



Records Retention Schedule

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This document is keyword searchable.

Airport

		Series #	Title and Description	Retention
Finance and Administration				
Airport	Finance and Administration	1149	REAL PROPERTY RECORDS - Records documenting the purchase, transfer, or sale of real property including but not limited to deeds, appraisals and valuations, closing statements, agreements, property descriptions, easements, and property dispute documentation.	PERMANENT
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
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Operations

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

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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.
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

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

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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				
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

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

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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
City Clerk	Elections	828	BALLOTS - Ballots cast by voters in elections, initiatives, referendums, and any other electrorate voting event.	6 months

Legislative

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 of San Jose Records Retention Schedule

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
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Recordkeeping

City Clerk	Recordkeeping	814	CITY CHARTER - Including all amendments.	PERMANENT
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City Clerk	Recordkeeping	815	CITY SEAL AND ALL MODIFICATIONS	PERMANENT
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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
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City Clerk	Recordkeeping	817	BOARD, COMMISSION, AND COMMITTEE RECORDS	See Citywide General Schedule
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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
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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.
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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
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City Clerk	Recordkeeping	821	CONTRACTS	See Citywide General Schedule
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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
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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
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City of San Jose Records Retention Schedule

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 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

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

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

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

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

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
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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
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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
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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
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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
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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
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City of San Jose Records Retention Schedule

City Manager	Employee Relations	672	VACATION CARRYOVER RECORDS - Records documenting the carryover of vacation by employees.	5 Years
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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.
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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
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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.

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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.

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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

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

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

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

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

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 (including insurance certificates) 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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City of San Jose Records Retention Schedule

Citywide General	Finance, Budget & Grants	174	DEPARTMENT CHECKING ACCOUNT AND PETTY CASH RECORDS - Accounting records for receipt and disbursement of petty cash including but not limited to statements, reconciliations, deposit slips, cancelled checks, receipts, logs, and other documentation not copies of records maintained by Finance Department.	4 Years
Citywide General	Finance, Budget & Grants	175	DEPARTMENT CHECKING ACCOUNT SIGNATURE AUTHORIZATIONS.	Until Superseded+2 Years
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	323	PROPERTY & LIABILITY INSURANCE POLICIES - Policies covering fire, theft, property damage, personal injuries, general liability, and other risk areas.	Expiration or supersession of policy or resolution of outstanding claims, whichever is longer, + 5 years
Citywide General	Finance, Budget & Grants	324	SUBROGATION RECORDS - All documents pertaining to subrogation of claims.	Last Payment+4 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

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
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 and members of Council appointed bodies, including but not limited to waivers, applications, ethics forms, and key logs.	End of Volunteer Service + 3 Years

City of San Jose Records Retention Schedule

Citywide General	Human Resources	173	VOLUNTEER CONTACT INFORMATION - Names, addresses, telephone numbers, and email addresses of volunteers and their designated emergency contacts.	Until Superseded
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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
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

City of San Jose Records Retention Schedule

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
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

City of San Jose Records Retention Schedule

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	406	HAZARDOUS MATERIALS TRAINING RECORDS - Records documenting training provided employees in the use and handling of hazardous materials.	Closure of facility/operation or 3 years, whichever is longer (current staff). 3 years after leaving City service (former staff)
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
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

Economic Development

	Series #	Title and Description	Retention
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	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
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

City of San Jose Records Retention Schedule

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
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

City of San Jose Records Retention Schedule

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
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
Real Estate				
Economic Development	Real Estate	627	REAL PROPERTY, ACQUISITIONS	PERMANENT
Economic Development	Real Estate	628	RELOCATION - 30 & 90 Day Notices, Relocation Referrals, Relocation Plans, Claims, Expenses, Negotiations	PERMANENT
Economic Development	Real Estate	629	APPRAISALS - (Land Not Purchased) - Preliminary Site Selection Cost Validation, Appraisal	PERMANENT

City of San Jose Records Retention Schedule

Economic Development	Real Estate	630	PROPERTY DISPUTES - Claims, Correspondence, Cases	PERMANENT
Economic Development	Real Estate	631	TITLE REPORTS	PERMANENT
Economic Development	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
Economic Development	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
Economic Development	Real Estate	634	PROPERTY RELATED CORRESPONDENCE - Acquisition, Appraisal, City Attorney, City Manager, Council Memos, General Information, Redevelopment Agency and Relocation.	3 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

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

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

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

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

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

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

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

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

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

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

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

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	753	WORKERS COMPENSATION RECORDS - Copies of Workers Compensation claim forms and other records, the record copy of which is retained by Human Resources.	End of Employment + 2 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
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

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
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

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

City of San Jose Records Retention Schedule

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
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Office of Fire Chief

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
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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
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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
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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
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Fire	Office of Fire Chief	782	SAFETY AND HEALTH STATISTICS - Statistical reports derived from data gathered regarding safety and health issues.	10 Years
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Fire	Office of Fire Chief	783	VEHICLE ACCIDENT RECORDS - Reports of employee vehicular accidents and supervisor accident injury profiles	5 Years
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Emergency Services

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

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

Housing

		Series #	Title and Description	Retention
Administration				
Housing	Administration	188	HOUSING DEPARTMENT REPORTS, ROUTINE -Division Monthly, Bi-Monthly, Quarterly, City Service Area (CSA) Monthly and Mayor's Bi-Monthly Reports	2 years
Housing	Administration	189	HOUSING DEPARTMENT REPORTS, OFFICIAL - Including but not limited to Consolidated Plan, Consolidated Action Plan & Evaluation Report (CAPER), Five-Year Housing Plan, RDA Five-Year Investment Plan, Housing Element	20 Years
Housing	Administration	190	ACCOUNTS PAYABLE DISBURSEMENTS - Includes all Housing Disbursements in Project Development, Rehab Construction, Single Family Loans, Grants, contracts	Longer of life of Loan or Affordability Restrictions + 2 Years
Housing	Administration	194	DENIED TRANSACTIONS - All cancelled projects and applications, rejected RFP/RFQ, Ineligible petitions within Housing except CDBG program	2 Years
Asset Management				
Housing	Asset Management	204	LOAN MONITORING & COMPLIANCE - Records documenting monitoring of housing development projects for compliance with program requirements, including but not limited to insurance, certification, income verification, property taxes, Housing Revenue Bond Monthly Statements, and other financial reports.	5 Years
Housing	Asset Management	205	LEGAL CUSTODY FILES - Supporting documentation the transfer of title for closed/paid off housing development project loans, including but not limited to deeds of trust, affordability restrictions, promissory notes, and loan documents.	Longer of life of Loan or Affordability Restrictions + 7 Years
Housing	Asset Management	206	SINGLE FAMILY LOAN RECORDS - Records of loans and their repayment for single family homes, including but not limited to first time home buyers, second mortgages, Teacher Housing Program, and inclusionary for sale.	Longer of life of Loan or Affordability Restrictions + 12 Years

Community Development Block Grants

Housing	Community Development Block Grants	195	COMMUNITY DEVELOPMENT BLOCK GRANTS (CDBG) ADMINISTRATION RECORDS - Records documenting the application for, approval of, and administration of CDBG grants including but not limited to applications, agreements, financial folders, goal measures, activity reports, award letters, and background information (due diligence).	Term + 4 Years
Housing	Community Development Block Grants	196	COMMUNITY DEVELOPMENT BLOCK GRANTS (CDBG), DENIED APPLICATIONS - Unsuccessful applications for CDBG grants and related documentation such as correspondence	2 Years
Housing	Community Development Block Grants	197	COMMUNITY DEVELOPMENT BLOCK GRANTS PROGRAM AUDIT RECORDS - Records documenting HUD audits and follow-ups to HUD audits of the CDBG program.	Final Report Issued + 3 Years
Housing	Community Development Block Grants	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
Housing	Community Development Block Grants	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
Housing	Community Development Block Grants	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
Housing	Community Development Block Grants	720	CONSTRUCTION LOANS/CONDITIONAL GRANTS ADMINISTRATION RECORDS - Records related to grants used for acquisition/rehabilitation of commercial property, including public facilities and community centers, and secured by those properties.	Term or until paid in full + 5 years

Healthy Neighborhood Venture Funds

Housing	Healthy Neighborhood Venture Funds	918	HEALTHY NEIGHBORHOODS VENTURE FUNDS - Program Plans	Term+2 Years
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City of San Jose Records Retention Schedule

Housing	Healthy Neighborhood Venture Funds	919	HEALTHY NEIGHBORHOODS VENTURE FUNDS - Service Grants Approved - Applications, Agreements, Tracking of Payments, Goal Measures, Activity Reporting, Award Letters, Background Information Received (Due Diligence), Program Audit Reports and documentation.	Final Payment+ 5 Years
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Homeless Services

Housing	Homeless Services	192	GRANTS - Records grants provided to support homeless services including but not limited to Emergency Shelter Grants (ESG), Housing Opportunities for Persons with AIDS (HOPWA), Homeless Prevention and Rapid Re-Housing Program (HPRP) Housing Trust Fund and other HUD and City Programs. Documents include applications, contracts, financial, statistical, and any supporting records pertinent to an award.	Term of contract + 4 Years
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Project Development

Housing	Project Development	208	PROJECT DEVELOPMENT CONSTRUCTION RELATED RECORDS - Records pertaining to construction projects, including but not limited to plans, surveys, City clearances, lien releases, certifications, change orders, and draw requests.	Completion of Project and Notice of Completion + 10 Years
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Housing	Project Development	209	PROJECT DEVELOPMENT APPLICATION RECORDS, INTERNALLY FUNDED - Records documenting the application for, review and approval of, and underwriting of housing development projects supported by City funding including Loan Committee Records.	Longer of life of lease or affordability restrictions + 5 Years
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Housing	Project Development	210	PROJECT DEVELOPMENT APPLICATION RECORDS, EXTERNALLY FUNDED - Records documenting the application for, review and approval of, and underwriting of housing development projects supported by funding sources other than the City, including but not limited to the California Debt Limit Allocation Committee (CDLAC) and the Tax Credit Allocation Committee (TCAC). Also includes Notifications of Funding Availability (NOFA) applications.	Longer of life of lease or affordability restrictions + 5 Years
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Housing	Project Development	211	NOTIFICATIONS OF FUNDING AVAILABILITY (NOFA), APPLICATIONS NOT APPROVED - Applications for funding available for single and multi-family housing projects that were not approved including related NOFAs.	2 Years
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Rehabilitation

Housing	Rehabilitation	212	REHABILITATION SINGLE FAMILY LOANS UNDERWRITING - CALDAP, Home Improvement, Infill Housing, Mobilehome Repair, Rental Housing Rehab, Housing Preservation Program, Emergency Repair, Other Loan Programs	Longer of life of Loan or Affordability Restrictions + 4 Years
Housing	Rehabilitation	213	REHABILITATION GRANTS - Paint, Lead, Rehab Funds, Emergency Repair Program	Completion of project + 4 Years

Relocation

Housing	Relocation	214	PERMANENT RELOCATION	Final Payment + 3 Years
Housing	Relocation	215	TEMPORARY RELOCATION	Final Report + 3 Years
Housing	Relocation	216	FINANCIALS, RELOCATION - Federal Audits, Grant Support Documentation	Final Report + 3 Years

Rental Rights & Referrals Program

Housing	Rental Rights & Referrals Program	199	SETTLEMENT DECISIONS - Apartments and Mobilehomes	PERMANENT
Housing	Rental Rights & Referrals Program	200	APARTMENT AND MOBILE HOME CASE FILES - Apartments and Mobilehomes (Petitions, Evidence, Tapes)	Case Closed + 5 Years
Housing	Rental Rights & Referrals Program	202	RENTAL NOTIFICATIONS - Records documenting the notification of renters and/or landlords of decisions and actions including but not limited to Annual Mobilehome Rent Increase Notices, Notices of Termination of Tenancies, and Annual Fee Exemptions.	2 Years
Housing	Rental Rights & Referrals Program	203	MOBILEHOMES LONG TERM LEASES - Rental agreement leases for mobilehomes.	Life of Lease + 5 Years

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

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

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

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

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

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

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

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
Training				
Human Resources	Training	519	CATALOGS - Listing of Classes Offered to City Employees	PERMANENT
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

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

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

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

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 Services

	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

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	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
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

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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
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

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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
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

City of San Jose Records Retention Schedule

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
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

City of San Jose Records Retention Schedule

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
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

City of San Jose Records Retention Schedule

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

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

City of San Jose Records Retention Schedule

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
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

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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
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

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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
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

City of San Jose Records Retention Schedule

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
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

City of San Jose Records Retention Schedule

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
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-GRAFFITI - Paint Supply Logs, Phone Logs of Requests, Applications, Schedules, Permission from Private Property Owners, Volunteer Lists, Training Records	2 Years

City of San Jose Records Retention Schedule

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
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

City of San Jose Records Retention Schedule

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
Parks Recreation & Neighborhood Services	Parks - Regional, Neighborhood, Special Facilities	1033	WATER RIGHTS - Documentation	PERMANENT

Parks and Civic Grounds Management

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

City of San Jose Records Retention Schedule

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
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

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

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

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

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

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
Cases				
Police	Cases	32	BOMB SQUAD CASE FILES	Closed+7 Years
Police	Cases	71	COURT LIAISON RECORDS - Docket Lists, Calendars, Bail Summary, Affidavits for Probable Cause, District Attorney Rejection Slips	2 Years
Police	Cases	74	FINANCIAL CRIMES - Pawnbroker Receipts, Tickets	2 Years
Police	Cases	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	Closed+5 Years
Police	Cases	78	INVESTIGATION CASE FILES, 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	Closed+3 Years
Police	Cases	79	INVESTIGATION CASE FILES, ASSAULT UNIT - Case Files - Assault Unit - Kidnapping for Ransom / Extortion, Embezzlement, Falsification of Public Records	50 Years
Police	Cases	80	INVESTIGATION CASE FILES, CHILD ABUSE SUBSTANTIATED - Child Abuse, Child Neglect - Substantiated Cases	PERMANENT
Police	Cases	81	INVESTIGATIONS CASE FILES, CHILD ABUSE, UNSUBSTANTIATED - Child Abuse, Child Neglect - Unsubstantiated Cases	Last report received for suspected child abuser + 10 years
Police	Cases	82	INVESTIGATION CASE FILES, DOMESTIC VIOLENCE AND ELDER ABUSE/NEGLECT - Case Files - Family Violence Unit - Domestic Violence and Elder Abuse or Neglect	Closed+10 Years

City of San Jose Records Retention Schedule

Police	Cases	83	INVESTIGATION CASE FILES, GANGS	Closed+5 Years
Police	Cases	85	INVESTIGATIONS, HOMICIDE AND OFFICER INVOLVED SHOOTINGS - Case Files - Homicide Unit - Homicide (Not Including Suicide) and Officer Involved Shootings	50 years
Police	Cases	87	INVESTIGATION CASE FILES, SUICIDE - Suicide and Attempted Suicide Case Files	20 Years
Police	Cases	89	INVESTIGATION CASE FILES, MISSING PERSONS - Case Files - Missing Persons Unit	Closed+5 Years
Police	Cases	91	INVESTIGATION CASE FILES, CHILD MOLESTATION - Sexual Assault Unit - Child Molest - Substantiated Cases	PERMANENT
Police	Cases	92	INVESTIGATION CASE FILES, CHILD MOLESTATION - Sexual Assault Unit - Inconclusive and Unsubstantiated Cases	10 Years after most recent report
Police	Cases	93	INVESTIGATIONS, SEXUAL ASSAULT - Sexual Assault Unit - Sexual Assault excluding child molestation cases (see series 91 and 92).	No further activity foreseen+20 Years
Police	Cases	99	INVESTIGATIONS, GANGS ACTIVE - Gangs - Information on Gang Activity and Members for CAL-GANG Database	Inactive+5 Years
Police	Cases	106	SPECIAL EMPLOYEES UNDERCOVER AGENT CASE FILES	Date Closed+5 Years
Police	Cases	115	FACTUALLY INNOCENT RECORDS - Sealed Factually Innocent Records	Sealed+3 Years
Police	Cases	120	JUVENILE ARREST AND INVESTIGATION RECORDS, SEALED (Juvenile Sealings)	Date of Petition+5 Years
Police	Cases	128	STOLEN GUN FILES	Date Recovered+10 Years
Police	Cases	136	POLICE OFFICER INVOLVED SHOOTINGS - Reports, Interviews, Studies	Date of Incident+10 years
Police	Cases	139	SPECIAL INVESTIGATIONS, VICE	Closed+5 Years
Police	Cases	141	SPECIAL INVESTIGATIONS - GAMING, Surveillance Video Log, Table Count, Incident Reports, Background Investigations, Cardroom Permits	PERMANENT

City of San Jose Records Retention Schedule

Police	Cases	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	Cases	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	Cases	345	INVESTIGATIONS, FATAL ACCIDENTS - Traffic Investigations Unit - Fatal Accidents, Felony Hit & Run	50 years
Police	Cases	695	INVESTIGATIONS, AUTO THEFT UNIT - Auto Theft Unit - Vehicle Identification Number (VIN) Checks	2 Years

Evidence

Police	Evidence	38	PURSUIITS/CHASES AUDIO/VIDEO TAPES - Recordings of pursuits and chases by Police personnel.	3 Years
Police	Evidence	48	ILLEGAL SUBSTANCE AND ALCOHOL TEST RECORDS - Records documenting the administration and results of tests for illegal substances and alcohol including but not limited to Valtox logs.	5 Years
Police	Evidence	66	PHOTO LAB - PHOTOS - Crime Scenes	10 Years
Police	Evidence	67	PROPERTY REPORTS - Form 13 - Open and Dead (Reconciled)	20 Years
Police	Evidence	68	PROPERTY REGISTER LOG - Index Log of Property Taken In and Stored	20 Years
Police	Evidence	73	COURT LIAISON, EVIDENCE - Property Summary Reports	Disposition+10 Years
Police	Evidence	76	INVESTIGATION CASE BURN FILES - Case Burn Files - Destruction of Evidence	8 Years

General

Police	General	40	PREPROCESSING CENTER - INTAKE AND SCREENING - (Juvenile and Adult) - Files and Completed Forms, Logs	5 Years
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City of San Jose Records Retention Schedule

Police	General	63	PERSONNEL EMPLOYEE FILES, SWORN	Term of Employment + 20 Years
Police	General	107	COMMUNICATIONS, 911 MASTER TAPES AND CAD LOGS	2 Years
Police	General	108	COMMUNICATIONS, FCC LICENSES	Term+2 Years
Police	General	126	RESTRAINING ORDERS	Term of Order
Police	General	130	WARRANTS - Notices to Appear, Warrants Recalled, Cleared Warrants	3 Years
Police	General	138	POLICY AND PROCEDURE FILES - Policies, Procedures, Directives, Duty Manuals	PERMANENT
Police	General	694	WARRANTS UNIT - Completed Extradition Files	2 Years
Police	General	697	RECRUITMENT RECORDS, UNSUCCESSFUL APPLICANTS - Documents relating to unsuccessful employment applications, sworn and non-sworn, including but not limited to applications, test results, and background investigation materials.	3 Years

Incidents

Police	Incidents	53	FALSE ALARM INCIDENTS - False Alarm Warning Card Files, Reports	2 Years
Police	Incidents	114	TRAFFIC AND CRIMINAL COURT CITATION FILES	5 Years
Police	Incidents	124	CRIME AND INCIDENT REPORTS (Including Supplemental Reports)- Including but not limited to incident Reports, Offense Reports, Traffic Accident Reports, Juvenile Contact Reports, Abandoned Vehicles, Impounded Vehicles, Stolen Vehicles, Recovered Vehicles, Stolen Plates, DUI, and Public Intoxication.	10 Years
Police	Incidents	134	INTERNAL AFFAIRS COMPLAINTS - Complaints Against Department Members (Sworn and non-sworn)	Date Received+6 years
Police	Incidents	696	INTERNAL AFFAIRS, NON-MISCONDUCT - Non-Misconduct Concerns (Sworn and Non-Sworn)	Date Initiated+2 Years

Intelligence and Reference

Police	Intelligence and Reference	50	VCET (Violent Crime Enforcement Team) STREET GANG FILES	PERMANENT
Police	Intelligence and Reference	102	INVESTIGATION INFORMATION CARD FILES	PERMANENT
Police	Intelligence and Reference	116	FIELD INTERVIEWS - Cards, Information Gathered in All Formats	10 Years
Police	Intelligence and Reference	117	OSSD FINGERPRINT FILES - Case (Palm) Print Cards, Fingerprint Cards, Latent Lift Cards	PERMANENT
Police	Intelligence and Reference	145	SPECIAL INVESTIGATION INTELLIGENCE FILES	Date Inactive+5 Years

Permits and Registrations

Police	Permits and Registrations	52	POLICE PERMITTING RECORDS - Records of applications for, and approval or denial of various Police permits such as taxi, tow, massage parlors, secondary employment, entertainment, gaming, and peddlers including but not limited to applications, inspections, issuance documents, hearings, correspondence, photographs, and background checks.	Life of Permit or Denial, Suspension, or Revocation + 6 Years
Police	Permits and Registrations	105	SEX REGISTRANT FILES	Life of Registrant or 2 Years whichever is longer
Police	Permits and Registrations	119	OSSD- GUN FILES - Voluntary Registrations	PERMANENT
Police	Permits and Registrations	407	HANDGUN SALES REPORTS - Reports of sales of pistols and revolvers on federally mandated forms (currently ATF 3310.4).	20 days from receipt unless the purchaser is prohibited from possessing a firearm under 18 USC 922(g) or (n)

Programs & Projects

Police	Programs & Projects	36	COMMUNITY DEVELOPMENT AND CRIME PREVENTION PROGRAM RECORDS - Records documenting the development and administration of programs and projects such as Neighborhood Watch, Senior Security Crime Stoppers, Ride Along, and Truancy Abatement, including but not limited to correspondence, emails, plans, proposals, presentations, and memoranda.	2 Years
Police	Programs and Projects	45	SPECIAL OPERATIONS, K-9 AND HORSE MOUNTED - Training Files, Bite Memos	Until Animal is Retired+7 Years
Police	Programs and Projects	342	SPECIAL OPERATIONS, METRO AND GRAFFITI	10 Years

Public Works

		Series #	Title and Description	Retention
Animal Care and Services				
Public Works	Animal Care and Services	901	LICENSING - Applications, Rabies Certificates	3 Years
Public Works	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
Public Works	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
Public Works	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
Public Works	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
Public Works	Animal Care and Services	906	FOSTER RESCUE PROGRAM - Contracts	Term of Contract+3 Years
Public Works	Animal Care and Services	907	RIDE ALONG PROGRAM - Program Plans, Waivers, Reports	2 Years
Public Works	Animal Care and Services	908	SPAY/NEUTER PROGRAM - Applications, Vouchers	3 Years
Public Works	Animal Care and Services	909	FINANCIAL BACKUP - Revenue Summary Sheets, Receipts, Veterinary Invoices	4 Years

Administration

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

City of San Jose Records Retention Schedule

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
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				
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

City of San Jose Records Retention Schedule

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, finanction and notes	PERMANENT
Public Works	Construction Projects	642	PROJECT IMAGES - Video Tapes, Slides, Photos	Project Completion + 10 Years

Construction Support

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

Fleet and Equipment

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

City of San Jose Records Retention Schedule

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

Facilities Management

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

Geographic Information Systems

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
Public Works	Geographic Information Systems	649	IMAGES - Orthorectified Aerial Photos/Satellite Images	PERMANENT

Master Plans and Studies

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
Public Works	Master Plans and Studies	624	MASTER PLANS - City Plans for Construction and Buildings, Site Use	PERMANENT
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
Public Works	Master Plans and Studies	626	STUDIES - Geologic Hazard Studies, Reports and Maps	PERMANENT

Equality Assurance

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

Permits

Public Works	Permits	619	PERMITS - Environmental Protection Agency Requirements, OSHA, BCDC, Air Quality, BAAQMD, Construction Requirements	Term of Permit + 5 Years
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

City of San Jose Records Retention Schedule

Public Works	Permits	622	TEMPORARY PERMITS - Construction Plans, Drawings, Manufacturers Details and Drawings, O & M manuals, Vendor Spec Sheets	PERMANENT
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Private Development

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

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

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

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

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

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

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
Transportation	Traffic Safety	738	TRAFFIC SIGNAL AUTOMATED ENFORCEMENT PHOTOGRAPHIC RECORDS - Photographic records resulting from automated systems used to capture evidence of traffic violations.	6 months or until final disposition of citation
Transportation	Traffic Safety	739	TRAFFIC SIGNAL AUTOMATED ENFORCEMENT CITATION RECORDS - Records documenting the issuance of citations for traffic signal violations exclusive of photographic records (see series #738)..	2 Years or final disposition of citation, whichever is longer
Sewers				
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

City of San Jose Records Retention Schedule

Transportation	Sewers	284	EQUIPMENT - Nonvehicular - Repair Records, Operating Manuals	Life of Equipment+2 Years
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Transportation	Sewers	285	REPORTS	5 Years
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Traffic Studies

Transportation	Traffic Studies	286	INTERSECTION FILES - Files for Every Intersection in San Jose Including Flow Patterns, Statistics, Rates, Vehicle Volume, Reports	5 Years
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Transportation	Traffic Studies	287	SURVEYS - Speed Surveys, Traffic Count Reports	5 Years
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Traffic

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