRAM (PSCP) RECORDS - Records documenting monitoring, inspections, and other activities relating to the enforcement of wastewater rules and regulations for industrial and critical users, including but not limited to inspection reports, correspondence, sampling, audits, laboratory analyses results, and logs. | Life of Inspected Entity + 3 Years |
| Environmental Services | Watershed Protection | 458 | LABORATORY RECORDS, MISCELLANEOUS - All materials associated with laboratory analyses NOT associated with any NPDES Permit or regulatory requirements and may include contracted or work for other departments or agencies, including but not limited to chain of custodies, laboratory results, and QA/QC data. | Date of analysis + 5 years |

Finance

| | | Series # | Title and Description | Retention |
|-------------------|------------|----------|---|------------------------------|
| Accounting | | | | |
| Finance | Accounting | 291 | FINANCIAL DATABASES - Financial Management System (FMS), Payroll, Accounts Receivable, Utility Billing, Business Tax | Indefinite |
| Finance | Accounting | 292 | ACCOUNTS PAYABLE - Invoice Entry Files, Petty Cash Edit List, Accruals, Stop Notices, Vendor Maintenance (Forms, Contract Copy, W-9s), Refunds, Encumbrance JV Edit Lists, Sales & Use Tax Returns, 1099 Filings, Check Registers, Void Check Registers, Invoice | Final payment made + 4 Years |
| Finance | Accounting | 293 | STATIONARY CONTROL FILES - Cash Receipt Books | 2 Years |
| Finance | Accounting | 299 | GENERAL LEDGER - Subsidiary Records, Ledger Reports | PERMANENT |
| Finance | Accounting | 300 | GENERAL LEDGER SUPPORT - Support Documentation, Journal Vouchers, Cash Journal Vouchers | 4 Years |
| Finance | Accounting | 301 | RECONCILIATION FILES - Fund/Program Reconciliations | 4 Years |
| Finance | Accounting | 302 | YEAR END FINANCIAL STATEMENTS & REPORTS - Financial Statements, Comprehensive Annual Financial Statements (CAFR), State Controller Annual Financial Reports, Audit Publications | PERMANENT |
| Finance | Accounting | 303 | YEAR END FINANCIAL STATEMENTS & REPORTS - Financial Statement Work papers, Audit Work papers | 10 Years |
| Finance | Accounting | 304 | PAYROLL - Withholding & Deductions, Allowances, Direct Deposit Applications, File Maintenance Request from Departments, Deferred Compensation Records (documentation regarding a portion of leave balances being applied to deferred compensation), Imputed Vehicle Files (records related to vehicle or vehicle allowances provided to City employees/officials as a benefit). | 4 Years |

City of San Jose Records Retention Schedule

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|---------|------------|-----|---|--|
| Finance | Accounting | 305 | PAYROLL - Workers' Compensation Supplemental Pay Authorization, Workers' Compensation Disability Hours/Adjustment Authorization, Deferred Vested Employee Files, Time Sheets, Time Card Adjustments, Garnishment Records | 50 Years |
| Finance | Accounting | 307 | INCOME TAX FILES - W-2s, 1099s,W-9s, DE-4s, W-4s | Superseded+4 Years |
| Finance | Accounting | 308 | BUDGET - Cost Allocation Plans including work papers | Completion of Single Audit+4 Years |
| Finance | Accounting | 311 | GRANTS - Federal Grants, State Grants, Local Grants - Contract, Reports, Disbursements, Revenue | 4 Years Past Final Payment or Granting Agency's Retention Requirement, Whichever is Longer |
| Finance | Accounting | 314 | DISTRIBUTED TAXES - (Gas, Property, Cigarette, Sales, Federal, State, County) - Support Documentation (Forms, Reports, Spreadsheets) | 4 Years |
| Finance | Accounting | 315 | MANDATED OR REQUIRED REPORTS - Annual Street Report (Streets & Highway Code Sections 2151-2155) | 5 Years |
| Finance | Accounting | 316 | EQUIPMENT INVENTORY - Support Documentation (Grant Deeds, Title Policies, Fixed Assets Accounting Transactions, Physical Inventories and Certifications) | 2 Years from Completion of Annual Inventory |
| Finance | Accounting | 317 | FIXED ASSET DATABASE | Superceded+2 Years |
| Finance | Accounting | 322 | UTILITY & ASSESSMENT DISTRICT BILLING - Lien Docs (System Reports, Correspondence), File Maintenance (Property Ownership Changes, Work Orders, Adjustments), Accounting (Bank Deposit Reconciliations, Write-Off Docs, Payment Stubs, Fund Reconciliations) | 4 Years |
| Finance | Accounting | 327 | MANDATED OR REQUIRED REPORTS - Diesel Fuel Tax Return (and underlying information) (Rev & Tax Code Section 60205.5) | 4 Years |
| Finance | Accounting | 328 | MANDATED OR REQUIRED REPORTS - Exempt Bus Operator Diesel Fuel Tax Return (Rev & Tax Code Section 60205) | 5 Years |

City of San Jose Records Retention Schedule

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| Finance | Accounting | 329 | MANDATED OR REQUIRED REPORTS - Report of Lobbyist Employer (Govt Code Section 86116) | 5 Years from the date of the final report for the calendar year |
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| Finance | Accounting | 330 | MANDATED OR REQUIRED REPORTS - Use Tax Return (and underlying information) (18 Cal. Adm. Code Section 1685) | 4 Years |
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Debt Management

| | | | | |
|---------|-----------------|-----|---|---|
| Finance | Debt Management | 312 | BONDS - Bonds issued by the City * or entities established by the City, Debt for which City is obligor - Transcripts, Proceeds Disbursement Requests, Annual Cost Allocation Plans, Trustee Statements, Rebate Reports, IRS Tax Filings, 15c2-12 Filings, Final Bond Sizing & Pricing Reports | Term of Bond+6 Years; If bonds are refunded, the term of bonds is extended to the term of the refunding bonds |
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| Finance | Debt Management | 313 | BONDS - Bonds issued by the City* or entities established by the City, Debt for which City is obligor - Official Statements | PERMANENT |
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Investment

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|---------|------------|-----|---|---------|
| Finance | Investment | 295 | BANKING - Cash Management - Debit & Credit Memos, Daily Cash Reports, Daily Cash Flow Pages | 4 Years |
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| Finance | Investment | 296 | BANKING - Bank Letters, Statements, Reconciliations, Deposit Slips, Department Checking Account Files | 4 Years |
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| Finance | Investment | 310 | INVESTMENTS - Income Allocation, Reconciliations, Quarterly Reports, Monthly Reports, Daily Reports, Weekly Reports | 4 Years |
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| Finance | Investment | 321 | SIGNATURE AUTHORIZATIONS for Financial Processes | Superseded+2 Years |
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Materials Management

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|---------|----------------------|-----|---------------|---------|
| Finance | Materials Management | 366 | SURPLUS FILES | 5 Years |
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|---------|----------------------|-----|-------------|---------|
| Finance | Materials Management | 367 | MOVES FILES | 2 Years |
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| Finance | Materials Management | 368 | EQUIPMENT - Nonvehicular - Replacement, Repairs, Operating Manuals | Life of Equipment+2 Years |
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| Finance | Materials Management | 369 | EQUIPMENT - Nonvehicular (Radios, Tools, Pagers, etc.) - Inventories | Superseded+2 Years |
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City of San Jose Records Retention Schedule

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|---------|----------------------|-----|---|-----------|
| Finance | Materials Management | 370 | AUCTIONS - Advertising, Reports (not monies) | 2 Years |
| Finance | Materials Management | 372 | RECORDS MANAGEMENT - Box Requests, Inactive Storage Inventories, Transmittals | 2 Years |
| Finance | Materials Management | 373 | RECORDS MANAGEMENT - Approved Records Destruction Lists and Certificates | 5 Years |
| Finance | Materials Management | 374 | RECORDS MANAGEMENT - Records Center Database | 2 Years |
| Finance | Materials Management | 375 | HISTORIC RESOURCES - City Collections - Press Releases, Newspaper Articles and Notices, City Publications, City Newsletters, Proclamations, City Gifts, Artifacts, Gift Documents, Photos, Scrapbooks | PERMANENT |
| Finance | Materials Management | 376 | HISTORIC RESOURCES - Registrations, Receipts, Disposition Schedules, Disposition Lists and Certificates | 5 Years |
| Finance | Materials Management | 377 | HISTORIC RESOURCES - City Gifts, Corporate Artifacts and Documents Database | PERMANENT |
| Finance | Materials Management | 378 | STORES - Requisitions, Receiving Lists, A/R Edit List, Inventories | 2 Years |
| Finance | Materials Management | 379 | PRINT SHOP - Copy Requests, Logs | 2 Years |

Procurement

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| Finance | Procurement | 380 | PURCHASING DOCUMENTS - Contracts, Purchase Order Files (service/product POs, open POs, Emergency POs), Purchase Requisitions, Requests for Proposals (RFPs), Requests for Quotes (RFQs), Requests for Information (RFI), Brand Name/Sole Source requests and determinations, Tax Exemption Status. Retention Schedules to initiate at document expiration date. Files to be purged on an annual basis. | 4 Years |
| Finance | Procurement | 381 | SHIPPING AUTHORIZATIONS | 2 Years |
| Finance | Procurement | 382 | UNSUCCESSFUL BIDS AND PROPOSALS | 2 Years |
| Finance | Procurement | 383 | CREDIT CARDS - List of Employees with Credit Cards | 2 Years |
| Finance | Procurement | 384 | VENDORS - Buyer's Edit List, Vendor Lists | 2 Years |

Revenue Management

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| Finance | Revenue Management | 294 | FEE & TAX REVIEWS - (such as Landfill Tax, Transient Occupancy Taxes, Utility Users Taxes) - Support Documentation (Forms, Reports, Spreadsheets), Reports | 10 Years |
| Finance | Revenue Management | 297 | SMALL CLAIMS COURT RECORDS - Collection Documentation | Final Payment Received+4 Years |
| Finance | Revenue Management | 298 | RECEIVABLES - Vouchers, Payment Batches and Support Documentation (Forms, Reports, Spreadsheets) | Final Payment Received+4 Years |
| Finance | Revenue Management | 309 | LOANS - Documentation for monies loaned by the City, Applications, Payment Schedules, Approvals | Final Payment+4 Years |
| Finance | Revenue Management | 318 | BUSINESS TAX - Applications, Exemptions, Business Tax Close Out Files (for Firms no longer in Business) | 4 Years |
| Finance | Revenue Management | 319 | ASSESSMENTS - Support Documentation (Spreadsheets, Fee Schedules, Memos), Assignment of Fees, Rates | Final Payment+4 Years |
| Finance | Revenue Management | 320 | ASSESSMENTS - Assessor Maps, Annexation Documents | PERMANENT |
| Finance | Revenue Management | 326 | SANITARY AND STORM SEWER BILLING AND ASSESSMENT - System Reports, File Maintenance, Annexation Reports and Maps, Payment Files, Refund Logs, Accounts Receivable Files and Reconciliations, Tax Roll Reports | 4 Years |
| Finance | Revenue Management | 731 | UTILITY RECEIVABLE DOCUMENTS - Copies of documents sent to customers regarding billing for City utility services (water, sewer, and garbage pickup) including but not limited to invoices, late payment notices, notices of intent to record or assess garbage liens, and correspondence. | 3 Years |
| Finance | Revenue Management | 732 | BUSINESS TAX DOCUMENTS - Copies of documents sent to customers regarding business tax assessment and collection including but not limited to invoices, late payment notices, delinquency notices, tax certificates, regulatory permits, and correspondence. | Current + 2 Years |

Fire

| | | Series # | Title and Description | Retention |
|--|-----------------------------------|----------|--|-------------------------------|
| Bureau of Administrative Services | | | | |
| Fire | Bureau of Administrative Services | 751 | EMPLOYEE EXPOSURE DATABASE - Records of exposure of Department employees to toxic substances. | Term of Employment + 30 Years |
| Fire | Bureau of Administrative Services | 752 | OFFICIAL DIRECTIVES - Special Bulletins, Special Orders, Safety Notices | No longer in effect + 5 Years |
| Fire | Bureau of Administrative Services | 754 | RECRUITMENT FILES, SELECTED CANDIDATES - Records documenting the successful recruitment of sworn employees including but not limited to FF recruit process, background investigations, polygraph reports, psychological reports, personal history questionnaires, and applications. | Term of Employment + 3 years |
| Fire | Bureau of Administrative Services | 755 | RECRUITMENT FILES, NON-SELECTED CANDIDATES - Records documenting recruitment efforts not resulting in hiring, including but not limited to FF recruit process, background investigations, polygraph reports, psychological reports, personal history questionnaires, and applications. | End date of list +3 years |
| Fire | Bureau of Administrative Services | 756 | DAILY OIL AND GAS REPORTS - Daily reports of oil and gas supplies. | 2 Year |
| Fire | Bureau of Administrative Services | 757 | SERVICE COMPLAINTS - Documentation of complaints and Department responses including but not limited to correspondence, emails, and complaint logs. | 2 Years |
| Fire | Bureau of Administrative Services | 758 | TIMEKEEPING RECORDS - Employee time management records including but not limited to work schedules, tour trades, time-off requests, and sign-out sheets. | 2 Years |
| Bureau of Field Operations | | | | |
| Fire | Bureau of Field Operations | 759 | SPECIAL OPERATIONS RECORDS - Records documenting training and preparation for special operations including but not limited to Airport Rescue Firefighting, Urban Search and Rescue, Hazards Incidents Team, and Station training and certifications. | 5 Years |

City of San Jose Records Retention Schedule

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|------|----------------------------|-----|--|-----------------------------|
| Fire | Bureau of Field Operations | 760 | EDUCATION & TRAINING RECORDS, SWORN PERSONNEL - Records documenting completion of specialized training by sworn personnel, including but not limited to evaluations and certificates. | Term of Employment+ 5 Years |
| Fire | Bureau of Field Operations | 761 | EDUCATION & TRAINING RECORDS, GENERAL - Records of routine training sessions, workshops, and other events, including but not limited to station training reports, testing, course materials, registration, agenda and registration. | 5 Years |
| Fire | Bureau of Field Operations | 762 | HYDRANT INVENTORY AND INSPECTION RECORDS - Inventories of hydrants and records of periodic inspections of them. | 4 Years |
| Fire | Bureau of Field Operations | 763 | INCIDENT RECORDS - Records documenting fires and other incidents and responses by the department, including but not limited to reports, follow-up, correspondence and other communications. Excludes records of incidents involving hazardous materials. | 10 Years |
| Fire | Bureau of Field Operations | 764 | INCIDENT RECORDS, HAZARDOUS MATERIAL (HAZMAT) - Records documenting incidents involving hazardous materials, including but not limited to reports, follow-ups, and correspondence. | 30 Years |
| Fire | Bureau of Field Operations | 765 | PARAMEDIC RECORDS - Records documenting medical care provided to patients by paramedics, including but not limited to Patient Contact Reports, EMT Reports, Defibrillator Logs, and Patient Medical Releases. | 7 Years |
| Fire | Bureau of Field Operations | 766 | CONTROLLED SUBSTANCES INVENTORIES (EMS) - Inventories of controlled substances (drugs) used for emergency medical responses. | 2 Years |
| Fire | Bureau of Field Operations | 767 | STATION LOG BOOKS - Daily records of station activity, calls and responses, staff involved, date, location, and type of incident. | PERMANENT |

Bureau of Fire Prevention

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|------|---------------------------|-----|---|-----------------------------|
| Fire | Bureau of Fire Prevention | 768 | ARCHITECTURAL ENGINEER REVIEWS - Records documenting the review of applications for building permits, including approvals/ denials, correspondence, Correction Requests, site plans, sprinkler plans, and alarm plans | Life of Structure + 3 years |
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City of San Jose Records Retention Schedule

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| Fire | Bureau of Fire Prevention | 769 | CALIFORNIA FIRE INCIDENT REPORTING SYSTEM - Records relating to participation in the California Fire Incident Reporting System including but not limited to logs, support documentation, and reports. | Report Submitted+5 Years |
| Fire | Bureau of Fire Prevention | 770 | FIRE INSPECTION RECORDS, NON-HAZARDOUS MATERIALS - Fire inspections of structures not requiring Hazardous Materials Permits. | Life of the Structure - minimum of 2 years |
| Fire | Bureau of Fire Prevention | 771 | HAZARDOUS MATERIALS (HAZMAT) FILES - Records relating to City regulation of hazardous materials storage including but not limited to inspections, variances, certificates, supporting documentation, and underground storage permits, inventories, and listings. | PERMANENT |
| Fire | Bureau of Fire Prevention | 772 | FIRE INVESTIGATIONS - Records of investigations of arson and non-arson fires including but not limited to reports, notes, exhibits, photographs, drawings, descriptions, and other supporting documentation. | 10 Years |
| Fire | Bureau of Fire Prevention | 773 | SPECIAL EVENT RECORDS - Records documenting fire prevention regulation of special events including but not limited to inspection reports and permits. | 4 Years |

Bureau of Strategic Support

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|------|-----------------------------|-----|---|-----------------------------------|
| Fire | Bureau of Strategic Support | 774 | COMPUTER AIDED DISPATCH (CAD) DATA - Data gathered regarding calls for assistance, the dispatch of emergency units in response, and resulting field response. Used for analysis of response times and other statistics. | 10 Years |
| Fire | Bureau of Strategic Support | 775 | ENGINEERING STUDY FINAL REPORTS - Final reports of engineering studies on subjects including but not limited to service impacts, site studies, response time evaluations, and zone building blocks. | PERMANENT |
| Fire | Bureau of Strategic Support | 776 | ENGINEERING STUDY SUPPORT DOCUMENTATION - Records created and compiled during the research, analysis, and writing of Engineering Study Final Reports. | Submittal of Final Report+5 Years |
| Fire | Bureau of Strategic Support | 777 | FIT TEST RECORDS - Records of leakage rates of face pieces for Self-Contained Breathing Apparatus by employee and signed records of passed fit test per employee. | 2 Years |

Office of Fire Chief

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|------|----------------------|-----|---|---------------------------|
| Fire | Office of Fire Chief | 778 | SAFETY EDUCATION & TRAINING COURSEWARE - Materials such as handouts, audio-visual presentations, booklets, and tests used to provide training to staff on safety issues. | Superseded + 2 Years |
| Fire | Office of Fire Chief | 779 | SAFETY EDUCATION & TRAINING ATTENDANCE RECORDS - Records documenting the attendance of individual staff members at Safety Education and Training events. | End of Employment+5 Years |
| Fire | Office of Fire Chief | 780 | INCIDENT SCENE SAFETY OFFICER RECORDS - Records created by Incident Scene Safety Officers documenting adherence to safety procedures by staff at incidents to which the Department has responded, including but not limited to correspondence, reports, and follow-ups. | 5 Years |
| Fire | Office of Fire Chief | 781 | ACCIDENT INVESTIGATION REPORTS - Report forms completed by supervisors documenting facts pertinent to injury accidents involving Fire Department staff, including facts about the injury but mostly in regard to the accident: location, work shift, personal safety equipment used, activity engaged in at the time, cause of accident, weather factors, preventative corrective actions, and a narrative description of the accident. | 10 Years |
| Fire | Office of Fire Chief | 782 | SAFETY AND HEALTH STATISTICS - Statistical reports derived from data gathered regarding safety and health issues. | 10 Years |
| Fire | Office of Fire Chief | 783 | VEHICLE ACCIDENT RECORDS - Reports of employee vehicular accidents and supervisor accident injury profiles | 5 Years |

Emergency Services

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|------|--------------------|-----|--|---|
| Fire | Emergency Services | 680 | EMERGENCY OPERATIONS PLAN - Master plan intended to provide guidance for City response to extraordinary emergency situations associated with natural and human-caused disasters. | Retain 5 Years after substantive revisions EXCEPT retain any version of an EOP employed during an actual major emergency PERMANENTLY. |
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City of San Jose Records Retention Schedule

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| Fire | Emergency Services | 681 | EMERGENCY RESPONSE RECORDS - Records documenting the City's response to extraordinary emergency situations associated with natural and human-caused disasters. | PERMANENT |
| Fire | Emergency Services | 682 | EMERGENCY MANAGEMENT PROGRAM AND PROJECT ADMINISTRATION RECORDS - Records documenting the development and administration of emergency management programs and projects, whether funded by federal/state grants or not, such as equipment purchases, preparedness exercises, public education, video lending library, Radio Amateur Civil Emergency Service (RACES), and brochure development. Documents include but are not limited to grant applications, reports, correspondence, emails, plans, proposals, presentations, memoranda, and any materials that may be required during an audit. | 3 Years or (if applicable) Final Report + 3 Years |

General Services

| | | Series # | Title and Description | Retention |
|---------------------------------|--------------------------|----------|---|--------------------------|
| Animal Care and Services | | | | |
| General Services | Animal Care and Services | 901 | LICENSING - Applications, Rabies Certificates | 3 Years |
| General Services | Animal Care and Services | 902 | ANIMAL CONTACT - Reports and Records of Animals Picked Up and Secured, Dead Animal Collection Records, Correspondence, Noisy Animal Complaint Forms, Documented Follow-Up, Logs, Citations, Investigations, Hearing Decisions | 5 Years |
| General Services | Animal Care and Services | 903 | ANIMAL ATTACKS - Reports, Notification Forms, Correspondence, Recommendations, Follow Up Documentation, Quarantine Forms, Code Enforcement Case Files, Criminal Investigations | 5 Years |
| General Services | Animal Care and Services | 904 | ANIMAL SHELTER - Adoption Applications, Impound Forms, Owner Surrender Forms, Lost & Found Records, Spay/Neuter Release Forms, Micro-chip I.D. Form, Animal Behavior Profiles | 5 Years |
| General Services | Animal Care and Services | 905 | ANIMAL SHELTER - Chameleon Database - Animal Medical Records, Adoption Information, Dispatch Records, Animal Control Officer Activity Records, Owner Information, Victim Information, Animal Information, Bite Information | 5 years |
| General Services | Animal Care and Services | 906 | FOSTER RESCUE PROGRAM - Contracts | Term of Contract+3 Years |
| General Services | Animal Care and Services | 907 | RIDE ALONG PROGRAM - Program Plans, Waivers, Reports | 2 Years |
| General Services | Animal Care and Services | 908 | SPAY/NEUTER PROGRAM - Applications, Vouchers | 3 Years |
| General Services | Animal Care and Services | 909 | FINANCIAL BACKUP - Revenue Summary Sheets, Receipts, Veterinary Invoices | 4 Years |

Administration

| | | | | |
|------------------|----------------|-----|---|----------------------|
| General Services | Administration | 331 | DEPARTMENTAL REPORTS - Bimonthly, Quarterly, Annual | 2 Years |
| General Services | Administration | 332 | DAILY ACTIVITY REPORTS | 2 Years |
| General Services | Administration | 333 | FUNDING - Grant Documents, Receipts (monies received from auctions, surplus sales) | Final Report+3 Years |
| General Services | Administration | 334 | BILLING RECORDS - Copy Services, Postage | 2 Years |
| General Services | Administration | 335 | POSTAGE - Private Carriers, Messenger Services, Meter Records | 2 Years |
| General Services | Administration | 336 | COST ANALYSIS - Analyst Records of Equipment Cost Per Hour, Materials Cost Figures, Labor Costs, Inventories, Replacement Figures | 2 Years |
| General Services | Administration | 337 | SAFETY - Shop Safety, Carcinogen Registration, Noise Pollution Correspondence | 2 Years |
| General Services | Administration | 338 | SAFETY, HAZMAT CERTIFICATION OF EMPLOYEES | PERM |
| General Services | Administration | 339 | SAFETY, ASBESTOS EXPOSURE | 30 Years |
| General Services | Administration | 340 | SAFETY COMMITTEE - Minutes, Reports | 5 Years |

Fleet and Equipment

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|------------------|---------------------|-----|--|-------------------------|
| General Services | Fleet and Equipment | 346 | VEHICLE / EQUIPMENT - Inspections, Maintenance, Leases, Equipment Certification, Equipment History, Registrations, Work Orders, Vehicle Titles, Specifications | Life of Vehicle+2 Years |
| General Services | Fleet and Equipment | 347 | VEHICLE / EQUIPMENT - Insurance and Warranties | Term+2 Years |
| General Services | Fleet and Equipment | 348 | FUEL USAGE - Gasoline, Diesel, Oil, Coolants, - Gas Tags, Calibrations, Receipts, Inventories, Logs | 2 Years |
| General Services | Fleet and Equipment | 349 | VEHICLE ASSIGNMENTS - Driver Identity Cards, Assignments | 2 Years |
| General Services | Fleet and Equipment | 350 | DMV RECORDS, CLASS B EMPLOYEE LIST - Class "B" Employee List | Superseded+2 Years |

City of San Jose Records Retention Schedule

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|------------------|---------------------|-----|---|---------------------|
| General Services | Fleet and Equipment | 351 | DMV RECORDS, LICENSES - License Plate Records, Lost License Plates, Licenses and Permits, Certificates | Term+4 Years |
| General Services | Fleet and Equipment | 352 | DMV AUDITS - Annual Reports and Audits of Emergency Vehicle Regular Inspections | 10 Years |
| General Services | Fleet and Equipment | 353 | VEHICLE / EQUIPMENT REPLACEMENT - Replacement Cycle List, Auctions, Requests for Change of Equipment Status, Vehicle Cleaning Records | 2 Years |
| General Services | Fleet and Equipment | 354 | VEHICLE / EQUIPMENT REPLACEMENT - Vehicle Pool Inventories, Automotive Parts Inventories | Superseded |
| General Services | Fleet and Equipment | 355 | VEHICLE ACCIDENTS - Reports, Repairs, Damage Assessments | Case Closed+5 Years |
| General Services | Fleet and Equipment | 356 | APPARATUS DAILY & MONTHLY INSPECTIONS | 2 Years |
| General Services | Fleet and Equipment | 357 | FLEET DATABASE | Superseded |

Facilities Management

| | | | | |
|------------------|-----------------------|-----|---|---------------------------|
| General Services | Facilities Management | 358 | WORK ORDERS - Requests for Service, Cost Sheets, Logs | 2 Years |
| General Services | Facilities Management | 359 | FACILITIES - Plans and Drawings, As-Builts, Repair Records | Life of Structure+2 Years |
| General Services | Facilities Management | 360 | FACILITIES - Facility Inventories | Superseded+2 Years |
| General Services | Facilities Management | 361 | MAINTENANCE RECORDS - Custodial Services, Regular Maintenance, Checklists, HVAC Records, Keys, Security System, Rosters, Pest Extermination | 2 Years |
| General Services | Facilities Management | 362 | EQUIPMENT - Nonvehicular - Repair Records, Operating Manuals | Life of Equipment+2 Years |
| General Services | Facilities Management | 363 | EQUIPMENT - Nonvehicular (Radios, Tools, Cleaning Equipment, etc.) - Inventories, Replacement Schedules | Superseded+2 Years |
| General Services | Facilities Management | 364 | MATERIAL SAFETY DATA SHEETS | 30 Years |
| General Services | Facilities Management | 365 | SAFETY - Shop Safety, Carcinogen Registration, Noise Pollution Correspondence | 2 Years |

Real Estate

| | | | | |
|------------------|-------------|-----|---|---|
| General Services | Real Estate | 627 | REAL PROPERTY, ACQUISITIONS | PERMANENT |
| General Services | Real Estate | 628 | RELOCATION - 30 & 90 Day Notices, Relocation Referrals, Relocation Plans, Claims, Expenses, Negotiations | PERMANENT |
| General Services | Real Estate | 629 | APPRAISALS - (Land Not Purchased) - Preliminary Site Selection Cost Validation, Appraisal | PERMANENT |
| General Services | Real Estate | 630 | PROPERTY DISPUTES - Claims, Correspondence, Cases | PERMANENT |
| General Services | Real Estate | 631 | TITLE REPORTS | PERMANENT |
| General Services | Real Estate | 632 | TELECOMMUNICATIONS CONTRACTS - Active assignments and contracts for placement of privately owned telecommunications equipment on City-owned property; correspondence, agreements currently under negotiation and executed contracts which have not expired | 2 Years following termination of contract |
| General Services | Real Estate | 633 | TELECOMMUNICATIONS CONTRACTS - Terminated/expired assignments and contracts for placement of privately owned telecommunications equipment on City-owned property with all facilities since removed from City property; correspondence and agreements/contract | 2 Years following termination of contract |
| General Services | Real Estate | 634 | PROPERTY RELATED CORRESPONDENCE - Acquisition, Appraisal, City Attorney, City Manager, Council Memos, General Information, Redevelopment Agency and Relocation. | 3 Years |

Housing

| | | Series # | Title and Description | Retention |
|---|------------------------------------|----------|---|--|
| Administration | | | | |
| Housing | Administration | 188 | HOUSING DEPARTMENT REPORTS - Internal | 2 years |
| Housing | Administration | 189 | HOUSING DEPARTMENT REPORTS - Official | PERMANENT |
| Housing | Administration | 190 | ACCOUNTS PAYABLE DISBURSEMENTS | Longer of life of Loan or Affordability Restrictions + 2 Years |
| Housing | Administration | 194 | DENIED TRANSACTIONS | 2 Years |
| Community Development Block Grants | | | | |
| Housing | Community Development Block Grants | 195 | CDBG PROGRAM - Approved Grants | Final Payment + 15 Years |
| Housing | Community Development Block Grants | 196 | CDBG PROGRAM - Denied Grants | 3 Years |
| Housing | Community Development Block Grants | 197 | CDBG PROGRAM - Program Audits | Final Report Issued + 3 Years |
| Homeless Services | | | | |
| Housing | Homeless Services | 191 | CLIENT REFERRAL FORMS | 3 Years |
| Housing | Homeless Services | 192 | GRANTS - ESG, HOPWA, Housing Trust Fund and other HUD and City Programs | Term of contract + 4 Years |
| Loan Management | | | | |
| Housing | Loan Management | 204 | LOAN MONITORING & COMPLIANCE - Project Development, Single Family and Rehabilitation Construction | 3 Years |

City of San Jose Records Retention Schedule

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|---------|-----------------|-----|---------------------|---|
| Housing | Loan Management | 205 | LEGAL CUSTODY FILES | Longer of life of Loan or Affordability Restrictions + 12 Years |
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|---------|-----------------|-----|---------------------|---|
| Housing | Loan Management | 206 | SINGLE FAMILY LOANS | Longer of life of Loan or Affordability Restrictions + 12 Years |
|---------|-----------------|-----|---------------------|---|

Project Development

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|---------|---------------------|-----|------------------------|---|
| Housing | Project Development | 208 | CONSTRUCTION DOCUMENTS | Completion of Project + 10 Years after Notice of Completion |
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| Housing | Project Development | 209 | PROJECT DEVELOPMENT, LOAN UNDERWRITING | Longer of life of Loan, Grant or Affordability Resstrictions + 4 years |
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| Housing | Project Development | 210 | PROJECT DEVELOPMENT, OUTSIDE FUNDING | Life of Loan, Grant or Affordability Restrictions + 5 Years |
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| Housing | Project Development | 211 | PROJECT DEVELOPMENT, ADMINISTRATIVE | Longer of life of Loan, Grant or Affordability Restrictions |
|---------|---------------------|-----|-------------------------------------|---|

Rehabilitation

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|---------|----------------|-----|--|--|
| Housing | Rehabilitation | 212 | REHAB SINGLE FAMILY LOANS - Underwriting | Longer of life of Loan or Affordability Restrictions + 4 Years |
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| Housing | Rehabilitation | 213 | REHAB GRANTS | Completion of project + 4 Years |
|---------|----------------|-----|--------------|---------------------------------|

Relocation

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|---------|------------|-----|----------------------|-------------------------|
| Housing | Relocation | 214 | PERMANENT RELOCATION | Final Payment + 3 Years |
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|---------|------------|-----|----------------------|------------------------|
| Housing | Relocation | 215 | TEMPORARY RELOCATION | Final Report + 3 Years |
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| Housing | Relocation | 216 | FINANCIALS - Relocation | Final Report + 3 Years |
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Rental Rights & Referrals Program

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|---------|-----------------------------------|-----|----------------------|-----------|
| Housing | Rental Rights & Referrals Program | 199 | SETTLEMENT DECISIONS | PERMANENT |
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City of San Jose Records Retention Schedule

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|---------|-----------------------------------|-----|------------------------------|-----------------------|
| Housing | Rental Rights & Referrals Program | 200 | CASE FILES | Case Closed + 5 Years |
| Housing | Rental Rights & Referrals Program | 202 | ANNUAL FEE EXEMPTIONS | 2 Years |
| Housing | Rental Rights & Referrals Program | 203 | MOBILEHOMES LONG TERM LEASES | Life of Lease |

Human Resources

| | | Series # | Title and Description | Retention |
|----------------------|---------------|----------|--|-----------------------------|
| All Divisions | | | | |
| Human Resources | All Divisions | 461 | EMPLOYEE SURVEYS | 2 Years |
| Human Resources | All Divisions | 462 | EMPLOYEE SERVICES / PAYROLL SYSTEM, PEOPLE SOFT - PeopleSoft | PERMANENT |
| Human Resources | All Divisions | 463 | EMPLOYEE SERVICES / PAYROLL SYSTEM , PPC - PPC Personnel System | PERMANENT |
| Benefits | | | | |
| Human Resources | Benefits | 464 | COMMUNICATION FILES - Employee Handbook, Plan Descriptions, Rate Sheets, Fact Sheets, EAP Communication Flyers, Insurance Certificates | PERMANENT |
| Human Resources | Benefits | 465 | PLANS - Medical, Dental, Vision, Life, Health In-Lieu, Long Term Care - Plans, Transaction Forms, Transaction Forms | Term of Plan+4 Years |
| Human Resources | Benefits | 466 | BENEFIT TRACKING, COBRAR APPLICATIONS - Cobra Applications | 6 Years |
| Human Resources | Benefits | 467 | BENEFIT TRACKING, COBRA TRACKING DATABASE - Cobra Tracking Database | COBRA plus 6 years |
| Human Resources | Benefits | 468 | CATASTROPHIC ILLNESS TIME DONATION - Applications, Approvals, Donations, Conversions | 2 Years |
| Human Resources | Benefits | 469 | EMPLOYEE ASSISTANCE PROGRAM - Counseling Case Files, Mediation Case Files, Drug Treatment Invoices | 2 Years |
| Human Resources | Benefits | 470 | POLICIES - Provider and Consultant | Term of Contract+4 Years |
| Human Resources | Benefits | 471 | PERSONNEL BENEFIT FILES - Forms and Certificates (Insurance Enrollment and Cancellation, Proof of Alternate Coverage, Marriage, Divorce, Dependent Children Affidavit, Drop & Add Dependent, Legal Guardianship or Adoption, Deferral Change, Beneficiary) | Term of Employment+10 Years |

City of San Jose Records Retention Schedule

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|-----------------|----------|-----|---|------------------------|
| Human Resources | Benefits | 472 | CLAIMS, LONG TERM DISABILITY - Long Term Disability | Term of Claim+30 Years |
| Human Resources | Benefits | 473 | CLAIMS, LIFE INSURANCE - Life Insurance | 4 Years |
| Human Resources | Benefits | 474 | CLAIMS, PERSONNEL ACCIDENT INSURANCE - Personnel Accident Insurance | 2 Years |
| Human Resources | Benefits | 475 | REPORTS - Performance, Utilization, Activity | 4 Years |
| Human Resources | Benefits | 476 | UNEMPLOYMENT INSURANCE - Quarterly Wage Reports, Billings, Fund Transfers, Invoices | 4 Years |

Compensation

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|-----------------|--------------|-----|---|----------|
| Human Resources | Compensation | 477 | COMPENSATION & STUDIES - incl. Reallocation and job analysis documentation, pay equity studies and related salary surveys, and other related data and analysis documents | 5 Years |
| Human Resources | Compensation | 478 | MAJOR (MULTIPLE CASE) COMPENSATION & CLASSIFICATION STUDY SUMMARY DOCUMENTS - recommendations, summary data on class/pay changes, and applicable Council/Commission memos | 10 years |
| Human Resources | Compensation | 479 | CLASSIFICATION SPECIFICATIONS | 5 years |
| Human Resources | Compensation | 480 | PAY PLANS | 15 Years |

Deferred Compensation

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|-----------------|-----------------------|-----|--|--------------------|
| Human Resources | Deferred Compensation | 481 | Quarterly financial reports, annual investment review, payroll interfaces | 10 years |
| Human Resources | Deferred Compensation | 482 | DEFERRED COMPENSATION COMMITTEE - Agendas, Minutes | PERMANENT |
| Human Resources | Deferred Compensation | 483 | Deferred Comp plan enrollments, contribution & investment changes, distribution requests | 10 years |
| Human Resources | Deferred Compensation | 484 | 457 Plan documents: Voluntary and PTC plans | Superseded+2 Years |

Employment

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|-----------------|------------|-----|--|------------------------------|
| Human Resources | Employment | 485 | PERSONNEL FILES - Full-Time, Part-Time - Personnel Action Notices (Appointment, Separation, etc), Appraisals, Employee Record Mod. Requests, Name Change Forms, Management Performance Forms, Leave Forms (Family, Medical, Military, etc), Exit Checklist | Term of Employment+10 Years |
| Human Resources | Employment | 486 | PERSONNEL FILES - Hourly Employees, Seasonal Employees - Exit Checklist | Term+5 Years |
| Human Resources | Employment | 487 | PERSONNEL FILES - TempU, Rehire of Retirees - Appointments, Appraisals, Memos, Exit Checklist | Term+5 Years |
| Human Resources | Employment | 488 | POSITION / SECTION CHANGES - Completed Forms | 2 Years |
| Human Resources | Employment | 489 | EXIT INTERVIEWS - Completed Interview Forms | 2 Years |
| Human Resources | Employment | 490 | I-9 FORMS - Less than 3 Years employment | later of hire date + 3 years |
| Human Resources | Employment | 491 | I-9 FORMS - 3+ years employment | Termination+1 Year |
| Human Resources | Employment | 492 | NEW EMPLOYEE ORIENTATION - Packet, Presentation | 2 Years |
| Human Resources | Employment | 493 | PARKING PERMITS - Applications, Logs | 2 Years |

Health and Safety

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|-----------------|-------------------|-----|---|-----------------------------|
| Human Resources | Health and Safety | 494 | EMPLOYEE MEDICAL FILES - Fitness for Duty Evaluations, Physicals, Pre-employment Medical History (not hired) statements and exams | Term of Employment+30 Years |
| Human Resources | Health and Safety | 495 | HEALTH SERVICES TRACKING SYSTEM | Term of Employment+30 Years |
| Human Resources | Health and Safety | 496 | ERGONOMICS - Evaluations, Equipment Orders | 10 years |
| Human Resources | Health and Safety | 497 | RETURN-TO-WORK - Completed Forms, Correspondence | 5 Years |

City of San Jose Records Retention Schedule

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|--------------------|-------------------|-----|---|--------------------------------|
| Human Resources | Health and Safety | 498 | SAFETY OFFICER RECORDS - Injury and accident investigation reports, correspondence, notices | 2 Years |
| Human Resources | Health and Safety | 499 | SAFETY COMMITTEE - Agendas, Minutes, Packets | 2 Years |
| Human Resources | Health and Safety | 500 | INJURY & ILLNESS PREVENTION PLANS (IIPP) | Current Version+1 Version Back |
| Human Resources | Health and Safety | 501 | HAZARDOUS IDENTIFICATION AND CONTROL - Databases - Hazards, Information & Corrections | 3 Years |
| Human Resources | Health and Safety | 502 | REGULATORY COMPLIANCE - Reports, Correspondence, Surveillance Documents | 5 Years |
| Human Resources | Health and Safety | 503 | OSHA COMPLIANCE - Inspections & Audits | 5 Years |
| Human Resources | Health and Safety | 504 | DRIVERS - Drivers' Log, Certification, Driver Proficiency, Drug-Alcohol Testing, Copies of Licenses | 4 Years |
| Human Resources | Health and Safety | 505 | EMPLOYEE DOT DRUG TEST RECORDS, NEGATIVE AND CANCELLED TESTS - Negative and Cancelled Tests | 2 Years |
| Human Resources | Health and Safety | 506 | EMPLOYEE DOT DRUG TEST RECORDS - Positive Tests, Refusals, EBT Calibrations, SAP Evaluations and Referrals, Retesting Requests, Notices | 5 Years |
| Human Resources | Health and Safety | 507 | EMPLOYEE DOT DRUG TEST RECORDS COLLECTION RECORDS - Collection Records | 2 Years |
| Human Resources | Health and Safety | 508 | CITY DRIVING PERMITS | Term of Employment+2 Years |
| Human Resources | Health and Safety | 509 | FMLA MEDICAL CERTIFICATION | 6 years |
| Recruitment | | | | |
| Human Resources | Recruitment | 510 | APPLICATIONS, RESUMES - Not Hired | 2 Years |
| Human Resources | Recruitment | 511 | TESTING - Oral Boards, Interview Questions, Applicant Screening and Assessments, Proctor's Instructions | 2 Years |

City of San Jose Records Retention Schedule

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|------------------------|-----------------|-----|--|------------------------------|
| Human Resources | Recruitment | 512 | ELIGIBLE LISTS, QUALIFIED CANDIDATES GROUPS - Applications/resumes, eligible lists/qualified candidate group spreadsheets, requisition forms, certification forms | 2 Years |
| Human Resources | Recruitment | 513 | APPLICANT TRACKING DATABASE (TRAC) - Applicant status, notification, test results, test scoring, eligible lists, reinstatements lists, employee summary history | PERMANENT |
| Human Resources | Recruitment | 514 | JOB REQUESTS - Temporary Unclassified | 2 years from expiration date |
| Human Resources | Recruitment | 515 | ON-LINE APPLICATIONS SYSTEM (Quick Hire) | permanent |
| Human Resources | Recruitment | 516 | POSITION SPECIFIC ASSESSMENT RECORDS - Assessment plan, application/supplemental questionnaire rating sheets, interview questions, rating sheets, rater notes, reference check forms, record of candidate notification, offer letter | 2 Years |
| Human Resources | Recruitment | 517 | EXAMINATION HISTORY RECORDS - job analysis, written examinations and answer keys, written exam item analyses, oral/practical exams and scoring criteria, proctor instructions, TRAC Scoring reports, correspondence regarding issues pertaining to recruitment | 5 years |
| Human Resources | Recruitment | 518 | APPLICANT FLOW DATA - ethnic/gender distribution of test results | 5 years |
| Risk Management | | | | |
| Human Resources | Risk Management | 323 | PROPERTY & LIABILITY INSURANCE - City Policies | PERMANENT |
| Human Resources | Risk Management | 324 | PROPERTY & LIABILITY INSURANCE - Subrogation Files | Last Payment+4 Years |
| Human Resources | Risk Management | 325 | PROPERTY & LIABILITY INSURANCE - Certificates of Insurance | Term of Contract+20 Years |
| Training | | | | |
| Human Resources | Training | 519 | CATALOGS - Listing of Classes Offered to City Employees | PERMANENT |

City of San Jose Records Retention Schedule

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|-----------------|----------|-----|---|-----------|
| Human Resources | Training | 520 | PLANNING - Needs Assessments, Training Plans, Standards, Curriculum | 2 Years |
| Human Resources | Training | 521 | COURSE MATERIALS - Videos, DVDs, audio | 10 years |
| Human Resources | Training | 522 | TRAINING REGISTRATION DATABASES | PERMANENT |

Workers Compensation

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|-----------------|----------------------|-----|--|----------------------|
| Human Resources | Workers Compensation | 523 | WORKERS' COMPENSATION - Claims - Applications, Payment Records, Release to Work | File Closed+10 Years |
| Human Resources | Workers Compensation | 524 | WORKERS' COMPENSATION - Future Medical Awards | File Closed+10 Years |
| Human Resources | Workers Compensation | 525 | WORKERS' COMPENSATION - Misc. items to include: RFPs, Audits, Actuarial Studies | 10 years |
| Human Resources | Workers Compensation | 526 | WORKERS' COMPENSATION INFORMATION SYSTEM - database containing all Workers' Compensation cases | PERMANENT |

Independent Police Auditor

| | Series # | Title and Description | Retention |
|----------------------------|----------|---|------------------------|
| ALL | | | |
| Independent Police Auditor | ALL | 177 INVESTIGATION FILES, CITIZEN COMPLAINTS - Citizen Complaints, Investigation Documentation, Final Reports | Case Resolved+6 Years |
| Independent Police Auditor | ALL | 178 INVESTIGATION FILES, OFFICER INVOLVED SHOOTINGS - Police Officer Involved Shootings - Complaints, Investigation Documentation, Final Report | Case Resolved+10 Years |
| Independent Police Auditor | ALL | 179 DATABASE- Tracks and Monitors the Implementation of the Recommendations by Internal Police Auditor | Case Resolved+10 Years |
| Independent Police Auditor | ALL | 180 PUBLIC REPORTS - Reports of Investigations that are Available to the Public | 10 Years |
| Independent Police Auditor | ALL | 181 YEAR END REPORTS - Summary of the Trends, Recommendations and Findings for a Year | PERMANENT |
| Independent Police Auditor | ALL | 182 REPORTS - Quarterly or Midyear Reports | 5 Years |
| Independent Police Auditor | ALL | 183 NEWSLETTERS - Midyear and Year End | PERMANENT |
| Independent Police Auditor | ALL | 184 COMMUNITY OUTREACH - Correspondence with Citizen Groups, Presentations, Speaker Notes | 5 Years |
| Independent Police Auditor | ALL | 185 POLICE DEPARTMENT AUDIT - Annual Operational Audit | PERMANENT |
| Independent Police Auditor | ALL | 186 STUDIES - Statistical Analysis Studies and Reports, Surveys (External and Internal) | 10 Years |

Information Technology

| | Series # | Title and Description | Retention |
|------------------------|----------|--|----------------------------------|
| ALL | | | |
| Information Technology | ALL | 683 USAGE AND MONITORING RECORDS - Records documenting details and/or summaries of the use of City computer resources including login files, system usage, and internet usage. | 2 Years |
| Information Technology | ALL | 684 USER ACCESS RECORDS - Records indicating levels of access permitted to individual users and groups of users. | Superseded or Obsolete + 2 Years |
| Information Technology | ALL | 685 DISASTER PREPARATION AND RECOVERY PLANS - Plans detailing steps for responses to and recovery from disasters and threatened or actual loss of data. | Superseded or Obsolete + 2 Years |
| Information Technology | ALL | 686 INFORMATION TECHNOLOGY MASTER PLAN - Plan used to guide overall direction and development of information technology for the City. | Superseded or Obsolete + 5 Years |
| Information Technology | ALL | 687 HARDWARE AND SOFTWARE DOCUMENTATION AND MAINTENANCE RECORDS - Manuals, warranties, maintenance logs, and any other records documenting the operation and use of IT hardware and software. Excludes documentation of repairs on end user computers and any other equipment located in department offices. | No Longer in Use + 2 Years |
| Information Technology | ALL | 688 SYSTEM AND DATA DOCUMENTATION - Records documenting systems and data including but not limited to network diagrams, data dictionaries, flow charts, specifications, file layouts, source code, metadata, configurations, system change notices, and security records. | Superseded or Obsolete + 2 Years |
| Information Technology | ALL | 689 TELEPHONE BILLING RECORDS - Telephone bills received and paid by the Information Technology Department. Does not include cellular telephone billing records--see Citywide General Schedule series #245. | 4 Years |
| Information Technology | ALL | 690 HARDWARE AND SOFTWARE INVENTORY RECORDS - Running inventories of hardware and software used to track locations, to whom assigned, and licensing information. | Superseded + 2 Years |

City of San Jose Records Retention Schedule

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| Information Technology | ALL | 691 | DESIGN AND IMPLEMENTATION PROJECT FILES - Records created during the design and implementation of information technology systems and applications including but not limited to schedules, plans, tracking, analyses, proposals, draft documentation, evaluations and test results. | Obsolete + 2 Years |
| Information Technology | ALL | 692 | HARDWARE, SOFTWARE, AND SERVICES SELECTION AND ACQUISITION RECORDS - Records documenting all activities related to the selection and acquisition of IT equipment, software, and services including but not limited to requests for assistance from departments, research, approval requests, requests for information or proposals, proposal evaluations, non-disclosure forms, conflict of interest forms, and approvals. | 4 Years |
| Information Technology | ALL | 693 | INFORMATION TECHNOLOGY SERVICE REQUEST AND RESPONSE RECORDS - Records documenting requests for IT helpdesk, Call Center, and other services and the responses thereto, including but not limited to helpdesk tickets, request tracking information, communications, and descriptions/reports of services provided. | 2 Years |

Library

| | Series # | Title and Description | Retention |
|---------|----------|---|--|
| Library | 1121 | LIBRARY CARD RECORDS - Records of library cards issued to patrons. | Last card activity + 2 Years |
| Library | 1122 | DEBT COLLECTION MANAGEMENT - Records documenting activities associated with the collection of debts such as overdue fines. | Retain until fine is collected or 2 years, whichever is longer. |
| Library | 1123 | PUBLIC PROGRAMMING RECORDS - Records documenting the development and administration of programs for the public including but not limited to programs for children, adults, students, parents, teachers, seniors and other segments of the population. Does NOT include any records required to retained as documentation of grant funded activities or contract performance. | 2 Years |
| Library | 1124 | COLLECTION MOVEMENT RECORDS - Records documenting the physical movement of materials between facilities (inter-branch), drop-off locations, and storage areas. | 2 Years |
| Library | 1125 | DONATION RECORDS, NON-MONETARY - Records documenting the donation, acceptance, and management of non-monetary items such as books, records, photographic and audio-visual materials, artifacts, equipment, and intellectual property, including but not limited to donation forms, correspondence, agreements, appraisals, care and preservation documents, and accessioning documents. | Retain as long as donated item is retained or 2 years whichever is longer. |
| Library | 1126 | FACILITY DEVELOPMENT AND FUNDING - Records documenting the development and implementation of plans to construct, renovate, or modify facilities, including securing of funding sources. Does NOT include any record copies of documents needed to document contract performance or structural integrity (see Citywide General Schedule series #169) | Completion of project + 5 Years |

City of San Jose Records Retention Schedule

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| Library | 1127 | INTERNET DOMAIN NAME REGISTRATION AND MAINTENANCE RECORDS - Records documenting the registration and maintenance of the Department web site domain names. | Expiration/renewal or 2 years whichever is longer. |
| Library | 1128 | INFORMATION TECHNOLOGY MANAGEMENT RECORDS - Records documenting the management of departmental information technology. | Retain in accordance with IT Department retention schedule. |
| Library | 1129 | COLLECTION DEVELOPMENT RECORDS - Records documenting the selection and acquisition of new materials for the Library's collections excluding actual purchasing records (see Citywide General Series #170 Procurement and Purchasing Records).. | 2 Years |

Mayor

| | Series # | Title and Description | Retention |
|------------|----------|--|--------------------------------------|
| ALL | | | |
| Mayor | ALL | 850 AUDIO-VISUAL RECORDS - Photographs, video, and other AV materials not maintained elsewhere in other City offices. | PERMANENT |
| Mayor | ALL | 851 CALENDARS AND SCHEDULES - Records documenting upcoming and past events regarding the activities of the Mayor and senior staff. | End of Term(s) + 2 Years |
| Mayor | ALL | 852 PROJECTS/ISSUES - Records pertaining to specific projects or issues, including but not limited to correspondence, emails, memos, reports, plans, notes, and reference materials. | PERMANENT |
| Mayor | ALL | 853 GENERAL CORRESPONDENCE - Communications, including attachments, excluding documents that are covered under other records series (e.g., Constituent Services), to and from individuals and organizations both within and without City government. | PERMANENT |
| Mayor | ALL | 854 SUBJECT REFERENCE FILES - Informational materials including but not limited to clippings, brochures and pamphlets, copies of reports or other records for which the record copy is maintained elsewhere, and other items retained solely for reference value. | Until No Longer Useful for Reference |
| Mayor | ALL | 855 MEETINGS - Documents compiled or received in preparation for or during meetings of the City Council, Committees, or other official bodies, including but not limited to copies of notices, agenda, minutes, ordinances, resolutions, contracts, memoranda, reports, and reference materials. | Until No Longer Useful for Reference |
| Mayor | ALL | 856 APPOINTMENTS - Records documenting the search for and appointment of individuals to serve on commissions, task forces, and other volunteer organizations. | End of Term(s) + 2 Years |
| Mayor | ALL | 857 PROCLAMATIONS, SPEECHES, ADDRESSES, AND PRESENTATIONS - Text of formal proclamations, speeches, addresses, and presentations by the Mayor. | PERMANENT |

City of San Jose Records Retention Schedule

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| Mayor | ALL | 858 | INVITATIONS - Invitations received by the Office of the Mayor. | 2 Years |
| Mayor | ALL | 859 | CONSTITUENT SERVICES - Correspondence with constituents regarding specific complaints, requests for service, or other issues not including Public Records Act requests. | End of Term(s) + 2 Years |
| Mayor | ALL | 860 | POLICY AND LEGISLATIVE DEVELOPMENT - Documents created and/or compiled during the development of new or revised policies and/or legislation. | PERMANENT |

Parks Recreation & Neighborhood Service

| | Series # | Title and Description | Retention |
|--|----------------|---|---|
| Administration | | | |
| Parks Recreation & Neighborhood Services | Administration | 910 COMMISSIONS - Agendas, Minutes, Reports, Recommendations- | PERMANENT |
| Parks Recreation & Neighborhood Services | Administration | 911 COMMITTEES - Agendas, Minutes, Reports, Recommendations | 8 Years |
| Parks Recreation & Neighborhood Services | Administration | 912 FEE SCHEDULES | 4 years |
| Parks Recreation & Neighborhood Services | Administration | 913 FUTURE TEACHER LOANS - Approved - Applications, Correspondence, Background Verifications, Award Letters, Records of Payments | Loan Paid+4 Years |
| Parks Recreation & Neighborhood Services | Administration | 914 FUTURE TEACHER LOANS - Denied - Applications, Correspondence, Background Verifications | 2 Years |
| Parks Recreation & Neighborhood Services | Administration | 915 RECEIVABLES - Deposits, Cash Receipts, Payments for Reservations, Cash Summary Logs, Fees (Entrance, Parking, Use), Cash Vouchers, Vending Machine Revenue, Video Machine Revenue | 1 Year |
| Parks Recreation & Neighborhood Services | Administration | 916 GRANT MANAGEMENT - Funds Received - Applications, Proposals Submitted, Reports, Correspondence, Approvals | Final Report+3 Years or as otherwise provided in the grant document |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Administration | 917 | GRANTS ADMINISTRATION - Funds Donated - Applications, Award Letters, Check Requests, Copies of Checks, Reports Received from Recipients, Correspondence | Final Payment+5 Years |
| Parks Recreation & Neighborhood Services | Administration | 918 | HEALTHY NEIGHBORHOODS VENTURE FUNDS - Program Plans | Term+2 Years |
| Parks Recreation & Neighborhood Services | Administration | 919 | HEALTHY NEIGHBORHOODS VENTURE FUNDS - Service Grants Approved - Applications, Agreements, Tracking of Payments, Goal Measures, Activity Reporting, Award Letters, Background Information Received (Due Diligence) | Final Payment+ 5 Years |
| Parks Recreation & Neighborhood Services | Administration | 920 | HEALTHY NEIGHBORHOODS VENTURE FUNDS - Program Audits - Workpapers, Report of Recommendations, Follow-up Documentation | Audit+7 Years |
| Parks Recreation & Neighborhood Services | Administration | 921 | DEPARTMENT TIMECARDS - Part-time Employee Timecards | 7 Years |
| Parks Recreation & Neighborhood Services | Administration | 922 | MAILING LISTS - Citizens, Government Agencies, Community Groups, Project Contacts | 2 years |
| Parks Recreation & Neighborhood Services | Administration | 923 | PROJECTS - Notes, Task Lists, Timelines, Reports, Schedules, Background Materials, Work Orders, Logs, Data Management, Surveys | Completion of Project+2 Years |
| Parks Recreation & Neighborhood Services | Administration | 924 | OUTREACH COORDINATORS - List of Support Services, Correspondence with Providers, Contact List, Program Files | 2 Years |
| Parks Recreation & Neighborhood Services | Administration | 925 | ACCIDENTS - Logs, Follow-up Documentation, Appeals, Correspondence, Investigation Notes and Reports, Visitor Accident Forms and Reports | 5 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Administration | 926 | INCIDENT REPORTS - Incidents Involving Visitors to the Parks, Written Reports Regarding Park Concerns | 5 Years |
| Parks Recreation & Neighborhood Services | Administration | 927 | COMPLAINTS & CONCERNS - Written Complaints, Responses, Correspondence | 2 Years |
| Parks Recreation & Neighborhood Services | Administration | 928 | TAXES - Reports and Approvals, Revenue Collected, Allocation Reports | 5 Years |
| Parks Recreation & Neighborhood Services | Administration | 929 | USAGE STATISTICS & REPORTS | 5 Years |
| Parks Recreation & Neighborhood Services | Administration | 930 | YOUTH EMPLOYMENT SERVICES - List of Participating Businesses, Correspondence, Job Announcements, Career Fair Documents, Workshop Materials, Workshop Sign-up Sheets | 3 Years |
| Parks Recreation & Neighborhood Services | Administration | 931 | YOUTH EMPLOYMENT SERVICES - Career Counseling Files, Job Placement Files, Applications, Resumes, Aptitude Testing, Certificates of Completion | 3 Years |
| Parks Recreation & Neighborhood Services | Administration | 932 | VOLUNTEER PROGRAMS - Complaints, Schedules, Weekly Logs, Sign-In Sheets, Project Lists, Memos, Expense Reimbursements, Training Schedules, Training Registrations | 2 Years |
| Parks Recreation & Neighborhood Services | Administration | 933 | VOLUNTEER PROGRAMS - Waivers, Applications, Key Logs | Length of Service+2 Years |
| Parks Recreation & Neighborhood Services | Administration | 934 | VOLUNTEER PROGRAMS - List of Volunteers and Emergency Contacts, Database of Participants | Length of Service+2 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Administration | 935 | SPECIAL EVENTS - Schedules, Participant Lists, Correspondence, Notices, Announcements, Expenses, Agreements, Sponsorships, Donations | 5 Years |
| Parks Recreation & Neighborhood Services | Administration | 936 | CHRISTMAS IN PARK - Committee - Agendas, Minutes, Agreements | 5 Years |
| Parks Recreation & Neighborhood Services | Administration | 937 | PROGRAMS - Work Plans, Correspondence, Training, Notes, Schedules, Program Reports | 2 Years |
| Parks Recreation & Neighborhood Services | Administration | 938 | NEIGHBORHOOD MEETINGS - Agendas, Correspondence, Notes, Minutes, Follow-up Reports, Written Documentation Received from Community | 3 Years |
| Parks Recreation & Neighborhood Services | Administration | 939 | PROGRAMS OFFERED - Announcements, Calendars, Catalogs, Class Changes, Notifications, Rosters, Sign-In Sheets, Reservations, Waivers, Vouchers, Scholarships | 2 Years |

Community Facilities Development

| | | | | |
|--|----------------------------------|-----|---|-----------|
| Parks Recreation & Neighborhood Services | Community Facilities Development | 940 | MASTER PLANS - Parks, Trails, Community Centers, Regional Parks - Final Master Plans, Maps, Drawings, Photographs | PERMANENT |
| Parks Recreation & Neighborhood Services | Community Facilities Development | 941 | GREENPRINT - Long Range Plan, Needs Assessment, Strategy Development | PERMANENT |
| Parks Recreation & Neighborhood Services | Community Facilities Development | 942 | PROPOSALS - New Park Project Proposals, Feasibility Studies | 20 years |
| Parks Recreation & Neighborhood Services | Community Facilities Development | 943 | CAPITAL BUDGET - Budget Work Sheets, Calculations, Spreadsheets, Analysis Reports | 5 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Community Facilities Development | 944 | COMMUNITY FACILITIES DEVELOPMENT - Developer Information | 6 Years |
| Parks Recreation & Neighborhood Services | Community Facilities Development | 945 | COMMUNITY MEETINGS - Notices, Agendas, Minutes, Notes, Correspondence | 2 Years |
| Parks Recreation & Neighborhood Services | Community Facilities Development | 946 | PARK DEDICATION IMPACT INFORMATION | 5 Years |
| Parks Recreation & Neighborhood Services | Community Facilities Development | 947 | PARK DEDICATION IMPACT INFORMATION - Parkland Agreements | Term + 5 years |
| Parks Recreation & Neighborhood Services | Community Facilities Development | 948 | REGIONAL PARKS - Notes, Background Documents, Reports, Correspondence | 5 Years |
| Community Services | | | | |
| Parks Recreation & Neighborhood Services | Community Services | 949 | OFFICE ON AGING - Reports, Referrals, Rosters, Schedules, Sign-In Sheets, Waivers, Training, Expense Reimbursements | 4 years |
| Parks Recreation & Neighborhood Services | Community Services | 950 | OFFICE ON AGING - Participant Lists, Business Partner Lists, Volunteer Lists, Educational Courses, Job Listings | 2 years |
| Parks Recreation & Neighborhood Services | Community Services | 951 | OFFICE ON AGING - Municipal Health Services Program - Contracts, Statistics, Reimbursements | Final Expenditure + 5 years |
| Parks Recreation & Neighborhood Services | Community Services | 952 | RECREATIONAL CENTERS - Staffing Schedules, Transportation Schedules, Visitor/Attendee Sheets, Special Events Calendars and Notices, Brochures | 2 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Community Services | 953 | NUTRITION PROGRAM - Menus, Records of Foods Purchased and Used, Meal Counts | 5 Years |
| Parks Recreation & Neighborhood Services | Community Services | 954 | GIFT SHOPS - Inventories, Receipts, Deposits, Shipping Receipts, Purchase Orders, Flyers, Work Schedules, Donations | 4 Years |
| Parks Recreation & Neighborhood Services | Community Services | 955 | RESERVATIONS - Facility, Fields, Courts, Equipment - Reservations, Scheduling, Fees Collected, Work Orders, Rental Agreements | 2 Years |
| Parks Recreation & Neighborhood Services | Community Services | 956 | RECREATION EVENTS/CLASSES - Registration, Announcements and Flyers, Volunteer Lists, Teacher Lists, Waivers | 2 Years |
| Parks Recreation & Neighborhood Services | Community Services | 957 | RECREATION EVENTS/CLASSES - Electronic Recreation System Database | 2 Years |
| Parks Recreation & Neighborhood Services | Community Services | 958 | SPORTS & THERAPEUTIC PROGRAMS - Schedules, Registrations, Tournament Rosters, Equipment Inventories, Purchase Orders | 2 Years |
| Parks Recreation & Neighborhood Services | Community Services | 959 | SPORTS PROGRAMS - Referee Contracts | Term of Contract+3 Years |
| Parks Recreation & Neighborhood Services | Community Services | 960 | MAYOR'S GANG PREVENTION TASK FORCE - Notes, Correspondence, Recommendations, Work Plans, Proposals | 4 Years |
| Parks Recreation & Neighborhood Services | Community Services | 961 | RIGHT CONNECTION PROGRAM - Program Documentation and Plans, Correspondence, Notifications, Logs of Incidents, Response Reports | 3 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Community Services | 962 | YOUTH INTERVENTION SERVICES - Counseling - Referrals, Providers List, Participants | 3 Years |
| Parks Recreation & Neighborhood Services | Community Services | 963 | ABUSE REPORTING - Reports, Follow-up Documentation, Evaluations, Contact Reports | 5 Years |
| Parks Recreation & Neighborhood Services | Community Services | 964 | PRNS EVENTS - Flyers, Booth Reservations, Coordination Records | 4 Years |
| Parks Recreation & Neighborhood Services | Community Services | 965 | SAFE SCHOOLS CAMPUS INITIATIVE & HEALTHY STUDENTS - Services, Contacts, Complaints, Schedules, Incident Management Reports, Notifications, Correspondence, Follow-up, Remediation Recommendations, Implementation, Work Requests | 2 Years |
| Parks Recreation & Neighborhood Services | Community Services | 966 | SAFE SCHOOLS CAMPUS INITIATIVE - Response Plans, Emergency Contingency Plans | Term+2 Years |
| Parks Recreation & Neighborhood Services | Community Services | 967 | SAFE SCHOOLS PROGRAM - Response Training Records, Rosters, Sign-In Sheets, Notifications, Access Logs | 3 Years |
| Parks Recreation & Neighborhood Services | Community Services | 968 | YOUTH CENTERS - Hours of Operation Schedules, Volunteer Schedules, Volunteer Lists, Donation Records, Work Schedules, Sponsorships, Activities, Waivers, Sign-In Sheets, Correspondence | 2 Years |
| Parks Recreation & Neighborhood Services | Community Services | 969 | YOUTH INTERVENTION PROGRAMS - Program Documentation, List of Resources and Services, Correspondence, Referrals, Contact Forms, Reports, Follow- up Documentation | 3 Years |

Parks - Regional, Neighborhood, Special Facilities

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 970 | PROGRAMS - FARMS, ZOOS, PARKS - Registrations, Schedule of Events, Work Schedules, Volunteer Lists, Training Class Material, Roster of Attendees, Sign-In Sheets, Parent Release Forms, Waivers, Fees Collected | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 971 | FARMS/ZOOS- Animals Sales and Donations, Receipts, Waivers, Exchanges | 4 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 972 | FARMS/ZOOS - Dead Animal Records, Disposal Records | 5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 973 | FARMS/ZOOS - Husbandry Records, Veterinarian Records, Animal Health Records, Feed Records | Life of Animal+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 974 | FARMS - Agreement with 4-H Club for Animal Care | Term of Agreement+3 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 975 | FARMS/ZOOS - Docent Training, Staff Keeper Aide Training, Registration, Sign-In Sheets | Length of Service+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 976 | FARMS/ZOOS - Docent Schedules | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 977 | ZOOS - Happy Hollow Corporation Agreement | Term of Agreement+3 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 978 | PARKS / GOLF COURSES / GARDENS - Use Fees, Reservations, Schedules, Receipts, Insurance, Tournament Schedules, Participant Lists, Landscape Maintenance, Water Usage Records, Equipment Rentals | 2 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 979 | PARKS / GOLF COURSES / GARDENS, LANDSCAPE PLANS | Term+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 980 | PARK RANGER MANAGEMENT RECORDS - Trails Assessments, Trails Actions, Monitoring Reports, Ranger Daily Logs, Roster of All Park Rangers, Program Files | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 981 | YOUTH SCIENCE INSTITUTE - Annual Reports to City per agreement | Term of Agreement+3 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 982 | SURVEYS - Customer, Zip Code | 5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 983 | CONCESSIONS - Food & Equipment Inventories, DHS Inspection Reports, Remediation Action, Correspondence, Work Schedules, Cleaning Logs, Repair Schedules, Sales Receipts, Sales Reports | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 984 | FAMILY CAMP - Registrations, Applications, Funding, Receipts for Payment, Schedules, Permissions, Waivers, Insurance for Participants, Food Logs/Inventories, Notices, Attendance Records | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 985 | GIFT SHOPS - Inventories, Receipts, Deposits, Shipping Receipts and Labels, Purchase Orders, Adoption Certificates, Promotionals, Flyers | 4 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 986 | FIRST AID STATIONS - Inventories of Supplies, Waivers, Signature Sheets for Medicine | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 987 | PARK RANGERS - Pre-Hire Background Checks - Hired and Not Hired | 7 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 988 | NEW EMPLOYEES - Equipment Assignments, Key List | Length of Assignment+4 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 989 | ENVIRONMENTAL HEALTH - Asbestos - Asbestos Testing, Reporting, Follow-up, Findings, Recommendations, Remediation, Notifications for all Park Facilities | 30 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 990 | ENVIRONMENTAL HEALTH - Audits, Internal Inspections, Findings and Recommendations, Reports | Term + 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 991 | ENVIRONMENTAL HEALTH - Backflow Reports | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 992 | ENVIRONMENTAL HEALTH - FIFRA Exemption Letters or Variances | Term of Exemption+5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 993 | ENVIRONMENTAL HEALTH - Prop 65 Exemption Letters, TSCA Exemption Letters | Term of Exemption+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 994 | INSPECTIONS - Playground Inspection Forms and Reports, Fire Extinguisher Inspection Forms and Reports, Park Regular Safety Checks | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 995 | INSPECTIONS - Regulating Agencies Correspondence, Reports, Recommendations | Completion of Recommendations+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 996 | NATURAL RESOURCES MANAGEMENT - Quarterly & Annual Reports to Fish and Game Agency, Interaction Reports, Domestic Waterfowl Control Documentation, Animal Control Documentation | 2 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 997 | NATURAL RESOURCES MANAGEMENT - Vegetation Management, Routine Maintenance Schedules, Correspondence, Monitoring Reports | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 998 | LAKES - Water Testing, Quality Checks, Reports, Water Level Checks, Septic Tank Check Reports, Maintenance | 5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 999 | LAKES - Notifications | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1000 | WATER - Public Water Monitoring and Testing Data | 30 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1001 | WATER - Storm Water Monitoring and Runoff - Field Data Forms, Reports | 5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1002 | PERMITS - Parks, Golf Courses, Gardens, Zoos - Alcohol Beverage, Wastewater, Irrigation Discharge, Fish & Game, Development | Term of Permit+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1003 | PESTICIDE APPLICATORS PROFESSIONAL ASSOCIATION - Licenses, Training Logs | Term+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1004 | PESTICIDES - Chemicals Used at Facilities and on Park Grounds - Storage, MSDS, Disposal, Profiles | 30 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1005 | PESTICIDES - Inventories, Spraying Schedules, Purchase Authorizations, Inspections, Manifests, Permits and Material Plans | 5 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1006 | PESTICIDES - Training Logs, Licenses, Medical Waivers, Pesticide Control Applicator Cards | 5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1007 | SAFETY MEETINGS - Tailgate Safety Training, Biweekly Meetings | 5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1008 | FACILITIES - Facility Inventories | 15 years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1009 | FACILITIES MAINTENANCE RECORDS - Custodial Services, Regular Maintenance, Routine Building and Equipment Inspections, Checklists, HVAC Records, Key Logs, Rosters, Pest Extermination | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1010 | FACILITIES - Plans and Drawings, As-Builts, Repair Records | Life of Structure+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1011 | FACILITIES - Work Orders - Requests for Service, Cost Sheets, Logs | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1012 | EQUIPMENT - Apparatus Daily & Monthly Inspections | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1013 | EQUIPMENT - Repair Records, Operating Manuals, Maintenance Manuals, Annual Maintenance Reports | Life of Equipment+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1014 | VEHICLE ASSIGNMENTS - Driver Identity Cards, Assignments | 2 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1015 | VEHICLES - DMV Records - License Plate Records, Lost License Plates, Licenses and Permits, Certificates | Term+4 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1016 | VEHICLES - Accidents - Reports, Repairs, Damage Assessments | Case Closed+5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1017 | ANTI-GRAFITTI - Paint Supply Logs, Phone Logs of Requests, Applications, Schedules, Permission from Private Property Owners, Volunteer Lists, Training Records | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1018 | PARKS USE - Permits, Deposits, Applications, Insurance and Deposit Receipts, Health Permits, Special Uses Notifications | Term of Permit+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1019 | COMMUNITY MEETINGS - Notices, Agendas, Public Comments | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1020 | PROGRAMS - Registrations, Schedule of Events, Work Schedules, Volunteer Lists, Training Class Material, Roster of Attendees, Sign-In Sheets, Parent Release Forms, Waivers, Fees Collected, Records of Assigned Plots for Gardens | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1021 | CAPITAL PROJECTS/RENOVATIONS - Schedules, Funding Receipts, Tracking of Expenses, Notices, Correspondence, Work Required and List of Activities | Completion+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1022 | FACILITIES - Key Logs, Equipment Inventories | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1023 | INSPECTIONS - Fire Extinguisher Inspection Forms and Reports | 2 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1024 | SAFETY MEETINGS - Tailgate Safety Training, Biweekly Meetings | 5 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1025 | ENVIRONMENTAL HEALTH - Asbestos - Asbestos Testing, Reporting, Follow-up, Findings, Recommendations, Remediation, Notifications for all Park Facilities | 30 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1026 | ENVIRONMENTAL HEALTH - Audits, Internal Inspections, Findings and Recommendations, Reports | 2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1027 | NATURAL RESOURCES MANAGEMENT - Vegetation Management, Routine Maintenance Schedules, Correspondence, Tree Monitoring Checks | Term of contract + 2 years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1028 | NATURAL RESOURCE MANAGEMENT - Quarterly and Annual Reports to Fish and Game Agency, Interaction Reports, Domestic Waterfowl Control Documentation, Animal Control Documentation | Term of contract + 2 years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1029 | NATURAL RESOURCE MANAGEMENT - Fish & Game Permits | Expiration Date+2 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1030 | WATER - Public Water Monitoring and Testing Data | 30 Years |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1031 | WATER - Soil and Ground Water Testing Results and Reports | PERMANENT |
| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1032 | WATER - Storm Water Monitoring and Runoff - Field Data Forms, Reports | 5 Years |

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| Parks Recreation & Neighborhood Services | Parks - Regional, Neighborhood, Special Facilities | 1033 | WATER RIGHTS - Documentation | PERMANENT |
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Parks and Civic Grounds Management

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| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1034 | WORK ORDERS - Requests for Service, Cost Sheets, Logs, Repairs, Maintenance | 2 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1035 | TECHNICIAN'S LOG | 2 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1036 | PESTICIDES - Training Logs, Licenses, Medical Waivers, Pesticide Control Applicator Cards | 5 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1037 | PESTICIDES - Storage, MSDS, Disposal, Profiles | 30 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1038 | PESTICIDES - Inventories, Spraying Schedules, Purchase Authorizations, Inspections, Manifests, Permits and Material Plans | 5 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1039 | HAZARDOUS MATERIALS - Inspection Violation Reports | 5 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1040 | PESTICIDE APPLICATORS PROFESSIONAL ASSOCIATION - Licenses, Training Logs | Term+2 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1041 | EQUIPMENT - Nonvehicular - Repair Schedules, Operating Manuals, Replacement Schedules | Life of Equipment+2 Years |

City of San Jose Records Retention Schedule

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| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1042 | EQUIPMENT - Nonvehicular (Lawn Mowers, Weed Sprayers, Hedgers, etc.) - Asset Inventories | Life of Equipment+2 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1043 | HORTICULTURIST DOCUMENTS - Tree Inventories, Complaints, Work Schedules, Pruning, Planting, Stump Removal | 2 Years |
| Parks Recreation & Neighborhood Services | Parks and Civic Grounds Management | 1044 | PARK DESIGN - Landscaping, Blueprints, Specifications, Markings, Signs | PERMANENT |

Planning Building and Code Enforcement

| | | Series # | Title and Description | Retention |
|--|----------|----------|---|----------------------------|
| Building | | | | |
| Planning Building and Code Enforcement | Building | 580 | BUILDING FILES - Documentation on every structure for which the City issues a building permit, including but not limited to Approved Applications, Permits, Plans, Evaluations, Plan checks, Alternate Materials, Non-Conforming Uses, Inspections, Complaints, Correspondence, Reports, Violations and Solutions, Correction Notices, Ledgers, Certificates of Occupancy, Condemnations, and Closures. | Life of Structure +2 Years |
| Planning Building and Code Enforcement | Building | 581 | PLAN CHECKS, NO PERMIT ISSUED - Building permit applications that have been approved, but for which the applicant did not complete the application process and for which no permit was issued. | 2 Years |
| Planning Building and Code Enforcement | Building | 582 | BUILDING PERMIT APPLICATIONS, DENIED - Building permit applications received but were denied approval. | 5 Years |
| Planning Building and Code Enforcement | Building | 583 | SOIL REPORTS - Records of analysis of soil from proposed building sites. | PERMANENT |
| Planning Building and Code Enforcement | Building | 584 | BUILDING DEMOLITION FILES - Records documenting the demolition of buildings including but not limited to correspondence and permits. | 15 Years |
| Planning Building and Code Enforcement | Building | 585 | APPEALED ENFORCEMENT CASE FILES - Inspection cases appealed to the Appeals Hearing Board including but not limited to reports, decisions, correspondence, and supporting documentation. | Life of Structure +2 Years |
| Planning Building and Code Enforcement | Building | 586 | STATISTICS, CITATIONS GIVEN - Statistics of Sites Inspected, Citations Given, Appeals Heard | 5 Years |

City of San Jose Records Retention Schedule

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| Planning Building and Code Enforcement | Building | 587 | STREETS / NUMERIC ADDRESSING / TRACT MAPS - Records documenting the naming and numbering of streets and addresses. | PERMANENT |
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Code Enforcement

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| Planning Building and Code Enforcement | Code Enforcement | 589 | CASE FILES - Inspections, Complaints, Correspondence, Reports, Violations, Correction Notices, Photos, Administrative Citations (not appealed) | Case Closure + 2 Years |
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| Planning Building and Code Enforcement | Code Enforcement | 590 | CODE ENFORCEMENT SYSTEM DATABASE - Inspections, Complaints, Coorespondence, Reports, Violations, Correction Notices | PERMANENT |
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| Planning Building and Code Enforcement | Code Enforcement | 591 | CODE ENFORCEMENT PHOTOGRAPHS - Digital images in the Code Enforcement System database. | Closure + 5 Years |
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| Planning Building and Code Enforcement | Code Enforcement | 592 | CITATIONS - Administrative Citations (appealed Citation only), Criminal Citations (Citation and associated case file) | Closure + 5 Years |
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| Planning Building and Code Enforcement | Code Enforcement | 593 | APPEALS HEARING BOARD - Cases, Resolutions, Agendas, Synopsis, Minutes, Packets, and Hearing Files | PERMANENT |
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| Planning Building and Code Enforcement | Code Enforcement | 594 | APPEALS / HEARING OFFICER - Written decisions on appeals of Administrative Citations by the San Jose Hearing Officer | PERMANENT |
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| Planning Building and Code Enforcement | Code Enforcement | 595 | STATISTICS, CITATIONS ISSUED - Statistics of Sites Inspected, Citations Issued, Appeals Heard | PERMANENT |
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| Planning Building and Code Enforcement | Code Enforcement | 596 | PERMITS - Multiple Housing Occupancy Permits, Off-Sale Alcohol, Abandoned Cart, Auto Dismantler, Auto Body, Waste Tire Program Renewals, Modifications and Changes | PERMANENT |
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City of San Jose Records Retention Schedule

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| Planning Building and Code Enforcement | Code Enforcement | 597 | SOLID WASTE FACILITY PERMITS - Revisions, Amendments | PERMANENT |
| Planning Building and Code Enforcement | Code Enforcement | 598 | RECORDS - Certification, Correspondence, Training and other CIWMB required documentation | PERMANENT |
| Planning Building and Code Enforcement | Code Enforcement | 599 | APPEALS / INDEPENDENT HEARING PANEL - Cases, Resolutions, Agendas, Synopsis, Minutes, Packets and Hearing Files | PERMANENT |

Planning

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| Planning Building and Code Enforcement | Planning | 650 | PLANNING DATA AND PROJECTION FILES - Records of projections of growth related activities in the City including but not limited to Construction Activity Projections, Vacant Land Inventory, Census Projections | PERMANENT |
| Planning Building and Code Enforcement | Planning | 651 | GENERAL PLAN FILES - Records constituting the City's General Plan including but not limited to General Plan Amendments, Elements, Horizon 2000, 1987 Special General Plan Review, General Plan 2020, General Plan interpretations, Inter-City Jurisdictions; Boundary Adjustments. | PERMANENT |
| Planning Building and Code Enforcement | Planning | 652 | AREA SPECIFIC PLANS - Published plans providing detailed information about specific neighborhoods or other geographic areas within the borders of the General Plan. Includes Strong Neighborhood Initiative plans. | Retain 1 Copy PERMANENTLY |
| Planning Building and Code Enforcement | Planning | 653 | PLAN WORKING FILES - Records produced during the creation of plans including but not limited to outlines, internal correspondence, notes, calculations, research materials, maps, and audio-visual materials, but excluding any drafts that would normally be discarded when superseded or the plan has been finalized. | 2 Years |
| Planning Building and Code Enforcement | Planning | 654 | PLAN IMPLEMENTATION FILES - Records created during the implementation of plans including but not limited to Development Review Procedures, Development Standards, Planned Community Implementation, Preliminary Review proposals, and design guidelines. | 2 years |

City of San Jose Records Retention Schedule

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| Planning Building and Code Enforcement | Planning | 655 | DEVELOPMENT PROJECT FILES, APPROVED - Records created during the review and approval of proposed developments having enduring value for operational and historical research including but not limited to Zonings, Planned Development Permits, ABC Permits, Subdivision Maps, Development Agreements, Annexations, Williamson Act files, Site Development Permits, Conditional and Special Use, Cluster Permits, Exception Permits, TM Permits, Adjustments, and Variances. | PERMANENT |
| Planning Building and Code Enforcement | Planning | 656 | DEVELOPMENT PROJECT FILES, NON-PERMANENT - Records created during the review of proposed developments that do not amend the underlying land use permit and that do not have long-term value for research, including but not limited to Tree Removal (TR) Permits and Administrative Permits. | 2 years |
| Planning Building and Code Enforcement | Planning | 657 | DEVELOPMENT PROJECT FILES, UNAPPROVED - Records created during the review of proposed developments that were not approved including but not limited to various permits and agreements. | 20 Years |
| Planning Building and Code Enforcement | Planning | 658 | ENVIRONMENTAL REVIEW FILES - Records documenting the conduct and results of environmental reviews including but not limited to Public and Private Project Exemptions, Re-uses, Negative Declarations, and Environmental Impact Reports (EIR's). | PERMANENT |
| Planning Building and Code Enforcement | Planning | 659 | PROPERTY STATUS CORRESPONDENCE - Correspondence to public inquiries documenting the status of a particular property, including but not limited to Legal Non-Conforming Letters, ABC Letters, DMV Letters, Comprehensive Research Letters, RSL Letters (Basic Zoning & GP / Burn Down / Massage) | 10 Years |
| Planning Building and Code Enforcement | Planning | 660 | HISTORIC PRESERVATION FILES - Records related to the preservation and management of historic sites and structures including but not limited to Historic Landmark Designations, Historic Preservation Permits, Historic Property Contracts, Historic Survey Files, Historic Inventory, Historic Landmark Commission Synopses | PERMANENT |

Police

| | | Series # | Title and Description | Retention |
|-----------------------------------|----------------------------|----------|---|---------------------|
| Bureau of Field Operations | | | | |
| Police | Bureau of Field Operations | 31 | BOMB SQUAD, ACTIVITY LOGS - Activity Logs | 5 Years |
| Police | Bureau of Field Operations | 32 | BOMB SQUAD, CLOSED CASES - Closed Cases | Date Closed+7 Years |
| Police | Bureau of Field Operations | 33 | BOMB SQUAD, OPEN CASES - Open Cases | 10 Years |
| Police | Bureau of Field Operations | 34 | CHIEF'S RECORDS - Watch Commander - Activity Reports, Watch Lists | 2 Years |
| Police | Bureau of Field Operations | 35 | CHIEF'S RECORDS - Watch Commander - District Information, Beat Information | 2 Years |
| Police | Bureau of Field Operations | 36 | CRIME PREVENTION PROGRAMS - Crime Stoppers Files, Ride Along Files, TABS Program (Truancy Abatement), Presentation Requests | 2 Years |
| Police | Bureau of Field Operations | 37 | FIELD TRAINING - Field Training Officer Files, Evaluations | 7 Years |
| Police | Bureau of Field Operations | 38 | FLEET MANAGEMENT - Pursuits / Chase Audio/Video Tapes | 2 Years |
| Police | Bureau of Field Operations | 39 | MAIN LOBBY - Lobby Registration Logs | 2 Years |
| Police | Bureau of Field Operations | 40 | PREPROCESSING CENTER - INTAKE AND SCREENING - (Juvenile and Adult) - Files and Completed Forms, Logs | 5 Years |
| Police | Bureau of Field Operations | 41 | PREPROCESSING CENTER - Surveillance Video Tapes | 14 Months |
| Police | Bureau of Field Operations | 42 | RESERVES - Program Files, Public Relations, Project Files, Community Files | 2 Years |

City of San Jose Records Retention Schedule

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| Police | Bureau of Field Operations | 43 | RESERVES - Volunteers, Shifts, Hours Worked | 2 Years |
| Police | Bureau of Field Operations | 44 | SPECIAL OPERATIONS ACTIVITY LOGS | 2 Years |
| Police | Bureau of Field Operations | 45 | SPECIAL OPERATIONS, K-9 AND HORSE MOUNTED - Training Files, Bite Memos | Until Animal is Retired+7 Years |
| Police | Bureau of Field Operations | 46 | SPECIAL OPERATIONS M.E.R.G.E. TRAINING FILES | Duration of Tour* |
| Police | Bureau of Field Operations | 47 | TRAFFIC - Enforcement / Cruise Management Detail | 2 Years |
| Police | Bureau of Field Operations | 48 | VALTOX LOGS | 5 Years |
| Police | Bureau of Field Operations | 49 | VCET (Violent Crime Enforcement Team) - Activity Logs | 5 Years |
| Police | Bureau of Field Operations | 50 | VCET (Violent Crime Enforcement Team) - Street Gang Files | PERMANENT |
| Police | Bureau of Field Operations | 342 | SPECIAL OPERATIONS, METRO AND GRAFFITI | 10 Years |

Bureau of Administration

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|--------|--------------------------|----|---|---------|
| Police | Bureau of Administration | 51 | FISCAL - AUDIT REPORTS | 7 Years |
| Police | Bureau of Administration | 52 | PERMITS - Applications Rejected including Background Checks | 3 Years |
| Police | Bureau of Administration | 53 | PERMITS - FALSE ALARM INCIDENTS - False Alarm Warning Card Files, Reports | 2 Years |
| Police | Bureau of Administration | 54 | PERMITS - HEARING OFFICER RECORDS - Taxi and Tow Companies | 3 Years |
| Police | Bureau of Administration | 55 | PERMITS - INSPECTION FILES - Taxi and Tow Companies | 2 Years |
| Police | Bureau of Administration | 56 | PERMITS - Massage Parlor Permits - Approved and Denied | 5 Years |

City of San Jose Records Retention Schedule

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|--------|--------------------------|-----|---|---------------------------------------|
| Police | Bureau of Administration | 57 | PERMITS - PERMITS ISSUED/RENEWED ON AN ANNUAL BASIS (Ice Cream Truck, Bicycle License, Tow Driver, Taxi, Entertainment, Special Event, Amusement, Pawnbroker, Towing Company, Firearm Dealer, Funeral Escort, Bingo, Peddler, Concealed Weapon) | 3 Years |
| Police | Bureau of Administration | 58 | PERMITS - Photo Database | Term of Permit+2 Years |
| Police | Bureau of Administration | 59 | PERMITS, SECONDARY EMPLOYMENT EMPLOYEES | 2 Years |
| Police | Bureau of Administration | 60 | PERMITS, SECONDARY EMPLOYMENT EMPLOYERS | 2 Years |
| Police | Bureau of Administration | 61 | PERSONNEL BACKGROUND CHECKS, SWORN HIREDI | Hire Date + 30 Years |
| Police | Bureau of Administration | 62 | PERSONNEL BACKGROUND CHECKS, NON SWORN | Bkg Complete Date + 7 Years |
| Police | Bureau of Administration | 63 | PERSONNEL EMPLOYEE FILES, SWORN | Term of Employment + 20 Years |
| Police | Bureau of Administration | 64 | PERSONNEL FIREARM RANGE TRAINING | Term of Employment+7 Years |
| Police | Bureau of Administration | 65 | PERSONNEL LABOR DISTRIBUTION REPORTS - Statistical Reports of Deployment | 15 Years |
| Police | Bureau of Administration | 66 | PHOTO LAB - PHOTOS - Crime Scenes | 10 Years |
| Police | Bureau of Administration | 67 | PROPERTY - Form 13 - Open and Dead (Reconciled) | 20 Years |
| Police | Bureau of Administration | 68 | PROPERTY - REGISTER LOG - Index Log of Property Taken In and Stored | 20 Years |
| Police | Bureau of Administration | 69 | RESERVES - Candidate Files | Date Eligibility List Expires+7 Years |
| Police | Bureau of Administration | 70 | TRAINING - DEPARTMENT TRAINING RECORDS (All Units) | Term of Employment+7 Years |
| Police | Bureau of Administration | 100 | PERSONNEL EMPLOYEE FILES, NON SWORN - Full time, Part Time, Reserves, Volunteers | Hire Date + 7 Years |
| Police | Bureau of Administration | 187 | PERSONNEL EMPLOYEE FILES INJURY (Sworn and Non-Sworn) | Term of Employment + 7 Years |

Bureau of Investigations

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|--------|--------------------------|----|--|--|
| Police | Bureau of Investigations | 71 | COURT LIAISON, DISTRICT ATTORNEY REJECTION SLIPS - District Attorney Rejection Slips | 2 Years |
| Police | Bureau of Investigations | 72 | COURT LIAISON - Docket Lists, Calendars, Bail Summary, Affidavits for Probable Cause | 2 Years |
| Police | Bureau of Investigations | 73 | COURT LIAISON, EVIDENCE - Property Summary Reports - Open Cases | Disposition+10 Years |
| Police | Bureau of Investigations | 74 | FINANCIAL CRIMES - Pawnbroker Receipts, Tickets | 2 Years |
| Police | Bureau of Investigations | 75 | INVESTIGATIONS, UNDERCOVER EXPENSE LEDGERS | 5 Years |
| Police | Bureau of Investigations | 76 | INVESTIGATIONS, CASE BURN FILES - Case Burn Files - Destruction of Evidence | 8 Years |
| Police | Bureau of Investigations | 77 | INVESTIGATIONS, GENERAL CRIMES PROSECUTED - Case Files - General Crimes - Assault (Except Kidnapping for Ransom / Extortion), Financial (Except Embezzlement, Falsification of Public Records), High-Tech Crimes, Narco Drug Files, Robbery, Motor Vehicle Theft - Criminal Prosecution | Date Closed+5 Years |
| Police | Bureau of Investigations | 78 | INVESTIGATIONS, GENERAL CRIMES NOT PROSECUTED - Case Files - General Crimes - Assault (Except Kidnapping for Ransom / Extortion), Financial (Except Embezzlement, Falsification of Public Records), High-Tech Crimes, Narco Drug Files, Robbery, Motor Vehicle Theft - No Criminal Prosecution | Date Closed+3 Years |
| Police | Bureau of Investigations | 79 | INVESTIGATIONS, ASSAULT UNIT - Case Files - Assault Unit - Kidnapping for Ransom / Extortion, Embezzlement, Falsification of Public Records - Open & Closed Cases | 50 Years |
| Police | Bureau of Investigations | 80 | INVESTIGATIONS, FAMILY VIOLENCE SUBSTANTIATED - Case Files - Family Violence Unit - Child Abuse, Child Neglect - Substantiated Open & Closed Cases | PERMANENT |
| Police | Bureau of Investigations | 81 | INVESTIGATIONS - Case Files - Family Violence Unit - Child Abuse, Child Neglect - Unsubstantiated Open & Closed Cases | Last report received for suspected child abuser + 10 years |

City of San Jose Records Retention Schedule

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|--------|--------------------------|----|--|---------------------|
| Police | Bureau of Investigations | 82 | INVESTIGATIONS, FAMILY VIOLENCE, DOMESTIC VIOLENCE AND ELDER ABUSE/NEGLECT - Case Files - Family Violence Unit - Domestic Violence and Elder Abuse or Neglect - Open & Closed Cases | 10 Years |
| Police | Bureau of Investigations | 83 | INVESTIGATIONS, GANG UNIT CLOSED - Case Files - Gang Unit - Closed Cases | Date Closed+5 Years |
| Police | Bureau of Investigations | 84 | INVESTIGATIONS, GANG UNIT OPEN - Case Files - Gang Unit - Open Cases | 3 Years |
| Police | Bureau of Investigations | 85 | INVESTIGATIONS, HOMICIDE AND OFFICER INVOLVED SHOOTINGS - Case Files - Homicide Unit - Homicide (Not Including Suicide) and Officer Involved Shootings | 50 years |
| Police | Bureau of Investigations | 87 | INVESTIGATIONS, SUICIDE, NO FOLLOW UP - Case Files - Homicide Unit - Suicide and Attempted Suicide Case Files - Closed Cases Officially Determined as Suicide, No Follow Up Required | 20 Years |
| Police | Bureau of Investigations | 88 | INVESTIGATIONS, SUICIDE, UNDER SUSPICION - Case Files - Homicide Unit - Suicide and Attempted Suicide Case Files - Open Cases Under Suspicion, Follow Up Required | 20 Years |
| Police | Bureau of Investigations | 89 | INVESTIGATIONS, MISSING PERSONS CLOSED - Case Files - Missing Persons Unit - Closed Cases | Date Closed+5 Years |
| Police | Bureau of Investigations | 90 | INVESTIGATIONS, MISSING PERSONS OPEN - Case Files - Missing Persons Unit - Open Cases | PERMANENT |
| Police | Bureau of Investigations | 91 | INVESTIGATIONS, CHILD MOLEST SUBSTANTIATED - Case Files - Sexual Assault Unit - Child Molest - Substantiated Cases | PERMANENT |
| Police | Bureau of Investigations | 92 | INVESTIGATIONS, CHILD MOLEST WITH DNA - Case Files - Sexual Assault Unit - Child Molest with DNA - Open & Closed Cases | PERMANENT |
| Police | Bureau of Investigations | 93 | INVESTIGATIONS, SEXUAL ASSAULT EXCEPT CHILD MOLEST - Case Files - Sexual Assault Unit - Sexual Assault (Except Substantiated Child Molest and Child Molest with DNA) - Open & Closed Cases | 20 Years |

City of San Jose Records Retention Schedule

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|--------|--------------------------|-----|--|---------------------|
| Police | Bureau of Investigations | 99 | INVESTIGATIONS, GANGS ACTIVE - Gangs - Information on Gang Activity and Members for CAL-GANG Database - Active | PERMANENT |
| Police | Bureau of Investigations | 101 | INVESTIGATIONS, GANGS INACTIVE - Gangs - Information on Gang Activity and Members for CAL-GANG Database - Inactive | 5 Years |
| Police | Bureau of Investigations | 102 | INVESTIGATIONS, INFORMATION CARD FILES | PERMANENT |
| Police | Bureau of Investigations | 103 | INVESTIGATIONS , NARCOTIC AUDIO TAPE FILES | 5 Years |
| Police | Bureau of Investigations | 104 | INVESTIGATIONS, NARCOTIC UNIT DAILIES - Narcotics Unit - Dailies (Officers' Daily Activities) | 5 Years |
| Police | Bureau of Investigations | 105 | INVESTIGATIONS, SEX REGISTRANT FILES | Life of Registrant |
| Police | Bureau of Investigations | 106 | INVESTIGATIONS, SPECIAL EMPLOYEES UNDERCOVER AGENT FILES | Date Closed+5 Years |
| Police | Bureau of Investigations | 341 | INVESTIGATIONS, NONFATAL ACCIDENTS, NO CRIMINAL PROSECUTION - Traffic Investigations Unit - Nonfatal Accidents, Driving While Under the Influence (DUI), Misdemeanor Hit and Run - No Criminal Prosecution | 3 Years |
| Police | Bureau of Investigations | 344 | INVESTIGATIONS, NONFATAL ACCIDENTS, CRIMINAL PROSECUTION - Traffic Investigations Unit - Nonfatal Accidents, Driving While Under the Influence (DUI), Misdemeanor Hit and Run - Criminal Prosecution | 10 Years |
| Police | Bureau of Investigations | 345 | INVESTIGATIONS, FATAL ACCIDENTS - Traffic Investigations Unit - Fatal Accidents, Felony Hit & Run | 50 years |
| Police | Bureau of Investigations | 694 | WARRANTS UNIT - Completed Extradition Files | 2 Years |
| Police | Bureau of Investigations | 695 | INVESTIGATIONS, AUTO THEFT UNIT - Auto Theft Unit - Vehicle Identification Number (VIN) Checks | 2 Years |

Bureau of Technical Services

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|--------|------------------------------|-----|----------------------------------|--------------|
| Police | Bureau of Technical Services | 107 | COMMUNICATIONS, 911 MASTER TAPES | 14 Months |
| Police | Bureau of Technical Services | 108 | COMMUNICATIONS, FCC LICENSES | Term+2 Years |

City of San Jose Records Retention Schedule

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| Police | Bureau of Technical Services | 109 | COMMUNICATIONS, TELEPHONE RECORDS | 2 Years |
| Police | Bureau of Technical Services | 110 | COMMUNICATIONS, TELEPHONE REPORT AUTOMATION CENTER REPORTS - Report Automation Center (TRAC) Reports | 2 Years |
| Police | Bureau of Technical Services | 111 | OSSD FATAL ACCIDENT PHOTOS AND NEGATIVES | 10 Years |
| Police | Bureau of Technical Services | 112 | OSSD NONFATAL ACCIDENT PHOTOS AND NEGATIVES | 5 Years |
| Police | Bureau of Technical Services | 113 | OSSD BLUE CARD FILES, TRAC Log | 2 Years |
| Police | Bureau of Technical Services | 114 | OSSD TRAFFIC AND CRIMINAL COURT CITATION FILES | 5 Years |
| Police | Bureau of Technical Services | 115 | OSSD FACTUALLY INNOCENT RECORDS - Sealed Factually Innocent Records | Sealed+3 Years |
| Police | Bureau of Technical Services | 116 | OSSD FIELD INTERVIEWS - Cards, Information Gathered in All Formats | 10 Years |
| Police | Bureau of Technical Services | 117 | OSSD FINGERPRINT FILES - Case (Palm) Print Cards, Fingerprint Cards | PERMANENT |
| Police | Bureau of Technical Services | 118 | OSSD FINGERPRINT LATENT LIFT CARDS - Fingerprints Lifted from Crime Scene | PERMANENT |
| Police | Bureau of Technical Services | 119 | OSSD- GUN FILES - Voluntary Registrations | PERMANENT |
| Police | Bureau of Technical Services | 120 | OSSD JUVENILE ARREST AND INVESTIGATION RECORDS, SEALED (Juvenile Sealings) | Date of Petition+5 Years |
| Police | Bureau of Technical Services | 121 | OSSD MICROFICHE - RIS, CAD Event History, Officer Daily and Biweekly Detail Activity | 10 Years |
| Police | Bureau of Technical Services | 122 | OSSD PHOTO DATABASE | PERMANENT |
| Police | Bureau of Technical Services | 123 | OSSD PRIVATE PROPERTY TOW FILES | 2 Years |

City of San Jose Records Retention Schedule

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| Police | Bureau of Technical Services | 124 | OSSD REPORTS (Including Supplemental Reports)- Incident Reports, Offense Reports, Traffic Accident Reports, Juvenile Contact Reports, Abandoned Vehicles, Impounded Vehicles, Stolen Vehicles, Recovered Vehicles, Stolen Plates, DUI, Drunk-In-Public | 10 Years |
| Police | Bureau of Technical Services | 125 | OSSD - REPOSSESSION REPORTS | 2 Years |
| Police | Bureau of Technical Services | 126 | OSSD - RESTRAINING ORDERS | Term of Order |
| Police | Bureau of Technical Services | 127 | OSSD STOLEN GUN FILES, OUTSTANDING | Indefinite |
| Police | Bureau of Technical Services | 128 | OSSD STOLEN GUN FILES, RECOVERED | Date Recovered+10 Years |
| Police | Bureau of Technical Services | 129 | OSSD VEHICLE TRACKING SYSTEM | 2 Years |
| Police | Bureau of Technical Services | 130 | OSSD WARRANTS - Notices to Appear, Warrants Recalled, Cleared Warrants | 3 Years |
| Police | Bureau of Technical Services | 343 | COMMUNICATIONS, POST DISPATCHER FILES - Dispatcher Training Files | Term of Employment + 7 Years |

Chief of Police

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|--------|-----------------|-----|--|---------------------------|
| Police | Chief of Police | 131 | CRIME ANALYSIS ACTIVITY LOGS - Activity Logs | 3 Years |
| Police | Chief of Police | 132 | CRIME ANALYSIS PROJECT FILES - Project Files | 3 Years |
| Police | Chief of Police | 133 | CRIME ANALYSIS, STATISTICAL REPORTS - Crime by Beat Reports, Master Index Reports | PERMANENT |
| Police | Chief of Police | 134 | INTERNAL AFFAIRS, COMPLAINTS - Complaints Against Department Members (Sworn and non-sworn) | Date Received+6 years |
| Police | Chief of Police | 135 | INTERNAL AFFAIRS, POLICE OFFICER INVOLVED ACCIDENTS - Reports, Interviews, Studies | Date of Accident+3 Years |
| Police | Chief of Police | 136 | INTERNAL AFFAIRS, POLICE OFFICER INVOLVED SHOOTINGS - Reports, Interviews, Studies | Date of Incident+10 years |

City of San Jose Records Retention Schedule

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|--------|-----------------|-----|---|------------------------|
| Police | Chief of Police | 137 | RESEARCH & DEVELOPMENT - Grant Files | Final Report+13 Years |
| Police | Chief of Police | 138 | RESEARCH & DEVELOPMENT - Policies, Procedures, Directives, Duty Manuals | PERMANENT |
| Police | Chief of Police | 139 | SPECIAL INVESTIGATIONS, VICE CLOSED CASES | Date Closed+5 Years |
| Police | Chief of Police | 140 | SPECIAL INVESTIGATIONS, VICE OPEN CASES | 3 Years |
| Police | Chief of Police | 141 | SPECIAL INVESTIGATIONS - GAMING, Surveillance Video Log, Table Count, Incident Reports, Background Investigations, Cardroom Permits | PERMANENT |
| Police | Chief of Police | 143 | SPECIAL INVESTIGATIONS, VICE MASSAGE PARLOR PERMITS - Denied | 2 Years |
| Police | Chief of Police | 144 | SPECIAL INVESTIGATIONS, VICE MASSAGE PARLOR PERMIT LOG - Denied | 2 Years |
| Police | Chief of Police | 145 | SPECIAL INVESTIGATIONS - Intelligence Files | Date Inactive+5 Years |
| Police | Chief of Police | 696 | INTERNAL AFFAIRS, NON-MISCONDUCT - Non-Misconduct Concerns (Sworn and Non-Sworn) | Date Initiated+2 Years |

Public Works

| | | Series # | Title and Description | Retention |
|-----------------------|----------------|----------|---|---|
| Administration | | | | |
| Public Works | Administration | 601 | SERVICE - Work Orders, Service Requests, Daily Work Logs, Records of Emergency Calls and Customer Complaints, EMID Utility Service Logs, Accident & Damage Log | 2 years |
| Public Works | Administration | 602 | WORKER'S COMP (CURRENT EMPLOYEES) - Industrial Accidents and Injuries Log specific to Public Works | Until employees last date of employment |
| Public Works | Administration | 603 | WORKER'S COMP (FORMER EMPLOYEES) - Industrial Accidents and Injuries Log specific to Public Works | 5 years |
| Public Works | Administration | 604 | TRAINING (HAZMAT RELATED) - Records related to topics such as, but not limited to Pesticides, Training, Confined Space Entry, OSHA Requirements (includes schedule of classes and attendance sheets for Tailgate Meetings) | 6 years after facility closure |
| Public Works | Administration | 605 | TRAINING (NON-HAZMAT RELATED) - Records related to topics such as, but not limited to Training, Heavy Equipment, Confined Space Entry, OSHA Requirements (includes schedule of classes and attendance sheets for Tailgate Meetings) | 2 years |
| Public Works | Administration | 606 | CONSTRUCTION PROJECTS (GRANT RELATED) - Progress Payments, Invoices | 3 Years from project completion or the term of the grant funding agreement--whichever is longer |
| Public Works | Administration | 607 | CONSTRUCTION PROJECTS (NON-GRANT RELATED) - Progress Payments, Invoices | Completion of Project + 3 Years |
| Public Works | Administration | 608 | CONSULTANT BILLING (GRANT RELATED) - Fees, Rate Schedules, Invoices, Pay Letters, Billing, Inquiries | 3 Years from project completion or the term of the grant funding agreement--whichever is longer |

City of San Jose Records Retention Schedule

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| Public Works | Administration | 609 | CONSULTANT BILLING (NON-GRANT RELATED) - Fees, Rate Schedules, Invoices, Pay Letters, Billing, Inquiries | 3 Years after Final Payment for the project |
| Public Works | Administration | 610 | GRANT FUNDING - Documents evidencing grants from County, State, or Federal Governments, Certificates of Deposits, Bonds | Final Report + 3 Years or longer if needed to comply with specific grant requirements |
| Public Works | Administration | 611 | UNFUNDED NEEDS LIST | 2 Years from list creation or last update whichever is later |

Construction Projects

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|--------------|-----------------------|-----|---|---|
| Public Works | Construction Projects | 637 | CIP (CONTRACT RELATED) - Construction Contracts and Bonds, Correspondence, Purchase Records, Contractor Daily Logs, Grading and Excavation Permits | Project Completion + 10 Years (or longer if a latent defect claim is filed by City) |
| Public Works | Construction Projects | 638 | CIP (NON-PROJECTS) - Proposed Projects, Program Information, Cancelled Projects | 2 Years |
| Public Works | Construction Projects | 639 | CIP (DESIGN/ENVIRONMENTAL) - Specifications, Designs, Change Orders, Drawings, Calculations, CEQA documents, Permits, Reports, Maps, Soil Reports, Grading Permits, Encroachments | PERMANENT |
| Public Works | Construction Projects | 640 | PROJECT TRACKING DATABASES - Projects in City's Right-of-Way; Schedule, financial and notes | Project Completion + 10 Years |
| Public Works | Construction Projects | 641 | PROJECT TRACKING DATABASES - Projects in the City's Right-of-Way; all except schedule, finaction and notes | PERMANENT |
| Public Works | Construction Projects | 642 | PROJECT IMAGES - Video Tapes, Slides, Photos | Project Completion + 10 Years |

Construction Support

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|--------------|----------------------|-----|--|-------------------------------|
| Public Works | Construction Support | 643 | MATERIALS TESTING LABORATORY RECORDS - Non-Structure | Project Completion + 15 years |
| Public Works | Construction Support | 644 | MATERIALS TESTING LABORATORY RECORDS - Structure | Life of Structure |
| Public Works | Construction Support | 645 | SURVEYING - Field Notebooks, Drawings | PERMANENT |

City of San Jose Records Retention Schedule

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| Public Works | Construction Support | 646 | UNDERGROUND SERVICE ALERT - CSJ Initiated Request | Project Completion + 3 Years |
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| Public Works | Construction Support | 647 | UNDERGROUND SERVICE ALERT - Non-CSJ Initiated Request | Inspection Date + 3 Years |
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Geographic Information Systems

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| Public Works | Geographic Information Systems | 648 | GIS DATA SYSTEM - graphic and non-graphic files for city basemap and infrastructure layers (sanitary sewer, storm drain, MuniWater, bridge and streetlight facilities) | PERMANENT |
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| Public Works | Geographic Information Systems | 649 | IMAGES - Orthorectified Aerial Photos/Satellite Images | PERMANENT |
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Master Plans and Studies

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|--------------|--------------------------|-----|--|-----------|
| Public Works | Master Plans and Studies | 623 | MAPS/DRAWINGS - Detail Drawings, Site Drawings, Seismic Hazards, Utility Maps, Water System, Pumping Facility Mapping Project, City Facilities, Aerial, Infrastructure Projects, Coordination Maps | PERMANENT |
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| Public Works | Master Plans and Studies | 624 | MASTER PLANS - City Plans for Construction and Buildings, Site Use | PERMANENT |
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| Public Works | Master Plans and Studies | 625 | MASTER PLANS - General, Regional, Land Use and Control, Soil Reports, Guadalupe Corridor, Main Jail, City Hall, Vault Plan, Airport | PERMANENT |
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| Public Works | Master Plans and Studies | 626 | STUDIES - Geologic Hazard Studies, Reports and Maps | PERMANENT |
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Equality Assurance

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| Public Works | Equality Assurance | 635 | PROJECT FILES - Internal and External Study and Implementation Projects, including wage violation records | Project Completion + 3 Years |
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| Public Works | Equality Assurance | 636 | DATABASES - Client Management, Customer Service Applications, Businesses, Contractors, Subcontractors | 5 Years from project completion |
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Permits

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| Public Works | Permits | 619 | PERMITS - Environmental Protection Agency Requirements, OSHA, BCDC, Air Quality, BAAQMD, Construction Requirements | Term of Permit + 5 Years |
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City of San Jose Records Retention Schedule

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| Public Works | Permits | 620 | PERMITS, STREET OPENING | PERMANENT |
| Public Works | Permits | 621 | TEMPORARY PERMITS - Bus Stop Permits, Special Fiber Permits, Minor Permits, Major Permits, 3-Revocable Permits | Term of Permit + 10 Years |
| Public Works | Permits | 622 | TEMPORARY PERMITS - Construction Plans, Drawings, Manufacturers Details and Drawings, O & M manuals, Vendor Spec Sheets | PERMANENT |

Private Development

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|--------------|---------------------|-----|---|-----------------------------|
| Public Works | Private Development | 612 | PROJECTS - Specifications, Drawings, Permits, Design, Soil Reports | PERMANENT |
| Public Works | Private Development | 613 | TEMPORARY PERMITS - Excavation, Grading, Encroachments | Term of Permit +3 Years |
| Public Works | Private Development | 614 | ASSESSMENTS - Special Assessments, Assessment Districts, Improvement Districts, Maintenance Districts, Maps - Maps, Plans and Engineer's Reports | Term of District + 10 Years |
| Public Works | Private Development | 615 | ASSESSMENTS - Special Assessments, Assessment Districts, Improvement Districts, Maintenance Districts, Maps - Financial Files and Misc. Project Files | Term+10 Years |
| Public Works | Private Development | 616 | TRACT FILES - Final Tract Map, Soil Reports, Acceptance, Contract Bonds, Improvement Plans | PERMANENT |

Private Utilities

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|--------------|-------------------|-----|--|---------------------------|
| Public Works | Private Utilities | 618 | TARIFF AGREEMENTS - Utility Company Agreements | Term of Project + 2 Years |
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Retirement

| | | Series # | Title and Description | Retention |
|-------------------|------------|----------|--|--|
| Retirement | | | | |
| Retirement | Retirement | 1051 | ACTIVE MEMBER RECORDS - Member Statements, Retirement Contributions | Until Retired, Dies, Defers or Return of Contributions |
| Retirement | Retirement | 1052 | DEFERRED VESTED FILES | Until Returns to Work, Retired, Dies, or Return of Contributions |
| Retirement | Retirement | 1053 | DEATH FILES - Retirement Files Where the Employee Dies Without Survivors | Estate Settled+7 Years |
| Retirement | Retirement | 1054 | RETIREE RECORDS - Benefit Information, Claims and 1099s Not in Retirement Database | Final Payment+7 Years |
| Retirement | Retirement | 1055 | RETURN OF CONTRIBUTION - Record of Employee Contributions to and Withdrawals from Retirement Account | 30 Years |
| Retirement | Retirement | 1056 | INVESTMENT FILES - Custodian Bank Reports, Investment Managers' Reports, Special Projects, Policies | Audit+5 Years |
| Retirement | Retirement | 1057 | INVESTMENT FILES - Investment Managers' Investment Requests, Approvals | Term of Contract +4 Years |
| Retirement | Retirement | 1058 | BANKING RECORDS - Statements, Signature Authorizations, Reconciliations | 4 Years |
| Retirement | Retirement | 1059 | REAL ESTATE RECORDS - Deeds, Sales, Closing Documents | PERMANENT |
| Retirement | Retirement | 1060 | REAL ESTATE MANAGEMENT - Leases, Maintenance | Term+4 Years |
| Retirement | Retirement | 1061 | RETIREMENT BOARD - Minutes, Agendas, Packets, Tapes, Board Resolutions, Annual Financial Reports | PERMANENT |
| Retirement | Retirement | 1062 | RETIREMENT DATABASE (Pension Gold) | Final Payment+5 Years |

Transportation

| | | Series # | Title and Description | Retention |
|----------------------------|---------------------|----------|---|--------------------------|
| Administration | | | | |
| Transportation | Administration | 247 | DISPATCH REPORTS | 6 Years |
| Transportation | Administration | 248 | SERVICE REQUESTS - Work Orders, Service Follow-Up, Daily Work Reports | 6 Years |
| Transportation | Administration | 249 | AERIAL PHOTOGRAPHS OF CITY STREETS | PERMANENT |
| Transportation | Administration | 250 | EMPLOYEE VEHICLE ACCIDENTS - Reports, Statistics, Correspondence | 5 Years |
| Transportation | Administration | 251 | TRANSPORTATION - Grants - Applications, Agreements, Reports, Correspondence | Final Report+3 Years |
| Transportation | Administration | 252 | COMMUTE ASSISTANCE PROGRAMS - Program Information, Applications, Fee Documentation, Lists of Participants | 2 Years |
| Engineering | | | | |
| Transportation | Engineering | 253 | ENGINEERING PROJECTS - Plans, Drawings, Specifications, Change Orders, Correspondence | Term of Project+10 Years |
| Transportation | Engineering | 254 | STREETS - Pavement Management System Database | PERMANENT |
| Landscape and Trees | | | | |
| Transportation | Landscape and Trees | 255 | ARBORIST, DATABASE - Database of Trees and Shrubs in the Public Right of Way | PERMANENT |
| Transportation | Landscape and Trees | 256 | ARBORIST, CITATIONS AND CORRESPONDENCE - Citations, Correspondence | 2 Years |
| Transportation | Landscape and Trees | 257 | STREETS - Cleaning, Street Sweeping, Storm Drain Cleaning - Schedules, Logs, Reports | 2 Years |
| Transportation | Landscape and Trees | 258 | STREETS - Repairs, Inspection Forms, Maintenance Documents, Work Orders | 10 Years |

City of San Jose Records Retention Schedule

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|----------------|---------------------|-----|---|----------|
| Transportation | Landscape and Trees | 259 | SIDEWALK CHECKS - Forms, Correspondence, Reports, Repair Notices | 10 Years |
| Transportation | Landscape and Trees | 260 | SIDEWALKS - Repairs, Maintenance Documents, Inspection Forms, Work Orders | 5 Years |
| Transportation | Landscape and Trees | 261 | LANDSCAPE MAINTENANCE - Water Usage, Fertilizer Usage, Routine Maintenance Schedules, Compost Volumes | 2 Years |

Lighting and Signs

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|----------------|--------------------|-----|--|--------------------|
| Transportation | Lighting and Signs | 262 | LIGHTING - Quad Files, Maps, Timing Schedules, Inventories | Superseded+2 Years |
| Transportation | Lighting and Signs | 263 | LIGHTING - Electrical Service Requests, Daily Job Lists, Timing Sheets | 2 Years |
| Transportation | Lighting and Signs | 264 | SIGNS - Maps, Inventories | Superseded+2 Years |
| Transportation | Lighting and Signs | 265 | SIGNS - Installation, Repair, Replacement - Reports, Correspondence, Work Orders | 2 Years |

Parking Services

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|----------------|------------------|-----|---|---------|
| Transportation | Parking Services | 266 | PUBLIC PARKING FACILITIES - Event Planning, Activity Schedules, Cleanup Records, Work Orders, Approvals, Correspondence | 2 Years |
| Transportation | Parking Services | 267 | PERMITS - Annual Transportation, Tow Away, Residential, Parking Hood Forms | 4 Years |
| Transportation | Parking Services | 268 | REPORTS - Facility Recap Reports, Parking Meter Reports | 5 Years |
| Transportation | Parking Services | 269 | VALIDATION PROGRAM - Reports, Forms, Receipts, Program Information | 4 Years |
| Transportation | Parking Services | 270 | PARKING METER INVENTORIES | 2 Years |
| Transportation | Parking Services | 271 | PARKING HOODS - Forms, Receipts | 4 Years |

Traffic Safety

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|----------------|----------------|-----|--|---------|
| Transportation | Traffic Safety | 272 | NEIGHBORHOOD AUTOMATED SPEED ENFORCEMENT (NAS COP) - Applications by Public, Petitions, Installations, Contracts | 2 Years |
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City of San Jose Records Retention Schedule

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|----------------|----------------|-----|--|---|
| Transportation | Traffic Safety | 273 | NEIGHBORHOOD AUTOMATED SPEED ENFORCEMENT (NASCOPI) - Violation Notices, Photos | 5 Years |
| Transportation | Traffic Safety | 274 | PERMITS, SINGLE TRIP AND TEMPORARY STREET CLOSURES | 4 Years |
| Transportation | Traffic Safety | 275 | BIKE UNIT - Lanes, Paths - Maps, Inventories | Superseded+2 Years |
| Transportation | Traffic Safety | 276 | BIKE UNIT - Lanes, Paths - Maintenance and Repair Reports, Correspondence, Work Orders | 2 Years |
| Transportation | Traffic Safety | 277 | BIKE ACCIDENTS - Crash Reports, Kids Safe Program, Site Review and Accident Evaluations, Followup Reports and Recommendations, Repair Orders | 2 Years |
| Transportation | Traffic Safety | 278 | SCHOOL PEDESTRIAN SAFETY COMMITTEE - Notes, Correspondence | 2 Years |
| Transportation | Traffic Safety | 279 | TRANSPORTATION DEVELOPMENT ACT - Projects, Studies, Reviews | Completion of Project or Study+ 5 Years |
| Transportation | Traffic Safety | 280 | TRAFFIC SAFETY IMPROVEMENTS - Project Files, Studies, Photos, Memos, Correspondence | Completion of Project or Study+5 Years |

Sewers

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|----------------|--------|-----|--|---------------------------|
| Transportation | Sewers | 281 | MAINTENANCE - Work Orders, Repairs, Cleaning, Flushing of Lines, Repairs, Stoppage Calls, Spills, Line Replacement, Notices to Public, Schedules | 5 Years |
| Transportation | Sewers | 282 | SEWER MAPS | PERMANENT |
| Transportation | Sewers | 283 | INSPECTIONS - Daily Inspection Reports | 2 Years |
| Transportation | Sewers | 284 | EQUIPMENT - Nonvehicular - Repair Records, Operating Manuals | Life of Equipment+2 Years |
| Transportation | Sewers | 285 | REPORTS | 5 Years |

Traffic Studies

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|----------------|-----------------|-----|---|---------|
| Transportation | Traffic Studies | 286 | INTERSECTION FILES - Files for Every Intersection in San Jose Including Flow Patterns, Statistics, Rates, Vehicle Volume, Reports | 5 Years |
|----------------|-----------------|-----|---|---------|

City of San Jose Records Retention Schedule

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|----------------|-----------------|-----|--|--------------------|
| Transportation | Traffic Studies | 287 | SURVEYS - Speed Surveys, Traffic Count Reports | 5 Years |
| Traffic | | | | |
| Transportation | Traffic | 288 | SIGNALS - Timing Records, Maintenance Reports, Work Orders, Records for Activity and Timing Evaluation | 10 Years |
| Transportation | Traffic | 289 | SIGNALIZED INTERSECTION FILES - Installation Information, Plans, Drawings, Specifications, Studies | Superseded+2 Years |
| Transportation | Traffic | 290 | SIGNALIZED INTERSECTION FILES - Complaints, Maintenance Reports, Correspondence | 2 Years |

