

Introduced by: Hibbert at the Request of
the Borough Clerk
Date: 08/17/21
Action: Adopted
Vote: 8 Yes, 0 No, 1 Absent

**KENAI PENINSULA BOROUGH
RESOLUTION 2021-062**

**A RESOLUTION APPROVING A QUARTERLY UPDATE
TO THE BOROUGH RETENTION SCHEDULE**

WHEREAS, sound administrative practices require the borough to keep the retention schedule updated and current; and

WHEREAS, KPB 2.52.030(F) provides for the review and quarterly update of the retention schedule; and

WHEREAS, the records manager continues to address inconsistencies and updates throughout the schedule;

NOW, THEREFORE, BE IT RESOLVED BY THE ASSEMBLY OF THE KENAI PENINSULA BOROUGH:

SECTION 1. The attached revisions amend and add several record series to the schedule in an effort to meet current business practices as well as state and federal laws.

SECTION 2. That the attachments referenced above are approved for adoption into the current Kenai Peninsula Borough Records Retention Schedule.


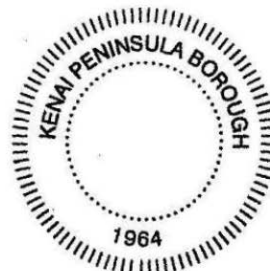
SECTION 3. This resolution becomes effective immediately upon adoption.

ADOPTED BY THE ASSEMBLY OF THE KENAI PENINSULA BOROUGH THIS 17TH DAY OF AUGUST, 2021.



Brent Hibbert, Assembly President

ATTEST:


Jonni Blankenship, MMC, Borough Clerk

Yes: Bjorkman, Carpenter, Chesley, Cox, Dunne, Elam, Johnson, Hibbert

No: None

Absent: Derkevorkian

Finance Cash Management

SCHEDULE No.	DESCRIPTION	RETENTION
FIN.CSH.17	<p>TAX BILLS – REAL & PERSONAL PROPERTY OVER THE COUNTER</p> <p>Invoices to taxpayers returned with payments.</p> <p><i>Note: Checks and stubs received by mail are kept electronic in department <u>from 2012 to current.</u></i></p> <p><u>Total payment amounts only (no remittance information) exist electronically from 2001 - 2011.</u></p>	<p>1 year/Office (e)</p> <p>[6]19 years/ Records Ctr.</p>

Finance Sales Tax

SCHEDULE No.	DESCRIPTION	RETENTION
FIN.STX.04	<p>SALES TAX RETURNS</p> <p>[SALES TAX REGISTRATIONS AND R]Reports completed by businesses and returned to borough. Correspondence, resale and exempt applications. Adjustments to accounts. Guide and compliance forms.</p> <p><u>C = until account is closed.</u></p> <p><u>Note: Complete sales tax returns, including sales tax registration forms, are archived on microfilm prior to August, 2021.</u></p>	<p>[permanent] (m) (v)</p> <p><u>C+1</u> <u>year/Office</u></p> <p><u>9 years/</u> <u>Records Center</u></p>
FIN.STX.12	<p>SALES TAX REGISTRATIONS</p> <p><u>Sales tax registration forms.</u></p>	<p>Permanent (m) (v)</p>

Human Resources

SCHEDULE NO.	DESCRIPTION	RETENTION
PER.ADM.01	<p>EMPLOYEE FILES / PERSONNEL FILES</p> <p>Full-time, part-time, on-call/volunteer, assembly members, board and commission members. Contains application/resume, tax forms, payroll deduction authorizations, test and scores, retirement data, references, evaluations, transfers, promotions/demotions, salary increases/decreases, levies/attachments, deferred compensation data, disciplinary actions. Health and benefit enrollment information.</p> <p>[*SEE ALSO EMPLOYEE RECORDS, ARTICLE 13.1 OF THE COLLECTIVE BARGAINING AGREEMENT]</p> <p><u>C = upon employee's separation from employment.</u></p>	<p>[PERMANENT*] <u>C+ 1 year/Office</u></p> <p><u>49 years/</u> <u>Records Center</u> (v)</p>
PER.ADM.02	<p>EMPLOYEE MEDICAL RECORDS</p> <p>Workers' Comp claims (copies), on-the-job accidents (copies), lost time documentation, pre-hire and periodic physical exams, medical history, correspondence with physicians. Family Medical Leave Act (FLMA); medical leave.</p> <p>Claim files see RSK.ADM.02 and RSK.ADM.05.</p> <p><u>C = upon employee's separation from employment.</u></p>	<p>[PERMANENT] (v)</p> <p><u>C+1[2]</u> year[s]/Office</p> <p><u>49 years/</u> <u>Records Center</u></p> <p>Confidential AS 40.25.120</p>

Risk Management

RSK.SAF.37	DRIVER QUALIFICATION FILES (DQF) The DQF consists of the following: employment application, road test certificate, previous employment check, original driver license check, medical examiner's certificate, annual review, annual state abstract, and list of motor vehicle violations. <u>C = upon employee's separation from employment.</u>	[PERMANENT] <u>C+1</u> <u>year/Office</u> <u>49 years/</u> <u>Records Center</u>
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Service Areas (other than fire & emergency)

SCHEDULE No.	DESCRIPTION	RETENTION
<u>SAB.ADM.04</u>	<u>DEPOSIT BOOKS</u> <u>Bank deposit books.</u>	<u>1 year/Office</u> <u>3 years/</u> <u>Records Center</u>