



Records Retention Schedule

Prepared by
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Records Retention Schedule

Amendment History

Amendment Number	Date	Revision
n/a	09/27/10	Retention Schedule Adopted
1	04/28/14	Edits to address omitted or inaccurate schedules in: Board of Directors, Contracts Management, Customer Service, Drinking Water, Engineering, Finance, General Counsel, IT, Payroll, Real Estate, Recreation, SCADA, Wastewater Utility Billing, Wastewater and Water Use Efficiency
2	10/15/14	Edits to address omitted or inaccurate schedules in: Contracts Management, Communications, Development Services, HR and Safety/Security
3	2/11/16	Complete departmental review and re-write
4	12/22/16	Edits to Insurance and Utility Billing sections based on organizational or procedural changes. Added Revision History, page numbers in preface section, and disposition of photographs with no identifiable value.



Records Retention Schedule

PURPOSE

This records retention schedule serves as El Dorado Irrigation District's (District) policy to be used for the proper management, retention, and disposition of District records and documents. Proper management of District records provides the following benefits:

- Higher quality and faster service to our customers
- Reduces records storage costs
- Perform searches for documents and information quickly

DIRECTIVE

This records retention schedule shall be used by all departments, divisions, sections and units throughout the District as the policy for the proper management and retention of District records and documents.

This records retention schedule shall be applied to all document types, including hard copies, original copies, and scanned or imaged copies archived and managed in an electronic document management system.

No record or document shall be disposed of or destroyed before its required retention period. Nor shall any document be retained any longer than its required retention, unless the documents are pending litigation. If pending litigation, the documents shall be put on "legal hold" and shall be retained until further notice from the Office of the General Counsel. Any document provided to the public shall have any confidential information (i.e. names, addresses, account numbers, financial information of customer, etc.) redacted from documents.

GUIDELINES

Amendments- If a new record series arises at the District that is not included in this records retention schedule and/or an amendment needs to be made to a current record series, then a records retention amendment form shall be filled out by the primary office of record and signed by the appropriate management personnel. The form shall be submitted to the Records Management office, and upon approval by the Office of General Counsel, the amendment(s) and/or new records series shall be incorporated into the records retention schedule. The District's General Counsel will provide the Board of Directors and General Manager with quarterly updates of any changes to the retention schedule. Please contact the Records Management office for amendment forms.

Copies or Duplicates – Copies or duplicates retained in an office in which a department, division, section, or unit is not the primary office of record can be disposed of by the non-primary office at their leisure. However, copies shall not be retained in any format, including hard copy, scanned, or imaged copy, longer than the specified retention period.

Records Disposal- When a record has reached its required retention period, no department, division, section, or unit shall dispose of any records in any format including, hard copy, scanned or imaged copy, without following the proper records disposal procedures established by the Records Management office.



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Except as specified herein, a document destruction form must first be filled out and signed by the appropriate management personnel and the General Counsel. The original document destruction form shall be retained permanently by the Records Management office for record disposition verification. Records with a retention period defined as “supersede(s)” do not require a document destruction form so long as the District maintains the latest, most current version of such records.

Records Management staff will work closely with the records custodians to properly dispose of expired records. Records may be disposed of, regardless of retention period, if they pose a health risk, due to improper storage, or are stored within obsolete media that cannot be converted. Additionally, photographs with no label or other identifiable value shall be disposed of if their effectiveness cannot be determined.

No District official or employee has, by virtue of his or her position, any personal rights to District records even though he or she may have created or compiled them. The unauthorized destruction, removal, or use of such records is prohibited. Records Management prohibits the use of removable devices to store or backup records. Removable devices are defined as thumb drives, CD/DVD, external hard drives, and similar such devices.

DEFINITIONS

Confidential – Documents that contain sensitive or confidential information and are not open for public review. These documents cannot be disclosed to the public upon request.

Document - A document can be any physical form of information, decision, or reporting whether written, electronic, photographs, physical sample, sample drawing, computer program, etc.

Disposition –Describes the current state of a record, whether or not it exists at the District, or if it has been disposed of.

Historical – Records that have enduring value because they reflect the District’s formation and significant historical events.

Non-Record – Materials that are not retained in the normal course of business, such as: records that contain no information of significant or lasting value such as acknowledgements, drafts, rough notes or calculations created and used in the preparation or analysis of other documents. As non-records are not retained in the normal course of business, they may be disposed of at any time. However, if a non-record is retained as an integral part of a file or in conjunction with original records, it shall be retained in accordance with the appropriate retention schedule.

Primary Office of Record – Department, division, section, or unit in which a record is generated or managed.

Public – Documents that do not contain confidential information and are open for public review. These documents can be disclosed to the public upon request.



Records Retention Schedule

Record – All papers, maps, exhibits, magnetic or paper tapes, photographic films and prints, and other documentation produced, received, owned or used by the District, regardless of physical form or characteristics.

Records Custodian – A single individual, appointed by the Department Head, who satisfies the following conditions: 1) The person understands the record systems of the office 2) The person is able to make decisions on retention and disposition of records.

Records Management – The professional management of information in the physical form of records from the time records are received or created through the entire lifecycle of the record.

Total Retention - The length of time required for a record to be retained. No record shall be disposed of or destroyed before this given time period.



Records Retention Schedule

LEGEND

Records Retention

AU=Audit Year

CL=Close or completion of project

CM=Current Month

CY=Current Year

L=Life

P=Permanent

S=Superseded

T=Termination

CITATIONS

CCP= Code of Civil Procedure

CEQA = California Environmental Quality Act

CFR= Code of Federal Regulations

GC = Government Code

NPDES = National Pollution Prevention Discharge System

OSHA = Occupational Safety & Health Act

UFC = Uniform Fire Code

ABBREVIATIONS

CM= Contracts Management

NTP=Notice to Proceed

PM = Project Manager

RM = Records Management

RFB=Request for Bid

RFP=Request for Proposal

RFQ=Request for Qualifications



Records Retention Schedule

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Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
ADMINISTRATION						
ADM01	Committee Meetings	District committee meeting minutes and agendas	Departmental	CY+10		Public
ADM02	Goals and Objectives	Departmental and division goals – long term and short term	Departmental	S		Public
ADM03	Grants Successful	Documentation of federal or state grant funding for various projects, programs, or emergencies / natural disasters. Successful / funded	Departmental	CL+5	Retain for 5 years after the final Financial Status Report is complete	Public
ADM04	Grants Unsuccessful	Documentation of federal or state grant funding for various projects, programs, or emergencies / natural disasters. Unsuccessful / unfunded	Departmental	CL+2		Public
ADM05	Performance Measures	Departmental, divisional, individual performance measures	Departmental	S		Public
ADM06	Procedures Manuals	Departmental and divisional procedures. Created by departments and divisions for project and task reference	Departmental	S		Public
BOARD OF DIRECTORS						
BOD01	Board Agenda Items	Board AIS	Board of Directors	P	Closed Session Items = Confidential	Public
BOD02	Board Agendas and Minutes	Official Board meeting minutes	Board of Directors	P	Closed Session Items = Confidential	Public
BOD03	Board Meeting Packets	Board Packets	Board of Directors	P	Closed Session Items = Confidential	Public
BOD04	Board Resolutions	Board Actions	Board of Directors	P	Closed Session Items = Confidential	Public
BOD05	Board Tapes/Audio	Board Room Recordings	Board of Directors	CL+1	Closed Session Items = Confidential 1year after approval of Board meeting minutes	Public
BOD06	Power Point Presentations	Power Point slides and information presented at Board meetings. Retained for reference.	Board of Directors	CY+6	Closed Session Items = Confidential	Public
BOD07	Protest Letters	Protests, Proposition 218, etc.	Board of Directors	CL+3	Close date begins after last rate increase period.	Public



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Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
COMMUNICATIONS / PUBLIC OUTREACH						
COM01	Correspondence	Incoming and outgoing letters, emails, memos, and transmittals	Public Outreach	CY+2		Public
COM02	Event Materials	Event invitation (if sent), printed materials and handouts.	Public Outreach	CY+2		Public
COM03	Press Release	Press releases initiated by the District.	Public Outreach	P		Public
COM04	Publications	District informational materials and publications (e.g. Waterfront, Prop 218, Water Quality/Consumer Confidence Report)	Public Outreach	P		Public
CONTRACTS MANAGEMENT						
CM01	Addenda	Used to correct inaccuracies in RFBs, RFPs, or RFQs. Becomes part of the bid, proposal, or qualifications.	Contracts Management	CL+10	Close is the project completion date.	Public
CM02	Advertisements – Legal Notices	Legal notices advertisement sent to newspapers, to obtain bids, proposals, or statements of qualifications from contractors or consultants to perform work on a project.	Contracts Management	CL+10	Close is the project completion date.	Public
CM03	Agreements – Access Indemnity, and Release	Site access agreements with contractors potentially performing work on projects.	Contracts Management	P		Public
CM04	Agreements - Escrow for Security Deposits in Lieu of Retention	Escrow agreements with contractors performing work on projects.	Contracts Management	CL+10	Close is the project completion date.	Confidential
CM05	Agreements - Grants	Capital project related grant agreements.	Contracts Management	P		Public
CM06	Agreements - MOU	Capital project related memorandum of understanding agreements.	Contracts Management	P		Public
CM07	Agreements – Reimbursement	Capital project related agreements for reimbursement.	Contracts Management	P		Public
CM08	Agreements / Contracts - On-Call	Agreements /contracts with contractors or consultants to perform work or services for the District on an on-call basis.	Contracts Management	P		Public
CM09	Agreements / Contracts Capital Improvements	Agreements / contracts with contractors or consultants to perform capital project services, or to provide goods.	Contracts Management	P		Public



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Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
CM10	Bid Escrow Documents Capital Improvements	Information submitted by contractor as required in the Bid Specifications.	Contracts Management	CL	Shred immediately after project completion and close out. Close is the project completion date	Confidential
CM11	Bid Opening Checklist Capital Improvements	The Bid Opening Checklist form used to verify construction bidder has submitted all required items.	Contracts Management	CL+10	Close is the project completion date	Public
CM12	Bid Summary Capital Improvements	Spreadsheet to summarize all construction bids received.	Contracts Management	CL+10	Close is the project completion date	Public
CM13	Bids Successful Capital Improvements	Bid documents submitted by the successful bidder.	Contracts Management	CL+10	See regulatory for compliance projects required by State or Federal. Close is the project completion date	Public
CM14	Bids Unsuccessful Capital Improvements	Bid documents submitted by the unsuccessful bidder.	Contracts Management	CL+2	Close is the project completion date	Public
CM15	Certified Payroll	Certified payroll information received from Prime Contractor.	Contracts Management	CL+10	Close is the project completion date	Public
CM16	Contract Change Order	Change to an agreement or contract relating to scope of work, completion date, etc. Capital Improvement Projects Operations & Maintenance Projects	Contracts Management	CL+10 CL+2	Close is the project completion date	Public
CM17	Correspondence	Includes letters, memos or transmittals regarding a contract. Capital Improvement Projects Operations & Maintenance Projects	Contracts Management	CL+10 CL+2	Close is the project completion date	Public
CM18	Form - Emergency	Form listing emergency contact numbers for those working on a particular project.	Contracts Management	CL+10	Close is the project completion date	Public



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Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
CM19	Form - Project Status Form	Contract Status Inquiry request (usually from the bonding company).	Contracts Management	CL+10	Close is the project completion date	Public
CM20	Form - Public Works Form	A State of California (Department of Industrial Relations) form that must be completed after a construction project is awarded. Capital Improvement Projects Operations & Maintenance Projects	Contracts Management	CL+10 CL+2	Close is the project completion date	Public
CM21	Form – SAM (System for Award Management)	Website search to ensure a contractor or consultant is not debarred from working in the USA. Capital Improvement Projects Operations & Maintenance Projects	Contracts Management	CL+10 CL+2	Close is the project completion date	Public
CM22	Meeting Agenda	Agenda for meetings regarding capital improvements projects.	Contracts Management	CL+10	Close is the project completion date	Public
CM23	Notice of Award Capital Improvements	Notice to a contractor who has been awarded a contract.	Contracts Management	CL+10	Close is the project completion date	Public
CM24	Notice of Completion Form Capital Improvements	Form stating a construction project is complete. Includes E-10 Form	Contracts Management	P		Public
CM25	Notice of Intent to Award Capital Improvements	Notice of intent to award a contract. Given after a bid opening and information is verified. Not a final notice	Contracts Management	CL+10	Close is the project completion date	Public
CM26	Notice to Proceed	Notice to Contractor – Gives them the approval to begin construction on a project. Capital Improvement Projects Operations and Maintenance Projects	Contracts Management	CL+10 CL+2	Close is the project completion date	Public
CM27	Payments and Invoices Capital Improvements	Invoices received from contractors, consultants, or vendors requesting payment for work performed on a project. Includes payment processing documents.	Contracts Management	CL+10	Close is the project completion date	Public
CM28	Preliminary Bid Results	Preliminary bid results form prepared for website posting immediately following a bid opening.	Contracts Management	CL+10	Close is the project completion date	Public



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Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
CM29	Project Manual - Specifications Capital Improvements	Project specifications and drawings.	Contracts Management	P		Public
CM30	Proposals Successful Capital Improvements	Proposals submitted by proposer in response to an RFP. Successful and awarded	Contracts Management	CL+10	Close is the project completion date	Public
CM31	Proposals Unsuccessful Capital Improvements	Unsuccessful proposals submitted by proposer in response to an RFP. Unsuccessful and not awarded	Contracts Management	CL + 2	Close is end of the proposal process	Public
CM32	Proposals Unsuccessful	Unsuccessful proposals submitted by proposers in response to an RFP. Unsuccessful and not awarded	Contracts Management	CL + 2	Close is end of the proposal process	Public
CM33	Request for Proposal (RFP)	Request for proposal published by the District to notify contractors of CIP projects eligible for bidding. Capital Improvement Projects Operations & Maintenance Projects	Contracts Management	CL+10 CL+2	Close is the project completion date	Public
CM34	Request for Qualifications (RFQ)	Request for Qualifications published by the District to notify contractors the District is seeking qualified contractors to bid on CIP projects.	Contracts Management	CL+10	Close is the project completion date	Public
CM35	Single Source Justification Memo	Form prepared by project manager that justifies that a particular contractor or company is the only company that can perform a certain type of work or provide a certain type of material. Therefore, eliminating the need to go request bids. Capital Improvement Projects Operations & Maintenance	Contracts Management	CL+10 CL+2	Close is the project completion date	Public



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CM36	Statements of Qualifications Successful	Statement of Qualifications submitted by contractor of consultant in response to an RFQ. Successful and pre-qualified	Contracts Management	CL+10	First page of SOQ containing contact information is public. Everything else is confidential. Close is the project completion date	Confidential
CM37	Statement of Qualifications Unsuccessful	Unsuccessful Statement of Qualifications submitted by contractor or consultant in response to an RFQ. Unsuccessful and not qualified	Contracts Management	CL+2	First page of SOQ containing contact information is public. Everything else is confidential. Close is the project completion date.	Confidential
CM38	Stop Notices	Document sent to the District by subcontractors working on public works jobs if they are not being paid in a timely manner by the Contractor.	Contracts Management	CL+10	Close is the project completion date	Public
CM39	Stop Notice - Release	Document sent to the District by subcontractor releasing a stop notice, indicating they have been paid or settled with the Contractor.	Contracts Management	CL+10	Close is the project completion date	Public
CM40	Waiver and General Release for Access to EID Property	Waiver signed, typically, during a pre-bid meeting allowing access to our property. Capital Improvement Projects Operations & Maintenance Projects	Contracts Management	CL+10 CL+2	Close is the project completion date	Public
CM41	Waiver and General Release Form-Progress payments and Final payments	Form submitted by Contractor with progress invoices and final invoice.	Contracts Management	CL+10	Close is the project completion date	Public



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CROSS CONNECTION AND BACKFLOW PREVENTION PROGRAM						
CC01	Surveys	Onsite inspections of water on customers premises to evaluate actual and potential hazards to public water system.	Cross Connection	P		Public
CC02	Correspondence	Cross connection, control, and compliance enforcement. Documents requiring water customers to comply with program requirements	Cross Connection	P		Public
CC03	Differential Pressure Gauge Calibrations	Annual calibration certification for backflow testing equipment.	Cross Connection	CY+3		Public
CC04	Drawings and Maps	Maps of water, recycled, and sewer line connections. SEE MAPPING	Mapping	S		Public
CC05	Regulations	Cross Connection and Backflow Prevention Program Documentation supporting program regulations AR5021.	Cross Connection	S+2		Public
CC06	Test Records	Annual backflow prevention assembly test performed by Contractor.	Cross Connection	CY+3		Public
CULTURAL RESOURCES						
CUL01	Agreements /MOUs Programmatic	Legal document used in conjunction with the management plan. Used to document agreement between participating parties pertaining to specific programmatic treatment of sites (as opposed to specific sites). Originated by department and other party.	Cultural Resources	P		Confidential
CUL02	Cultural Resources Reports and Supporting Documentation	Cultural Resources Reports, inventories and mitigation reports. Includes documentations to substantiate cultural resources reports, archaeological reports, letters and records of phone conversations, consultations with interested parties notes	Cultural Resources	P	CEQA Guidelines, 36 CFR 79, Historical	Confidential
CUSTOMER SERVICE						
CS01	Correspondence	Incoming and outgoing letters regarding customer inquiries, disputes, and customer service related information	Customer Service	CY+2		Public
CS02	Customer Notifications	Notifications sent to customers to advise of a service interruption in their service area, drought related information, or other District information to customers via phone and email.	Customer Service	CY+3		Public
CS03	Customer Surveys	Customer satisfaction surveys distributed randomly to water and wastewater account holders. Used to determine satisfaction level with customer service, field service, reliability and rates.	Customer Service	CY+10		Public



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Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
DEVELOPMENT SERVICES						
DS01	Annexations	Annexation project files.	Development Services	P		Public
DS02	Correspondence	Includes letters, memos, fax, email – excluding developer correspondence.	Development Services	CY+2		Public
DS03	Developer Project Files	Project file created when a customer or developer want to take action on a property. Project files kept 10 years after the acceptance of a project. EXCEPT: Sundry, record drawing, photos, Facility Plan Report, agreements, E-10 package, and project acceptance letter.	Development Services	CL+10 P	Close is date of acceptance.	Public
DS04	Facility Improvement Letters – Non-Active	FILs in which a developer project did not occur.	Development Services	CY+10		Public
DS05	Facility Plan Report (FPR's) – Non-Active	Completed plan reviews that do not become developer projects.	Development Services	CY+10		Public
DS06	Improvement Districts	Improvement district construction files.	Development Services	P		Public
DS07	Private Water Line Files	Documentation of former private water lines.	Development Services	P		Public
DS08	Sundries – Non-Developer Purchases	Invoice for purchases that may include water, recycled water or sewer services, meter relocation, meter upsize/downsize, meter conversion. Documentation may include service application package and work orders.	Development Services	P		Public
DS09	Variances	When a project approval is requested that falls outside of established guidelines, a variance application may be completed. If approved, Variance becomes part of the developer project file, or applicant can proceed with service purchase (Sundry); both retained permanently	Development Services	CY+2		Public
ENGINEERING						
ENG01	Correspondence – Internal, and External, Incoming and Outgoing	Letters, fax, memo, to or from contractors, or consultants regarding CIP projects. DOES NOT INCLUDE GOVERNMENT REGULATORY OR DAMS	Engineering	CL+10	Close is project completion date.	Public
ENG02	Development Standards	Development, Design and Construction Standards	Engineering	S		Public



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ENG03	DOT Projects	Projects initiated by the County Dept. of Transportation, requiring modifications to District infrastructure. May include RFIs and other Non-District specific information Completed Projects Documentation on work not performed and for RFIs that are not projects.	Engineering	CL+10 CY+1	Close is project completion date.	Public
ENG04	Historical	Citizen's committees, rainfall history, Sly Park data, Drought history – vital to historical records and history of event.	Engineering	P		Public
ENG05	Manuals - O&M	Operations and Maintenance Manuals	Facility	S	Retain for the life of the facility	Public
ENG06	Permits	CIP – Engineering and Inspections related permits: Encroachment permits, building, signs, grading, and encroachment. Includes all permits for development, design, and construction. DOES NOT INCLUDE GOVERNMENT REGULATORY OR DAMS	Engineering	P	See Regulatory for projects relating to FERC, DSOD, or Dams	Public
ENG07	Photographs / Videos	CIP related photographs DOES NOT INCLUDE GOVERNMENT REGULATORY OR DAMS	Engineering	P	See Regulatory for projects relating to FERC, DSOD, or Dams	Public
ENG08	Preliminary Liens	Issued to the District by subcontractors for public work projects.	Engineering	CL+10	Close is project completion date.	Public
ENG09	Projects Not Completed or Denied	CIP documentation on projects that were never initiated or were not approved by the Board of Directors. EXCEPT: Design info, calculations and other District work products.	Engineering	CL+10 P		Public
ENG10	Reports - CIP	Includes various Engineering reports and studies, including, but not limited to geotechnical, environmental reports, surveys, project completion reports, water diversion, water resources and reliability, water rights, and 5-year Capital Improvement Project Plan.	Engineering	P		Public



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Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
ENG11	Reports – CIP Budget Reports	Capital Improvement Projects budget reporting	Engineering	CL+10	Close is project completion date.	Public
ENG12	Requests for Information - RFI	Questions from contractors to District Project Managers regarding drawings, project manual, etc. Includes responses from District project managers to contractors.	Engineering	CL+10	Close is project completion date.	Public
ENG13	Submittals –Final CIP	Final-Approved Only Project Manager reviews and takes action on submittals submitted by contractor, includes planning, design, construction, conversions, or modifications of local govt.-owned facilities, structures and systems.	Engineering	P		Public
ENG14	Submittals – Not Approved CIP	Submittals that have been rejected, noted exceptions, or asked for revisions.	Engineering	CL+10	Close is project completion date.	Public
ENG15	Title 22 Recycled Water Engineering Reports	Engineer’s report describing the location, uses, and project description for recycled water use. Reports are amended on an as-needed basis, if the project scope is modified.	Engineering	P		Public
ENG16	Transmittals - CIP	Form used to document the transfer of documents to or from a government agency, or outside contractor or vendor. DOES NOT INCLUDE GOVERNMENT REGULATORY OR DAMS	Engineering	CL+10	Close is project completion date.	Public
ENVIRONMENTAL COMPLIANCE AND REVIEW						
ENV01	Air Quality (AQMD)	County and State Air Quality Permits; including generator permits; participants-or voucher logs and recordings, total daily mileage survey (TDM); various local authorities and commute alternative info.	Environmental	T	Termination is cancellation or revocation of permit	Public
ENV02	Ca Environmental Quality Act - CEQA	Includes NEPA, Notice of Exemptions, determinations, and completions, Environmental Impact Reports, Mitigation Monitoring Plans, negative declarations, comments, and statements of overriding considerations, public notices filed with county or government agencies.	Environmental	P	CEQA Guidelines	Public
ENV03	Correspondence	Environmental Review, correspondence, Consultants, issues, conversations.	Environmental	CY+2		Public



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ENV04	Correspondence Capital Improvements	Description of CIP project for Environmental Department, emailed to Environmental, informs Environmental of projects. Ultimately becomes part of Environmental reports. Compliance purposes. Includes Environmental Review correspondence, issues, and conversations	Environmental	CL+10		Public
ENV05	Reports	Includes soil reports and asbestos reports. Documents abatement projects, and public buildings.	Environmental	P		Public
FEDERAL ENERGY REGULATORY COMMISSION (FERC)						
SEE REGULATORY						
FINANCE						
Accounting						
FIN01	Audit - Annual Financial Reports	Independent Auditor Analysis	Finance	P		Public
FIN02	Accounts Receivable	Miscellaneous cash receipts, daily cash receipts filed by month, substantiates, incoming cash from customer and vendors. Includes cash register tapes.	Accounting	AU+7		Public
FIN03	Assessment Districts	Assessment Districts files	Accounting	P		Public
FIN04	Budget	Board approved operating budget. Used to track budget expenditures and budget allocations. Includes Financing Authority Documents.	Finance	P		Public
FIN05	CAFRs - Backup	Various CAFRs associated files and backups	Accounting	P		Public
FIN06	Cash to General Ledger	Investment Support Documentation and Reconciliation: Reconciles cash and general ledger, investments, and bank accounts. Includes supporting material, Sympro reports, bank register, and supporting analysis worksheets.	Accounting	AU+5		Public
FIN07	Bank Reconciliations	Incoming and Outgoing. Pertinent banking data and information for each month. Documents issues and correspondence; Sly Park cash receipts. Letters and greenbar, balancing AP funds from GL to System for Audit.	Accounting	AU+5		Public
FIN08	Fixed Assets	Fixed Asset Inventory: Annual updates needed for FCC study. Annual update of fixed assets. Fixed Asset Depreciation: Part of financial statements, includes checks, invoices and backup. Reflects purchase dates, and cost account numbers	Accounting	L		Public
FIN09	Form DE542	Used for independent contractors, includes supporting documents	Accounting	AU+4		Public



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FIN10	Journal Entries	Transactions which would otherwise not be recorded in any other fashion in the general ledger; Accounts receivable/time and materials billing including monthly activity. Initiates time and material billings. Includes customer name, service address, meter readings, usage payments, applications / cancellations; Customer payments-daily activity & CX reports; Customer payments/monthly journal-monthly activities, billing errors, fund changes, CIP funds.	Accounting	P	Electronic copies will be retained permanently. Paper copies will be retained for CY+1 for audit purposes.	Public
FIN11	Journals - Capital Improvement Projects, Green Sheets	CIP files associated with funding issues and fixed assets. Includes green sheets, AIS, minutes, journals, etc. Billing included monthly activity.	Accounting	CL+10		Public
FIN12	Rates	Yearly rates for water, sewer, irrigation, recycled water, etc. Board of Directors rate decisions.	Finance	P		Public
FIN13	Reports – Miscellaneous, Finance	Miscellaneous reports, financial notebooks, and fixed finance documents for departmental reference. Finance Department Head financial files and Administrative Assistance financial files. Financial Subject Files. Includes Grizzly Flats JPA Operating Budget Files.	Finance	S		Public
FIN14	Reports - Sales Tax	Federal and State - Filed by calendar year. Monthly or quarterly sales / use tax returns filed with the CA Board of Equalization. Includes supporting documents and Forms 1096, 1099, W-4, and W-2	Accounting	AU+4		Public
Accounts Payable						
FIN15	Accounts Payable	AP invoices with copies of checks and backup documentation. Includes CIP invoices and payments, employee reimbursements for travel, training, seminars, or purchases; Monthly invoice payments to USBR	Accounts Payable	AU+10	Government Code Section 60201(d)(12)	Public
FIN16	Form W-9, New Vendor	Vendor information, vendor forms, tax compliance - scanned since 2004	Accounts Payable	AU+7	Government Code Section 60201(d)(12)	Public
FIN17	Vendor Register - 1099	Letter and greenbar, alpha vendor listing or purchase orders, invoices, account numbers, and check dates. \$ amount reportable to company to Federal and State, includes copies of documentation sent to IRS – compliance.	Accounts Payable	AU+7		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
FIN18	Warrant Register	Agenda Item Summary, and cover page - expenditures paid in check run, dates to be approved by Board of Directors, and approval dates	Accounts Payable	AU+2		Public
FIN19	Warrant Register - Executive Summary	Weekly executive summary of weekly warrant register, prepared for General Manager. Outlines major expenditures by fund in narrative form.	Accounts Payable	AU+2		Public
Treasury						
FIN20	Bank Check Register	Pertinent banking data for month, bank check register, records all banking activity for a particular month. Includes statements, summaries for receipts, disbursements & Reconciliations.	Treasury	AU+5		Public
FIN21	Bank Reconciliation	Equity Reconciliation, spreadsheets and reports, statements, summaries for receipts, disbursements and reconciliation, balances per book vs. balances per bank.	Treasury	AU+5		Public
FIN22	Bank Statements	Monthly bank account statements, substantiates bank activity for particular month.	Treasury	AU+4		Public
FIN23	Bonds	Final Bond Documents	Treasury	P		Public
FLEET						
FLT01	Emissions Smog Tests	Test results	Fleet	CY+2		Public
FLT02	Inspections - Equipment Crane Inspection	Inspection results	Fleet	CY+2		Public
FLT03	Fuel Logs	Mileage readings, fuel consumption reports, invoices, receipts and records pertaining to refueling operations.	Fleet	AU+7		Public
FLT04	Hazardous Waste Disposal	Documentation regarding handling and disposal of hazardous waste.	Fleet	AU+7	CAL OSHA; 40 CFR122.21	Public
FLT05	Periodic Smoke Inspection Fleet Program (PSIP)	Documents related to the annual smoke and tamper inspections or our heavy duty fleet vehicles.	Fleet	CY+1		Public
FLT06	Basic Inspection Terminal Report	90-day inspection reports	Fleet	CY+2		Public
FLT07	Vehicle Ownership & Title	Owner's manual, warranty documents, Department of Motor Vehicle title and registration, and related documents.	Fleet	L		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
FLT08	Vehicles - Heavy Duty	On-road heavy duty diesel fueled vehicles owned or operated by public agencies and utilities; documents pertaining equipment maintenance and retrofit.	Fleet	L		Public
FLT09	Work Orders	Service and work orders for vehicle maintenance.	Fleet	L		Public
GENERAL SERVICES						
GS01	Building	Documents relating to building equipment, maintenance and operations. Includes warranty and repair paperwork.	General Services	L+2		Public
GS02	Surplus	Documents supporting surplus property disposition. Includes inventory of equipment gone to auction and supporting paperwork.	General Services	AU+4		Public
HAZARDOUS WASTE MANAGEMENT						
HAZ01	Hazardous Waste Manifest and Bills of Lading	Manifest for the disposal of hazardous waste. Manifests are generated as waste is disposed of.	Hazardous Waste Management	CY+10		Public
HAZ02	Hazardous Waste Storage	Weekly inspection form for hazardous waste storage site.	Hazardous Waste Management	CY+10		Public
HAZ03	Hazardous Waste Facility	Files of each facility that generates hazardous waste. Includes disposal history, annual fee payment records, and various facility information.	Hazardous Waste Management	CY+10		Public
HAZ04	Inspection Records	EID facility inspections by El Dorado County and CA State agencies.	Hazardous Waste Management	CY+10		Public
HAZ05	Spill Prevention, Control, and Countermeasures Plan (SPCC)	Procedures and methods the District would use to prevent or respond to an unplanned oil discharge. Plans are required for facilities that store more than 1,320 gallons of petroleum product on-site.	Hazardous Waste Management	CY+25		Public
HUMAN RESOURCES						
HR01	Classification specifications and Salary schedules	Description of position classification duties and responsibilities. Salary schedule – compensation for each classifications	Human Resources	S+2		Public
HR02	Correspondence	Non-Safety correspondence includes letter log, memos, transmittals, and faxes.	Human Resources	T+7		Confidential



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
HR03	Employee Files	Active, New Hire, Terminated, State Disability, Disciplinary, Evaluations, and Medical: State Disability insurance files, unemployment, reassignments, commendations, disciplinary actions, terminations, Oaths of office, employee evaluations, pre-employment medical exams, fingerprints, offer letters, benefit enrollment information, employee applications, training certificates and licenses, automobile liability insurance certificates (if applicable), rental insurance certificates (for District rental properties, if applicable), employee evaluations, letters of recognition, disciplinary actions, promotions and transfers, pre-employment drug screening and physical, pre-employment and pre-assignment medical clearances, includes periodic, episodic records, etc.	Human Resources	T+7		Confidential
HR04	Employee Grievance / Complaints - Arbitration Files	Composed of investigation notes regarding employee complaints such as discrimination or sexual harassment claims. May include arbitration, grievances, union requests, sexual harassment and civil rights, complaints, and disciplinary actions.	Human Resources	T+7		Confidential
HR05	Employee Handbook	General employee information including benefits plan.	Human Resources	S+2		Public
HR06	Employee Training	Mandatory employee training, non-safety. Sign-in sheets, training documentation	Human Resources	T+7		Public
HR07	Form I-9	Proof of right to work in the United States.	Human Resources	T+7		Public
HR08	Labor Negotiations	Negotiations between EID management and EID employees. Contains notes leading up to MOU agreement. Includes notes, notebooks, and correspondence	Human Resources	P		Confidential
HR09	Memorandum of Understanding	Contract / agreement between EID employees and EID management	Human Resources	P		Public
HR10	Position Control	Backup documentation for job descriptions to substantiate claims of terminated employees. Lists all positions filled, available, and vacant. Frequently referenced and changed depending on vacancies and budget constraints	Human Resources	T+7		Public
HR11	Recruitment	Job announcements, advertisements, applications, ethnicity forms, exams, interview questions, resumes, eligibility lists and logs, and invoices.	Human Resources	CL+7		Confidential
HR12	State Disability Insurance	Insurance certifications and policy	Human Resources	P		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
HYDROELECTRIC OPERATIONS						
HYD01	Correspondence	Incoming and outgoing correspondence- non regulatory, non-project	Hydro	CY+2		Public
HYD02	Flow Data	Flow data and water level storage reported to US Geological Survey (USGS) and State Water Resources Control Board (SWRCB), US Forest Service, Fish and Game, Federal Energy Regulatory Commission (FERC), and Department of Water Resources (DWR)	Hydro	P		Public
HYD03	Flume Repair and Maintenance	Site Files – Used for repair and maintenance of flumes, hydro plant properties, lakes, spillways and water lines. Includes, correspondence, permits, drawings, work orders, water readings, dam safety, studies, water sampling results	Hydro	P	FERC Compliance	Public
HYD04	Manuals – O&M	Operations and Maintenance Manuals. Received at project completion. Information needed to maintain equipment and facilities.	Hydro	S		Public
HYD05	Photographs / Videos	Historical – Used for training, public relations, etc.	Hydro	P		Public
HYD06	Projects – Operations and Maintenance (Non-CIP)	Hydro projects for repairs and maintenance, not funded by CIP	Hydro	CL+2	Close is the project completion date.	Public
HYD07	Reports	CEC-1304 Quarterly Reports, CEC-RSPGEN, EIA Yearly Reports 923 and 860, monthly power production reports, monthly revenue reports	Hydro	P		Public
HYD08	Safety Data Sheets	Binders containing information about hazardous materials on site. Binders stored in vehicles and on-site at Camp 5 for safety purposes and for first responders.	Hydro	S		Public
HYD09	Work Orders	Maintenance records for Hydro system infrastructure. Generated and maintained in Hansen	Hydro	L	Retain for the life of the facility	Public
INDUSTRIAL PRETREATMENT PREVENTION PROGRAM						
IPPP01	Industrial Pretreatment and Pollution Program (IPPP)	Submittal to EPA/RWQCB of EID's IPPP Program. Includes updates, changes and supporting documents.	Environmental Compliance	P		Public
IPPP02	Monitoring Data	Monitoring data collected by IPP Program at WWTP, collection system, or customer facilities.	Environmental Compliance	CY+10		Public
IPPP03	Reports	Status of Industrial Pretreatment Program	Environmental Compliance	CY+5	CY+5 per NPDES	Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
IPPP04	Wastewater Discharge Permits - Active IPPP	Current and historical copies of WDP's, applications, inspections, correspondence, and plans, etc. related to the WDP. Includes supporting documentation.	Environmental Compliance	L	Life is active term, until re-classified	Public
IPPP05	Wastewater Discharge Permits – Inactive or Exempt IPPP	Historical copies of WDP's, applications, inspections, correspondence, and plans, etc. related to the WDP. Includes supporting documentation.	Environmental Compliance	CY+5		Public
INFORMATION TECHNOLOGY						
IT01	Email – Employee Inbox Folder	Applies to email messages contained in the employee's "inbox" folder. Messages in this folder exceeding the retention duration will be moved to the "deleted items" folder and subsequently permanently deleted without further action by the employee.	Information Technology	Message Date + 90 Days		Public
IT02	Email – Employee Sent Item Folder	Applies to email messages contained in the employee's "sent items" folder. Messages in this folder exceeding the retention duration will be moved to the "deleted items" folder and subsequently permanently deleted without further action by the employee.	Information Technology	Message Date + 90 Days		Public
IT03	Email – Employee Drafts Folder	Applies to email messages contained in the employee's "Draft" folder. Messages in this folder exceeding the retention duration will be moved to the "deleted items" folder and subsequently permanently deleted without further action by the employee.	Information Technology	Message Date + 90 Days		Public
IT04	Email – Employee Defined Email Folder	Applies to email messages contained in any folders the employee may have created. Messages in any employee-defined folder exceeding the retention duration will be moved to the "deleted items" folder and subsequently permanently deleted without further action by the employee.	Information Technology	Message Date + 2 Years		Public
IT05	Email – Employee Deleted Items Folder	Applies to email messages contained in the employee's "Deleted Items" folder. Messages in this folder exceeding the retention duration will be permanently deleted without further action by the employee.	Information Technology	Message Date + 30 Days		Public
IT06	Email-Journal	Applies to all email messages sent from or received to an @eid.org email address. This instance of email messages is not maintained or accessible to employees and is intended for HR and Legal search purposes only	Information Technology	Message Date + 2 Years		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
IT07	IT Project Documents (Non-CIP)	Charters, project plans, project status reports, test and acceptance results, post-project evaluations and findings. Includes documents regarding business process and change management.	Information Technology	S		Public
IT08	System Logs	Logging data from IT systems that indicate performance issues. Includes Enterprise & Infrastructure systems and application servers.	Information Technology	90 Days		Confidential
IT09	Voice Mail Messages	Voice mail messages.	Information Technology	Message Date + 30 Days		Public
INSPECTION SERVICES						
INSP01	Correspondence	Incoming or outgoing - letters, memos, to or from contractors, consultant's vendors relating to a CIP project. DOES NOT INCLUDE DEVELOPER PROJECTS OR REGULATORY PROJECTS	Inspection	CL+10	Close is project completion date for CIP	Public
INSP02	Daily Log Books	Journals of daily inspection activities.	Inspection	CY+10		Public
INSP03	Inspection Reports	Inspection reports. Includes daily record of work performed for EID or Developer projects, verification and confirmation with drawings. Includes various specialty inspection files from inspectors, concrete inspections, compression tests, compaction, painting, etc.	Inspection	CL+10	Close is project completion date for CIP and date of acceptance for Developer projects.	Public
INSP04	Photographs and Videos	Pictures or videos of construction site and progress.	Inspection	P		Public
INSP05	Punch List	Used at project completion to verify that all aspects of the job are complete.	Inspection	CL+10	Close is project completion date for CIP and date of acceptance for Developer projects.	Public
INSP06	Request for System Shutdown/Tie-in	Paperwork associated with connecting new services to the system.	Inspection	CL+10	Close is date of acceptance for Developer projects.	Public
INSURANCE / RISK MANAGEMENT						
INS01	Claims, Damage	Claim documentation	Insurance / Risk Management	CL+5	Close is when claim is closed.	Confidential
INS02	Insurance Certificates – Lease Holders	Insurance certificates from parties leasing District facilities, including Silver Lake cabins and boat slips.	Insurance / Risk Management	T+1	Termination is expiration or revocation of permit	Public
INS03	Insurance, Certificates – Vendors/ Consultants/ Contractors	Insurance certificates– CIP Non-CIP	Insurance / Risk Management	CL+10 T + 5	Close is when project is completed.	Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
INS04	Insurance, Liability/Property	Liability and Property insurance for EID facilities	Insurance / Risk Management	P		Public
INS05	Permits – Pressure Vessels	Permits to operate Liquid Propane Gas (LPG) & air pressure tanks.	Insurance / Risk Management	T	Termination is expiration or revocation of permit.	Public
IRRIGATION MANAGEMENT SYSTEMS						
IMS01	Correspondence	Communications with customers by US Postal Services, Incoming and Outgoing	Irrigation Management Systems	CY+2		Public
IMS02	Radioactive Materials License	California Department of Health Radioactive Division. State license required to process and operate radioactive soil moisture measuring device.	Irrigation Management Systems	T+3	T is Termination of Radioactive Materials License	Public
IMS03	Radioactive Material License – Film Badge Report	Results of radioactive monitoring devices carried by operators.	Irrigation Management Systems	T+3	T is Termination of Radioactive Materials License	Public
IMS04	Radioactive Material License – Leak Test	Required to possess radioactive soil moisture measuring devise.	Irrigation Management Systems	T+3	T is Termination of Radioactive Materials License	Public
IMS05	Radioactive Material License – Safety Officer Certificate	Requirement for the State radioactive material license.	Irrigation Management Systems	T+3	T is Termination of Radioactive Materials License	Public
IMS06	Radioactive Material License – Shipping Papers	Required to transfer radioactive monitoring devices.	Irrigation Management Systems	T+3	T is Termination of Radioactive Materials License	Public
IMS07	Radioactive Material License – Training Certificates	Required to operate the radioactive soil moisture measuring device.	Irrigation Management Systems	T+3	T is Termination of Radioactive Materials License	Public
IMS08	Reports – Growers	Predictive irrigation schedule	Irrigation Management Systems	CY+2		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
LABORATORY						
LAB01	Bacterial Analysis	Compliance records; includes location, date, method, and results, analysis of bacterial content of plant effluent.	Environmental	CY+12	State Water Resources Control Board - NPDES	Public
LAB02	Chemical Analysis	Compliance records include location, date, method, and results for organics, inorganics and conventional pollutants.	Environmental	CY+12		Public
LAB03	Correspondence	Incoming / Outgoing, compliance issued as needed, letters, memos, emails	Environmental	CY+10		Public
LAB04	Lab Data Reports	QA/QC Contract lab documentation	Environmental	CY+12		Public
LAB05	Quality	Compliance documentation including sampling data, analysis, surveys, documents, evaluation, schedules, valves, etc.	Environmental	CY+12		Public
LAB06	Reports – Lab Data	Reports Generated from OP10 or Hach-WIMS.	Environmental	CY+12		Public
MAPPING						
MAP01	Drawings – As Builts	Blueprints, drawings, maps, plans.	Mapping	P		Public
MAP02	GIS Documents	Maps containing geographic information. Also includes water and sewer line drawings.	Mapping	S		Public
MAP03	Photographs	Aerial photos.	Mapping	P		Public
METER SERVICES						
MS01	USA Locations	USA location request received from USA North.	Meter Services	CY+2		Public
OFFICE OF THE GENERAL COUNSEL (OGC)						
OGC01	Agreements / Contracts	Contracts between outside agencies, contractors, vendors, or consultants and EID. Some agreements / contracts may be confidential depending on the nature of the agreement.	OGC	P		Public / Confidential
OGC02	Board Policies and Administrative Regulations	Board approved policies and administrative regulations. Maintained electronically on EID Intranet Site; updated by OGC.	OGC	S+5		Public
OGC03	Correspondence	Includes correspondence from outside sources. Restricted access to OGC Personnel only.	OGC	CY+2		Confidential



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
OGC04	Litigation / Case Files	Includes various litigation case files pertaining to any project or claim – several files with numerous volumes per case.	OGC	CL+7	Close is final judgement, settlement, or other disposition of the case has occurred and any time for reconsideration or appeal has lapsed.	Confidential
OGC05	Reference Files – Board of Directors	Legal Filing Section 10.0 – Board of Directors	OGC	CY+10		Confidential
OGC06	Reference Files – Office of the General Manager	Legal Filing Section 20.0 – General Manager’s Office. EXCLUDING – 20.3 (Human Resources) and 20.6 (Water Policy Coordination/Special Projects)	OGC	CY+10		Confidential
OGC07	Reference Files – Human Resources	Legal Filing Section 20.3 – Human Resources EXCEPT Sections: 20.3.2, 20.3.4 thru 20.3.19, 20.3.22 thru 20.3.26	OGC	T+7 CY+10		Confidential
OGC08	Reference Files – Water Policy	Legal Filing Section 20.6 – Water Policy / Special Projects Includes various files types relating to Water Policy and Special Projects, maintained by the General Counsel Legal Counsel reference documents	OGC	P		Confidential
OGC09	Reference Files – Operations and Engineering	Legal Filing Section 30.0 – Operations and Engineering EXCLUDING – 30.2.11 (Ditches) and 30.4.5 (Water Rights)	OGC	CY+15		Confidential
OGC10	Reference Files – Ditches (Non-Hydro)	Legal Filing Section 30.2.11 – Ditches. Includes various file types relating to District ditches.	OGC	P		Confidential
OGC11	Reference Files – Project 184 Water Rights	Legal Filing Section 30.4.5 – Water Rights. Includes various file types relating to water rights associated with hydroelectric FERC Project No. 184.	OGC	P		Confidential
OGC12	Reference Files – Finance and Management Services	Legal Filing Section 40.0 – Finance and Management Services Includes various files types relating to Finance, maintained by the General Counsel Legal Counsel reference documents	OGC	CY+15		Confidential



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
OGC13	Reference Files – Recreation	Legal Filing Section 50.0 – Recreation Includes various files types relating to Recreation, maintained by the General Counsel Legal Counsel reference documents	OGC	CY+15		Confidential
OFFICE OF THE GENERAL MANAGER (OGM)						
OGM01	Correspondence	Office of the General Manager letters and logs	OGM	CY+5		Public
OGM02	Form 700 – Statement of Economic Interest	Form 700	OGM	T+7		Public
PAYROLL						
PAY01	Employee Payroll Files	Active and Terminated: Managed from date of hire through termination for payroll related items only. Any changes to payroll master file: (including but not limited to) PAF's for employee setup, position, pay budget charge numbers, tax withholding, deductions, benefits, garnishments, direct deposit, etc.	Payroll	T+7		Public Excluding employee address, phone number and SSI number
PAY02	Payroll Register	Labor cost and employee program.	Payroll	P		Same as above
PAY03	Payroll Reports – District Level	All subsequent reporting for payroll: W-2 forms, Federal Quarterly 941s (Federal Income Tax, Social Security, and Medicare), Ca State Quarterly DE6's (State Income Tax and State Disability Insurance), unemployment quarterly DE6's, Ca annual reconciliation DE7, workers compensation premium statements, pay period reporting for : deferred comp premium statements (457), CALPERS retirement, AFLAC premiums, new hire reporting, direct deposit, GTLI, tax payments & levies, paid-time-off (PTO) records, flexible spending accounts, etc.	Payroll	AU+7		Same as above
PAY04	Payroll Reports - Employee Level	Reports show everything from dates and hours to gross pay, net pay, and all related taxes, deductions, benefits, etc.	Payroll	AU+7		Same as above
PAY05	Timecard Data	Record of employees' attendance	Payroll	AU+6		Same as above
PAY06	Unclaimed Wages	Wages not claimed by employees	Payroll	T+8		Same as above



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
PEST AND VEGETATION MANAGEMENT						
PEST01	Emergency Response Plan	County regulation – Plan includes chemicals used to control gophers and ground squirrels. Verifies that chemicals are used properly.	Pest Management	S	Update continuously	Public
PEST02	Pesticide Safety Information	State regulation – must be posted at all departments. Overview of safe practices and policies for using pesticides safely.	Pest Management	S	CAL OSHA/40CFR 122	Public
PEST03	Pesticide Use Records	Documents the monthly use of pesticides. Created on a monthly basis. Information maintained for three separate counties, Amador, Alpine, and El Dorado. Includes Restricted Use Permits.	Pest Management	CY+2		Public
PEST04	Storage Area Posting	Postings for chemical and hazardous materials storage areas. Labels used to warn individuals and first responders that hazardous materials are contained in that particular area.	Pest Management	S	CAL OSHA/40CFR 122	Public
PEST05	Summary Hazard Communications	Pest management binder containing leaflets and MSDSs. County Agriculture regulations.	Pest Management	CY+2		Public
PURCHASING						
P01	PO Agreements	Purchase Orders that function as a contract with the contractor. Also, supporting materials that substantiate the final purchase order or decision trail.	Purchasing	AU+6		Public
P02	Contracts – Non-CIP	Purchasing contracts. Supporting materials that substantiate the final contract or decision trail, i.e. solicitations (formal and informal), solicitation responses (successful and unsuccessful), correspondence.	Purchasing	AU+6		Public
P03	Cancelled Solicitations – Non-CIP	Cancelled formal and informal written solicitations containing un-awarded written vendor submittals, correspondence, etc.	Purchasing	AU+2		Public
REAL ESTATE MANAGEMENT						
RE01	Agreements – Leases and License	All Leases and License Agreements permitting the use of District real property.	Real Estate	T+5		Public
RE02	Agreement – Reimbursement Files Cal Fire / Growlersburg Inmate Crews	Agreements related to Cal Fire/Growlersburg Inmate crew, including all correspondence.	Real Estate	T+5	Retention is based on termination of agreement	Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
RE03	Contracts – On Call	Contracts for various professional services as needed by the Real Estate Division. Records associated with all correspondence, contract documents, insurance documents, invoices, purchase orders, and payments.	Real Estate	T+5	Retention is based on termination of contract.	Public
RE04	Agreements – Right of Entry, License Agreement	Custom agreements for temporary use of District-owned real property, granted to third parties for a specific purpose.	Real Estate	T+5		Public
RE05	Firewood Sales Program	Records associated the firewood permits issued and accompanying indemnification documentation required of the permittee.	Real Estate	AU+1		Public
RE06	Grant Deeds	All documentation granting real property to the District.	Real Estate	P		Public
RE07	Grants of Easement	All recorded easement rights granted to the District.	Real Estate	P		Public
RE08	Hold Harmless Agreements	Agreements for temporary District use of real property owned by a third party.	Real Estate	T+4	Retention based on completion of temporary District use.	Public
RE09	Road Association Dues / Assessments	Various roads utilized by District personnel to maintain District infrastructure that are privately maintained.	Real Estate	AU+4		Public
RE10	Quitclaims	Real property interests held by the District that are no longer necessary for District purposes. The quitclaim document relinquishes any and all right the District has in a specific parcel of real property.	Real Estate	P		Public
RE11	Timber Harvest	All documents associated with active or proposed timber harvest plans and/or licensed timber operators contracted by the district to harvest timber on district land.	Real Estate	CL+4	Retention based on completion of timber harvest for active plan or year of preparation for proposed plans not carried out.	Public
RE12	Property Appraisal	Documentation of property value appraisals of District property.	Real Estate	CL+10	Retention based on valuation date of appraisal.	Public
RE13	Waiver and Release Agreement	Standard form agreement to allow a third party to enter District-owned real property for a specific purpose and very short duration such as inspection, job walk, or similar activity that can be completed in one or a few days.	Real Estate	T+1	Retention based on completion of access.	Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
RECORDS MANAGEMENT						
RM01	Historical	Historical documents including various reports, pictures, videos, etc.	Records Management	P		Public
RM02	Logs and Spreadsheets	Various logs, including CIP project history, and correspondence tracking logs.	Records Management	P		Public
RM03	Public Records Requests	Requests from public, vendors, contractors, consultants, developers. Includes response from EID and supporting documentation.	Records Management	CL+2		Public
RM04	Records Inventories	Inventory of non-current or inactive records holdings and location, indices.	Records Management	S	Active Document – updated continuously	Public
RM05	Records Management Document Destruction Forms	Documentation of approved record purges. Includes record description, dates, retention policy and approvals from Department Head and General Counsel.	Records Management	P		Public
RM06	Records Retention Schedule	Records retention requirements approved by the Board of Directors	Records Management	S		Public
RECREATION						
REC01	Brochures	Reproductions, printing, mailing, event brochures	Recreation	CY+2		Public
REC02	Camp Tags	Tags used to track vehicles and people when campers are in the park.	Recreation	CY+2		Public
REC03	Cash Receipts	Records of sale from point-of-sale system.	Recreation	AU+5		Public
REC04	Daily Logs	Logs of Ranger activity	Recreation	CY+1		Public
REC05	Employee Calendars	Employees schedules and activities for departmental reference	Recreation	CY+2		Public
REC06	Historical	Historical documents and reports Used for departmental and District-wide historical reference.	Recreation	P		Public
REC07	Mooring Contracts	Annual mooring facility contracts.	Recreation	CY+2		Public
REC08	Park Incident Reports	Records of unacceptable behavior or subpoenas in the park area. Includes photos	Recreation	CY+2		Public
REC09	Photographs / Videos	Non-project related photographs and videos.	Recreation	CY+3		Public
REC10	Policy and Procedures	Policy and procedures manual for recreational procedures.	Recreation	S		Public
REC11	Reservations	Tracking recreational reservations.	Recreation	CY+2		Public
REC12	Season Passes	Documents / logs used to track the sale of season passes sold to individual vehicles, and boats.	Recreation	CY+2		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
RECYCLED WATER COMPLIANCE						
RW01	Commercial Irrigation Plans	Approved irrigation plans for recycled water commercial projects.	Recycled Water	P		Public
RW02	Commercial Lot Files	Includes documentation related to recycled water program compliance requirements such as: standards agreement for recycled water use at non-residential sites, user reclamation plan (URP), onsite inspection forms, for potable service and potable lines extending into the landscape, onsite inspection forms for recycled water service and irrigation system.	Recycled Water	P		Public
RW03	Inspection photographs	Photos of compliance inspections for the construction of onsite recycled water and potable water residential and commercial facilities. Photos are added for new projects and existing non-compliance cases.	Recycled Water	P		Public
RW04	Residential Lot Files	File contains documentation related to the recycled water program compliance requirements including: homebuyer notifications, onsite inspection forms for potable service and potable lines extending into the landscape, onsite inspection forms for the recycled water service and irrigation system, irrigation plans, irrigation plan review approval/failure letters, recycled water orientation exam, non-compliance letters, annual inspection forms.	Recycled Water	P		Public
REGULATORY - STATE AND FEDERAL						
State – Pertains to State safety or environmental regulatory agencies overseeing dams, hydro and other compliance projects.						
ST01	Compliance	Includes confirmation of compliance documentation and supporting documentation for proof of compliance	Regulatory	P		Public
ST02	Correspondence – State Regulatory Compliance	Includes compliance related letters, fax, memos to or from State regulatory agencies.	Regulatory	P		Public
ST03	Projects – State Regulatory Compliance	Project documentation for projects mandated by the State. Includes correspondence, transmittals, photos, videos, reports, inspection reports, emergency action plans, surveys, analysis, contract documents, submittals, as-built drawings, specifications, project manuals, permits, assessments, project completion reports.	Regulatory	P		Public
ST04	Notifications – State Regulatory Compliance	Includes notices letters, memos, or faxes from State agencies, as reminders of specific items or details.	Regulatory	CY+2		Public
ST05	Permits	Permits required by state agencies.	Regulatory	P		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
ST06	Reports – State Regulatory Compliance	Includes information and reports Includes information and reports submitted to State regulatory agencies.	Regulatory	P		Public
ST07	Transmittals – State Regulatory Compliance	Form used to document the transfer of documents to or from State regulatory agencies. This includes the cover letter and the documents being transmitted.	Regulatory	P		
Federal – Pertains to Federal safety or environmental regulatory agencies overseeing dams, hydro and other compliance projects (primarily FERC but can include Army Corps of Engineers and US Fish and Wildlife)						
FED01	Projects –Federal Regulatory Compliance	Project documentation for CIP mandated by FERC or other Federal regulatory agencies. Includes correspondence, transmittals, photos, videos, reports, surveys, analysis, contract documents, submittals, specifications, project manuals, permits, assessments, project completion reports.	FERC	P	Copies remain in corresponding office until no longer needed for departmental reference	Public
FED02	Correspondence – Federal Regulatory Compliance	Letters, memos, faxes to or from Federal regulatory agencies. INCLUDES FERC RELATED ENVIRONMENTAL, ENGINEERING, AND OPERATIONS DOCUMENTS	FERC	P		Public
FED03	Emergency Action Plan	Emergency Action Plan (EAP). Plan of action for emergencies.	FERC	S		Public
FED04	License Compliance	Reports, plans, studies, correspondence and other relevant documentation necessary to demonstrate compliance with Project 184 or other Federal license requirements. INCLUDES FERC RELATED ENVIRONMENTAL, ENGINEERING, AND OPERATIONS DOCUMENTS	FERC	P		Public
FED05	License Documents	Documents Associated with FERC or other Federal licensing, including but not limited to, license amendments, permits, orders, and agreements. INCLUDES FERC RELATED ENVIRONMENTAL, ENGINEERING, AND OPERATIONS DOCUMENTS	FERC	P		Public
FED06	Notifications – Federal Regulatory Compliance	Includes notices letters, memos, or faxes from FERC or other Federal regulatory agencies as reminders of specific items or details.	FERC	CY+2		Public
FED07	Reports – Federal Regulatory Compliance	Includes all reports submitted to Federal regulatory agencies. INCLUDES FERC RELATED ENVIRONMENTAL, ENGINEERING, AND OPERATIONS DOCUMENTS	FERC	P		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
FED08	Transmittals – Federal Regulatory Compliance	Form used to document the transfer of documents to or from Federal agencies. This includes the cover letter and the documents being transmitted. INCLUDES FERC RELATED ENVIRONMENTAL, ENGINEERING, AND OPERATIONS DOCUMENTS	FERC	P		Public
SAFETY AND SECURITY						
SS01	California Highway Patrol - Biennial Inspection of Terminal Reports (BIT)	. Audit entails maintaining list of active Commercial Driver’s License (CDL) holders, DMV Pull Notice program evaluation and DOT drug / alcohol testing program for safety-sensitive CDL holders.	Safety and Security	CY+7	DOT designated EID employee representative (DER); CCR, Title 13, Division 2, Chapter 6.5, Article 6	Public
SS02	Safety Management Reports	Cal/OSHA form 300-log of work related injuries - maintained throughout the year. Cal/OSHA form 301- District injury and illness incident reports and supporting documentation; Safety Committee meeting minutes	Safety and Security	CY+7		Public
SS03	Security Incident Reports	Security Activity Reports (SAR) and video monitoring files documenting malevolent acts involving District critical infrastructure and other assets.	Safety and Security	CY+7	Until pending litigation or prosecution resolved	Public
SS04	Security Plans	District-wide risk assessments and security/emergency plans	Safety and Security	P		Confidential
SS05	Training Records	Employee training / classes regarding safety District wide – include certificates and sign in sheets.	Safety and Security	CY+7		Public
SS06	Workers Compensation	Claims files, reports (originals with ACWA/JPIA)	Safety and Security	T+7		Confidential
SCADA						
SC01	SCADA Database Records for Tier 1 Historian	Applies to data recorded and stored locally at the treatment/generation plants. This data is replicated to a main repository (Tier 2) at Headquarters. Defines the period in which we can delete data from the running base.	SCADA	CY+5		Public
SC02	SCADA Database Records for Tier 2 Historian	Applies to data recorded and stored in the main repository (Tier 2) at Headquarters. Defines the period in which we can delete data from the running base.	SCADA	P		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
UTILITY BILLING						
UB01	Adjustments	Adjustment accounts consist of adding fees, adjusting balance down for leaks form. Form requesting adjustments are attached.	Utility Billing	AU+4		Public
UB02	Agreements - Owner/Tenant	Rental properties – Owner applies for agreement to allow the tenant to be on the account. Includes mobile homes, apartments, property management, etc.	Utility Billing	CY+2	Retain for 2 years	Public
UB03	Billing - Customer Applications - AMI / Small Farm	Small farm schedule F form IRS or approved certification from department of Agriculture	Utility Billing	CY+2		Public
UB04	Billing – Customer Payments	Payments received from District customers, in all formats. Includes customer account records and postings of credit card, electronic or other on-line payments by customers.	Utility Billing	AU+2		Public
UB05	Billing – Customer Payments, Electronic Funds Transfer	EFT – Documentation of electronic funds transfer from customer account to EID account for bill payments. Includes forms and voided checks.	Utility Billing	AU+2		Public
UB06	Billing – Customer Payments, Overpayment Refunds	Refund approval letters for over payment.	Utility Billing	AU+2		Public
UB07	Billing –Disconnect Notices	Copies of notices to customers that are delinquent on their accounts and in jeopardy of shut off.	Utility Billing	AU+2		Public
UB08	Billing Customer Payments, Returned / Bounced Checks	Letter from the bank regarding bounced checks from customers.	Utility Billing	AU+2		Public
UB09	Billing – Customers Returned Mail	Mail returned for non-existing address, etc.	Utility Billing	CM+5	Retain for current month + 5 months	Public
UB10	Billing - Inactive Collections	Monthly reports generated, from Hansen, on all accounts unpaid. Includes 30, 60, 90 day notifications and reports on accounts sent to collections agency.	Utility Billing	AU+2		Public
UB11	Billing and Past Due Output files	Consists of detailed lists of who was billed, date, rate charged, and where billings where sent. Also includes notifications to customers who are past due on their accounts.	Utility Billing	CY+1		Public
UB12	Correspondence	Incoming and outgoing regarding accounts, includes, letters, memos, emails, fax.	Utility Billing	CY+2		Public
UB13	Customer Service Requests	Requests for general assistance or to report issues that require District attention. May include meter service requests, initial/final meter reads and supporting documentation	Utility Billing	P	Hard copies are retained for 6 months.	Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
UB14	Ditch Applications	Annual request for ditch water and acknowledgement of terms.	Utility Billing	CY+2		Public
UB15	Escrow / Lien Demands	Outstanding lien, sale, or refinance. Includes fax and email to and from the title company.	Utility Billing	CY+2	Supporting documents	Public
UB16	Lien / Tax Roll	Assessments of liens against properties for non-payment. Includes liens released, liens sent to tax roll (assessed against property tax). Supporting Documents Originals	Utility Billing	CY+2 P		Public
UB17	Rebates	Rebates to customers for Water Efficient items or appliances.	Utility Billing	CY+2		Public
UB18	Reconciliations	Daily measurements / RRS batch detail report / payment batch summary / cash DRWR detail. Reconciliation of all daily work for cashiering. Includes daily journal tape from register and all payment receipts from cashiering, and checkbook detail for all payment types.	Utility Billing	AU+2		Public
UB19	Reports – School Sewer Reports	Excel files received from the El Dorado County Office of Education for public schools to report annual student and staff counts. Utilized to calculate annual school sewer charges to be billed.	Utility Billing	AU+2	Excel files currently reside on network drive.	Public
UB20	Temporary Water Use Permits	Contractor/Developer applies for a permit for temporary fire hydrant meters for a one-time period of less than one year.	Utility Billing	CL+2		Public
UB21	Visitor Logs	Daily sign in logs of anyone who visits or enters the District Headquarters facility.	Utility Billing	CY+1		Public
WASTEWATER / RECYCLED WATER (Includes Wastewater Collection System)						
WW01	Correspondence	Includes emails, letters, to and from government agencies, to and from customers / permittee's, Regional Water Quality Control Board, Environmental Protection Agency	Wastewater	CY+10		Public
WW02	Daily Log Books	Treatment Plant Operators diary. Tracks daily events and happenings during each shift. Used for operational purposes.	Wastewater	CY+10		Public
WW03	Manuals - O&M	Operations and Maintenance Manuals	Wastewater	S		Public
WW04	Monitoring Results	Lab results for collection system locations	Wastewater Collections	CY+10		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
WW05	Permits	Annual Waste Discharge Permitting, Vapor Recovery Permitting, Hazardous Materials	Wastewater	P		Public
WW06	Permits NPDES	Permit issued by State Water Board. Includes application and amendments, inspections, and Waste Discharge Report (WDR) for collections. Supporting documentation which may include Public Outreach materials, photos, and correspondence associated with permits.	Wastewater Collections	P CY+5		Public
WW07	Reports - NPDES	Reports includes NPDES, monthly, annual and semi-annual: Annual 503, sludge reports, Monthly EPA, DMR, Methyl Mercury, Storm Water Reports, Bypasses and Overflows, and Nani 503, correspondence (incoming and outgoing), back up documentation, statistics, and notice of violations (NOVs)	Wastewater	CY+10		Public
WW08	Reports - Spills	Monthly reports generated due to spills into or out of the collection system. Includes collection system spill reports.	Wastewater	CY+5		Public
WW09	Sludge and Grit Files	Hauling and Disposal of Sludge and Grit	Wastewater	CY+10		Public
WW10	Violations	Waste water violation documentation, incoming and outgoing.	Wastewater	CY+10		Public
WW11	Work Orders	Documentation of work requests and work performed on the maintenance of the collection system. Generated and maintained in Hansen	Wastewater Collections - Hansen	L	Retain for the life of the facility	Public
WW12	Visitor Logs	Daily sign in sheets of visitors entering the wastewater facilities.	Wastewater	CY+1		Public
WATER						
W01	Chemical Deliveries	Documentation of chemical deliveries to water treatment plants. Includes type of chemical, amount and personnel performing delivery and receipt of chemicals.	Water	CY+10		Public
W02	Compliance Orders (NOCO)	Compliance orders issued by the Department of Public Health, including but not limited to Notification to Water Consumers and the State Board (Tier 1, 2 and 3). Includes violation notice, corrective actions and corresponding customer notifications and other correspondence.	Water	CL+3		Public
W03	Correspondence	Incoming and outgoing letters, or memos not related to regulatory or compliance issues. Also includes formal customer contact and project info.	Water	CY+2		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
W04	Daily Log Book	Treatment Plant Operators diary. Tracks daily events and happenings during each shift. Used for operational purposes.	Water	CY+5		Public
W05	Daily Sign-in Sheet	For security purposes, non-District visitors to any treatment plant must sign the daily sign-in sheet. Includes date, time, and purpose of visit.	Water	CY+1		Public
W06	Discharge Reports	Reports submitted to the Water Resources Control Board and US Fish & Wildlife Service regarding planned and unplanned drinking water discharges. Includes chlorine, turbidity and pH info.	Water	CY+10		Public
W07	Lead and Copper Monitoring	Lead and copper tap monitoring data, correspondence, Water Quality Parameter monitoring data and corrosion control studies conducted at system sample points and at home owner' taps.	Water	CY+21		Public
W08	Manual – Operations and Maintenance (O&M)	O&M Manuals – Used as a guideline for equipment repair.	Water	S		Public
W09	Monitoring Plans	Various water monitoring data plans (Bacteriological, Chemical, Disinfectant Byproduct)	Water	S+10		Public
W10	Permits	Drinking water permit and permit amendments	Water	P		Public
W11	Reports - Customer Concern Reports	Customer service request for water quality investigations and results required for monthly and annual reporting to Division of Drinking Water.	Water	CY+5		Public
W12	Report – Drinking Water Quality, Consumer Confidence Report	Annual report to customers regarding drinking water quality.	Water	CY+5		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
W13	<p>Reports – Title 22 Water Monitoring:</p> <ul style="list-style-type: none"> -Primary Standards- Bacteriological Quality -Organic & Inorganic Chemicals -Distribution System Physical Water Quality -Source Water -Radioactivity -Secondary Drinking Water Standards- -Disinfectant Residuals and Byproducts -Surface Water Treatment -Long Term 2 Enhanced Surface Water Treatment Rule 	<p>Water Monitoring reports required by State Water Resources Control Board, Division of Drinking Water. Includes all CCR Title 22 monitoring data throughout the system for bacteriological, primary and secondary drinking water standards, radioactivity, and non-routine water quality sampling data obtained as the result of a line break, maintenance or when system pressure drops below 5 PSI. Also includes monitoring and reports for the Disinfection Byproducts Rule and Surface Water Treatment Rule.</p> <p>Includes all associated microbiological Water Monitoring reports required by State Water Resources Control Board, Division of Drinking Water. Includes all CCR Title 22 monitoring data throughout the system for bacteriological, primary and secondary drinking water standards, radioactivity, and non-routine water quality sampling data obtained as the result of a line break, maintenance or when system pressure drops below 5 PSI. Also includes monitoring and reports for the Disinfection Byproducts Rule and Surface Water Treatment Rule.</p> <p>Includes all associated microbiological and chemical analyses, reports and other correspondence.</p>	Water	CY+10		Public
W14	Safety Data Sheets (SDS)	MSDS – Documentation of all chemicals being used at each facility. Used for emergency and first responders, and operational purposes. Specifies procedures necessary for handling chemicals safely	Water	S		Public
W15	Sanitary Surveys	Watershed report required by Safe Drinking Water Act, updated every 5 years.	Water	CY+10		Public
W16	Sly Park Exemption Data	Data and correspondence regarding the Jenkinson Lake exemption from Water Quality Monitoring due to Body Contact Permit issued by SWRCB-DDW	Water	P		Public
W17	Water Quality Monitoring, Daily - Data Entry	Data from daily water quality monitoring that is entered into spreadsheets. Used for historical purposes and reference.	Water	CY+5		Public
W18	Work Orders	Maintenance records for water system infrastructure. Generated and maintained in Hansen.	Hansen	L		Public



Records Retention Schedule

Record Series No.	Record Series / Type	Record Series / Type Description	Primary Office of Record	Total Retention	Retention Justification/ Citation or Comments	Status
WATER POLICY (See also Office of the General Counsel (OGC))						
WP01	Water Rights	Documentation of water rights		P		Public
WATER USE EFFICIENCY (WUE)						
WUE01	Correspondence	Incoming / Outgoing letters, memos, fax, email.	WUE	CY+2		Public
WUE02	Plumbing Retrofit Forms	Best Management Practices Support - Water Conservation	WUE	CY+4		Public
WUE03	Reports - Water Use Efficiency, Conservation	Best Management Practices Support - California Urban Water Conservation Counsel.	WUE	CY+4		Public
WUE04	Water Waste Violations	Best Management Practices Support - Water Conservation	WUE	CY+4		Public
WUE05	Water Wise Home Audits	Best Management Practices Support - Water Conservation. Service requests for water conservation evaluation or leak detection	WUE	CY+4		Public