

Department Name: San Francisco Department of Public Health – Central Administration

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DIVISION	RECORD CATEGORY	TYPE OF RECORD	RETENTION CATEGORY	METHOD OF DISPOSITION	RETENTION PERIOD			REMARKS
					Total	On Site	Off Site	
CPHS – FISCAL/ACCOUNTING - ACCOUNTS PAYABLE & PROCUREMENTS	ADMINISTRATIVE RECORDS	Interdepartmental Work Orders, Worksheets, and Files	2 – Current & 3 – Storage	Shred	7 yrs	3 yrs	4 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - ACCOUNTS PAYABLE & PROCUREMENTS	ADMINISTRATIVE RECORDS	Garbage Liens/Payments	2 – Current & 3 – Storage	Shred	5 yrs	3 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - COST REPORTS	ADMINISTRATIVE RECORDS	Fee Schedules, Patient Rates, Fee Tags, other rates and fee documents	2 – Current & 3 – Storage	Shred	5 yrs	3 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Project Reconciliation Worksheet & Project Files	2 – Current & 3 – Storage	Recycle	7 yrs or project is completed	3 yrs	4 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Position Substitution/Reassignment Worksheets, Job Analysis Questionnaire (JAQ), Personnel Classification Action and Misc. Files	2 – Current & 3 – Storage	Shred	5 yrs	3 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING -	ADMINISTRATIVE RECORDS	Hiring Plan Report, Labor Code Correction Forms	2 – Current & 3 – Storage	Shred	2 yrs	1 yr.	1 yr.	Administrative Decision

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BUDGET								
CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Labor Distribution Report	2 – Current & 3 – Storage	Recycle	5 yrs	2 yrs	3 yr.	Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL ADMINISTRATION	ADMINISTRATIVE RECORDS	Personnel Requisitions	2 – Current	Shred	1 yr.	1 yr.		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – FINANCE OFFICE	ADMINISTRATIVE RECORDS	Subject Matter Files	2 – Current	Recycle	Current Year	Current Year		Administrative Decision
CPHS – FISCAL/ACCOUNTING - COST REPORTS	ADMINISTRATIVE RECORDS	Targeted Case Management (TCM)/Medical Administrative Claims (MAA) Cost Report, Administrative Claims, Agreements, Claiming Plans, Time Surveys, Invoices, Billing Documents, & Other	2 – Current & 3 – Storage	Shred	7 yrs	5 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - COST REPORTS	ADMINISTRATIVE RECORDS	Annual Overhead Reports	2 – Current & 3 – Storage	Shred	7 yrs	5 yrs	2 yrs	Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – FINANCE OFFICE	ADMINISTRATIVE RECORDS	Departmental Appeal Board/HCFA Worksheet	2 – Current	Recycle	3 Years	3 Years		Administrative Decision

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CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Grant Awards, Budget Spreadsheets, Files, Cost Reports, & Other	2 – Current & 3 – Storage	Recycle	7 yrs or longer if there are audit appeals	5 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Health Commission Reports, Revenue and Expenditure Wkshts, Resolutions and Ordinances	2 – Current & 3 – Storage	Shred	5 yrs	3 yrs	2 yrs	Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – FINANCE OFFICE	ADMINISTRATIVE RECORDS	Monthly Financial Indicator Reports	2 – Current	Recycle	Current Year	Current Year		Administrative Decision
CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Phase D BPREP Reports	2 – Current	Recycle	5 yrs	5 yrs		Administrative Decision
CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Budget Spreadsheets, Program Description Reports, Work Papers,	2 - Current	Recycle	5 yrs	5 yrs		Administrative Decision
CPHS – FISCAL/ACCOUNTING - BUDGET	ADMINISTRATIVE RECORDS	Budget Organization Charts	2 – Current	Recycle	2 yrs	3 yrs		Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL ADMINISTRATION	ADMINISTRATIVE RECORDS	Budget Binders, Supplemental Appropriation Requests	2 – Current & 3 – Storage	Recycle	3 yrs	2 yrs	1 yr.	Administrative Decision
DEPARTMENT OF	ADMINISTRATIVE	Phase D Reports	2 – Current	Recycle	7 Years	7 Years		Administrative

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PUBLIC HEALTH – FINANCE OFFICE	RECORDS							Decision
DEPARTMENT OF PUBLIC HEALTH – FINANCE OFFICE	ADMINISTRATIVE RECORDS	Executive Budget Committee Agendas	2 – Current	Recycle	Current Year	Current Year		Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL ADMINISTRATION	ADMINISTRATIVE RECORDS	Audit Files, Misc.	2 – Current & 3 – Storage	Recycle	7 yrs	5 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - ACCOUNTS PAYABLE & PROCUREMENTS	ADMINISTRATIVE RECORDS	ADPICS/FAMIS Documents (Contract Orders/Payments, Direct Payment Requests/Vouchers, Departmental Interface Audit Trail Report by Interface Transaction from Controller’s Office)	2 – Current & 3 - Storage	Shred	7 yrs	5 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - ACCOUNTS PAYABLE & PROCUREMENTS	ADMINISTRATIVE RECORDS	All Other ADPICS/FAMIS Documents	2 – Current & 3 – Storage	Shred	5 yrs	3 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL	ADMINISTRATIVE RECORDS	Administrative Code	1 - Permanent	Do Not Destroy	Permanent	Indefinitely		Administrative Decision

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ADMINISTRATION								
DEPARTMENT OF PUBLIC HEALTH – FINANCE OFFICE	ADMINISTRATIVE RECORDS	Ordinance Changes	2 – Current	Recycle	Current Year	Current Year		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – FINANCE OFFICE	ADMINISTRATIVE RECORDS	FAMRS060 Labor Distribution by Organization and Index Code	2 – Current	Shred	5 years	2 years	3 years	Secure permission from San Francisco Employees’ Retirement System prior to destruction for items related to payroll checks
CPHS – FISCAL/ACCOUNTING - COST REPORTS	ADMINISTRATIVE RECORDS	Bank Reconciliation, Receipts Processing Forms	2 – Current & 3 – Storage	Shred	5 yrs	3 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL ADMINISTRATION	ADMINISTRATIVE RECORDS	Appropriation Carry forward Requests	2 – Current & 3 – Storage	Recycle	3 yrs	2 yrs	1 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL ADMINISTRATION	ADMINISTRATIVE RECORDS	References, Misc. Books, Manuals	1 - Permanent	Do Not Destroy	Permanent	Indefinitely		Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL ADMINISTRATION	ADMINISTRATIVE RECORDS	Department’s Authorized Signatories	1 - Permanent	Do Not Destroy	Permanent (updated as often as necessary)	Indefinitely		Administrative Decision

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CPHS – FISCAL/ACCOUNTING - ACCOUNTS PAYABLE & PROCUREMENTS	ADMINISTRATIVE RECORDS	State Funded Programs (CCS, CHDP, CHIP, Maintenance of Effort, County Health Expenditures, and other documents)	2 – Current & 3 – Storage	Shred	7 yrs	5 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - COST REPORTS	ADMINISTRATIVE RECORDS	Federal Cash Reimbursement & Federal Cash Management Report	2 – Current & 3 – Storage	UCSF	7 yrs	5 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - FISCAL ADMINISTRATION	ADMINISTRATIVE RECORDS	Correspondence – In/Out, Misc.	2 – Current & 3 – Storage	Recycle	5 yrs	3 yrs	2 yrs	Administrative Decision
CPHS – FISCAL/ACCOUNTING - ACCOUNTS PAYABLE & PROCUREMENTS	ADMINISTRATIVE RECORDS	Claim for Refunds, Non-Employee Claims, and other claims	2 – Current & 3 – Storage	Shred	5 yrs	3 yrs	2 yrs	Administrative Decision
COMMUNITY PUBLIC HEALTH SERVICES (CPHS) - BUREAU OF RECORDS & STATISTICS	PUBLIC HEALTH RECORDS REPORTABLE	Birth and Death Certificate including all documents that modify certificate such as sealing notices & amendments and all abstracts or indices related thereto	1 – Permanent	Do Not Destroy	Permanent (copies kept on-site and back-up off site)	Indefinitely	Indefinitely	Code §6350 et. Seq. Health & Safety §26205.5
COMMUNITY PUBLIC HEALTH SERVICES	PUBLIC HEALTH RECORDS	Micrographic Copies of Birth & Death Certificates	1 - Permanent	Do Not Destroy	Permanent (copies kept	Indefinitely	Indefinitely	Code §6350 et. Seq. Health &

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(CPHS) - BUREAU OF RECORDS & STATISTICS	REPORTABLE				on-site and back-up off site)			Safety §26205.5
COMMUNITY PUBLIC HEALTH SERVICES (CPHS) - BUREAU OF RECORDS & STATISTICS	PUBLIC HEALTH RECORDS REPORTABLE	Electronic copies of Birth Certificates	1 - Permanent	Do Not Destroy	Permanent	Indefinitely		Code §6350 et. Seq. Health & Safety §26205.5
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL - PAYROLL	ADMINISTRATIVE RECORDS	FICA/SDI Problem Description Forms	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL - PAYROLL	ADMINISTRATIVE RECORDS	PARS	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL -	ADMINISTRATIVE RECORDS	PDF Problem Description Forms	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco

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PAYROLL								Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Retroactive Payments	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Payroll Forms (Retirement/Health Services Processing)	2 – Current	Shred	5 years after separation from service	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d) • Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF PUBLIC HEALTH –	ADMINISTRATIVE RECORDS	Payroll Deduction Authorization/Cancellation	2 – Current	Shred	5 years after separation	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d)

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PERSONNEL – PAYROLL		Forms			from service			<ul style="list-style-type: none"> Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Word Processing/Bi-lingual approval letters	2 – Current	Shred	5 years after separation from service	5 years	0	
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Uniform allowance	2 – Current	Shred	5 years after separation from service	5 years	0	
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Inquiries from D.A. (family support), Franchise Tax Board, IRS, Insurance, EDD (unemployment/SDI), Colonial, Subpoenas, etc.	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF	ADMINISTRATIVE	W-2 file	2 – Current	Shred	5 years after	5 years	0	Secure permission

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PUBLIC HEALTH – PERSONNEL – PAYROLL	RECORDS				separation from service			from San Francisco Employees' Retirement System prior to destruction for items related to payroll.
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Timesheets	2 – Current	Shred	5 years after separation from service	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d) • Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Overtime reports	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll.

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DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Comp time sheets	2 – Current	Shred	5 years after separation from service	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d) • Secure permission from San Francisco Employees’ Retirement System prior to destruction for items related to payroll
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Misc. Payroll reference documents	2 – Current	Shred	5 years after separation from service	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d) • Secure permission from San Francisco Employees’ Retirement System prior to destruction for items related to payroll
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL –	ADMINISTRATIVE RECORDS	Report 940 (Employee Tax Status Report)	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco

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PAYROLL								Employees' Retirement System prior to destruction for items related to payroll
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Report 10 (Payroll/Deduction Register) Microfiche	2 – Current	Shred	5 years after separation from service	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d) • Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Report C121 (Timekeepers Ref. Report) microfiche	2 – Current	Shred	5 years after separation from service	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d) • Secure permission from San Francisco Employees' Retirement System prior to destruction for

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DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Time Roster	2 – Current	Shred	5 years after separation from service	5 years	0	<ul style="list-style-type: none"> • Labor Code 1174(d) • Secure permission from San Francisco Employees’ Retirement System prior to destruction for items related to payroll
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Workers Compensation	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco Employees’ Retirement System prior to destruction for items related to payroll
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	W-4 form	2 – Current	Shred	5 years after separation from service	5 years	0	Secure permission from San Francisco Employees’ Retirement System

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DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	History Sheets (will be removed 1 yr. after employee passed away)	1 – Permanent	Do Not Destroy	Permanent	1 yr. after employee passed away	Indefinitely	
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL – PAYROLL	ADMINISTRATIVE RECORDS	Report 936 (Time Roster Codes Report)	2 – Current	Shred	1 year	1 year		Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll
CPHS – RECORDS & STATISTICS	ADMINISTRATIVE RECORDS	Burial Permits (copies 1 & 3)	2 – Current	Recycle	1 Year	1 Year		Health & Safety Code Section 10306
CPHS – RECORDS & STATISTICS	ADMINISTRATIVE RECORDS	Application for Certified Copies	2 – Current	Recycle	5 Years	5 Years		Administrative Decision
CPHS – RECORDS & STATISTICS	ADMINISTRATIVE RECORDS	Employee Timesheets	2 – Current	Recycle	5 Years	5 Years		• Administrative Decision
CPHS – RECORDS & STATISTICS	ADMINISTRATIVE RECORDS	Personal Correspondence-- Request for vital records	2 – Current	Recycle	3 Months	3 Months		Administrative Decision
CPHS – RECORDS &	ADMINISTRATIVE	Official Correspondence--	2 – Current	Recycle	3 Months	3 Months		Administrative

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STATISTICS	RECORDS	Information from State Office						Decision
CPHS – RECORDS & STATISTICS	ADMINISTRATIVE RECORDS	Birth Certificate Lists (List of certificates sent to DPH by Reporting Hospitals)	1 - Permanent	Do Not Destroy	Permanent (copies kept on-site and back-up off site)	Indefinitely	Indefinitely	Administrative Decision
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Occupational medicine records, including first aid records	2 – Current & 3 – Storage	Shred	Retain for duration of employment plus 30 years	5 Years	After 5 Years	8CCR3204
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Occupational exposure and exposure assessment records This includes industrial hygiene data and may include Material Safety Data Sheets if used as part of the assessment. Definition is very broad and applies to most technical reports and correspondence generated by OSH where as exposure assessment is made. This is a majority of our reports.	2 – Current & 3 – Storage	Recycle	30 Years	5 Years	After 5 Years	8CCR3204
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Injury & illness records which include the Employers First Report of Occupational	2 – Current & 3 – Storage	Recycle	Retain for a minimum of 5 years after	6 Years	After 6 years	8CCR1407 Note: Often needed longer as

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		Injury, the OSHA 200 Log Supervisors Incident Investigation Report, etc.			the year to which the record pertains.			worker's compensation claim may remain open for future medical treatment
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Injury and Illness Prevention Program Records	2 – Current & 3 – Storage	Recycle	5 Years	5 Years	After 5 years	8CCR3203 Required for a minimum of 1 years, but should be retained for at least 5 years
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	OSH Training	2 - Current	Recycle	1 Year	1 Year		8CCR3204
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Bloodborne pathogen training records	2 – Current	Recycle	3 Years after the date of training	3 Years		8CCR5193
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Material Safety Data Sheets	2 - Current	Recycle	Duration of use of the material or 30 years if the MSDS is part of an exposure assessment	Duration of use or 30 years		
CPHS –OCCUPATIONAL HEALTH & SAFETY	ADMINISTRATIVE RECORDS	Lead exposure assessment data	2 – Current & 3 – Storage	Recycle	40 years or duration of	5 Years	After 5 years	8CCR5216

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(OHS)					employment plus 20 years			
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Lead medical removal records	2 – Current & 3 – Storage	Shred	Duration of employee’s employment with CCSF	5 Years	After 5 years	8CCR5216
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Radiation license information	2 – Current & 3 – Storage	Recycle	As long as we hold the license	3 Years	After 3 years	10CFR20L
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Asbestos training records	2 – Current & 3 – Storage	Recycle	1 year beyond duration of employment of the employee to whom the records pertain.	5 years	After 5 years	8CCR5208 Note: This is employment by CCSF not DPH
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Worker’s Compensation loss control reports and specific case data	2 – Current	Recycle or shred if contains nec. info.	5 Years minimum	5 Years minimum		Not legally mandated. Needed to manage on-going worker’s compensation cases and provide management reports.
CPHS –OCCUPATIONAL	ADMINISTRATIVE	Annual budget and	2 – Current	Recycle	5 years	5 years		Not legally

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HEALTH & SAFETY (OHS)	RECORDS	expenditure information						mandated
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Recruitment & selection information and documentation	2 – Current	Shred	5 Years			May be required by HR/EEO at the time Civil Service examination are given
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Personnel records, performance appraisal, etc.	2 - Current	Shred	Duration of employment + 5 years	Duration of employment + 5 years		Secure permission from San Francisco Employees' Retirement System prior to destruction for items related to payroll checks, time cards & related documents.
CPHS –OCCUPATIONAL HEALTH & SAFETY (OHS)	ADMINISTRATIVE RECORDS	Regulations and technical information	2 – Current	Recycle	As long as needed and current	As long as needed and current		
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	Certified Contract	2 – Current	Recycle	Life of Contract plus 5 years	Life of Contract plus 5 years		CFR 420.302(d)
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS	ADMINISTRATIVE RECORDS	Contract Support Documents	2 – Current	Recycle	Life of Contract plus 5 years	Life of Contract plus 5 years		Legal Counsel

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MANAGEMENT								
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	Contract Development/Working Papers	2 – Current	Recycle	Life of Contract plus 2 years	Life of Contract plus 2 years		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	Contract Working Drafts	2 – Current	Shred	Until Contract is Certified	Until Contract is Certified		
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	Compliance Documents	2 – Current	Recycle	3 years	3		Legal Counsel
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	RFP (including proposals in response to the RFP)	2 – Current	Recycle	Life of the RFP plus 1 years	5		Legal Counsel
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	Proposals in response to an RFP	2 – Current	Recycle	2 years	2		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	List of Contracts	2 – Current	Recycle	2 years	2		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH –	ADMINISTRATIVE RECORDS	Laws, and City Charter, Admin. Code, rules,	2 – Current	Recycle	As long as in effect	2		Administrative Decision

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CONTRACTS MANAGEMENT		regulations, policies & procedures on contracts						
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	Board of Supervisors’ Resolutions to apply, accept & expend grants	2 – Current	Recycle	3 years	2		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – CONTRACTS MANAGEMENT	ADMINISTRATIVE RECORDS	Grant Reports	2 – Current	Recycle	5 years	5 years		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	DPH Labor Force Statistics: annual labor force review of Department’s labor force by race and gender (EEO-4 & DFEH-OCP-002)	2 – Current	Shred	1 year by law	1 yr.	5-10 yrs	1964 Title VII of the Civil Rights Act, as amended and California Fair Employment and Housing Act
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	EEO Complaint Log: record of complaints of discrimination filed against DPH. Categories of log include: complainant name, work location, respondent, basis and specific charges, date complaint filed, disposition of investigation and staff person assigned.	2 – Current	Shred	1 year	2 yrs	5-10 yrs	Administrative Decision
DEPARTMENT OF	ADMINISTRATIVE	EEO Investigation File:	2 – Current	Shred	1 yr. by law	2 yrs	5-10 yrs	1 yr. per 1964

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PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	RECORDS	record and documents of complaint investigation. Includes: intake notes, witnesses and Department’s response, and any other relevant documentation and notes.			or until complaint complete lawsuit cycle.			Title VII of the Civil Rights Act, as amended and California Fair Employment and Housing Act. 2+ yrs per administrative decision.
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	Bilingual Services: Testing and Language Certification: Record of employee passing language exam and program manager’s request and justification for special working condition.	1 - Permanent	Do Not Destroy	current year	5 Years	Indefinitely	1979 Federal Office of Civil Rights (OCR) Settlement Agreement with DPH.
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	Bilingual Services: Log of DPH Bilingual Employees by name, classification and languages spoken.	1 - Permanent	Do Not Destroy	current and entered in employee file	5 Years	Indefinitely	1979 Federal Office of Civil Rights (OCR) Settlement Agreement with DPH.
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	African American Health Services Specialist Certification: Record of employee course work, job experience, passing of oral	1 - Permanent	Do Not Destroy	current and entered in employee file	5 Years	Indefinitely	Administrative Decision

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		exam, program manager's request and justification for special working condition.						
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	Gay Health Services Certification: Record of employee course work, job experience, passing of oral exam, program manager's request and justification for special working condition.	1 - Permanent	Do Not Destroy	current and entered in employee file	5 Years	Indefinitely	Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	EEO Training: Attendance Log - Record of employees who attend EEO training.	1 - Permanent	Do Not Destroy	current	5 Years	Indefinitely	Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – EQUAL EMPLOYMENT OPPORTUNITY (EEO)	ADMINISTRATIVE RECORDS	Recruitment Records: DPH's Affirmative Action recruitment plans/classification, recruitment activities /permanent and provisional selection processes, job announcements, applicant resumes, etc.	2 – Current	Shred	current year	Current Year		1964 Title VII of the Civil Rights Act, amended, California Fair Employment and Housing Act, and DHR's practice to review selection process of City employees.
DEPARTMENT OF PUBLIC HEALTH –	ADMINISTRATIVE RECORDS	Agendas/Minutes	1 – Permanent	Do Not Destroy	Permanent	Indefinitely		Administrative Decision

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HEALTH COMMISSION								
DEPARTMENT OF PUBLIC HEALTH – HEALTH COMMISSION	ADMINISTRATIVE RECORDS	Tapes of Meetings	2 – Current	Shred	30 Days	30 Days		Brown Act
DEPARTMENT OF PUBLIC HEALTH – HEALTH COMMISSION	ADMINISTRATIVE RECORDS	Packets	2 – Current	Shred	3 Years	3 Years		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – HEALTH COMMISSION	ADMINISTRATIVE RECORDS	Resolutions	1 - Permanent	Do Not Destroy	Permanent	Indefinitely		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – HEALTH COMMISSION	ADMINISTRATIVE RECORDS	Correspondence	2 – Current	Shred	1 Year	1 Year		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – HEALTH COMMISSION	ADMINISTRATIVE RECORDS	Files - Information	2 – Current	Shred	1 Year	1 Year		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – HEALTH COMMISSION	ADMINISTRATIVE RECORDS	Rules of Order	1 - Permanent	Do Not Destroy	Permanent	Indefinitely		Administrative Decision
DEPARTMENT OF	ADMINISTRATIVE	Personnel Action Report	2 – Current	Shred	5 Years	5 Years		Administrative

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PUBLIC HEALTH – HEALTH COMMISSION	RECORDS							Decision
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL	ADMINISTRATIVE RECORDS	Personnel Transfer	2 – Current		Records to recurring department within 5 working days of employee separation retain photocopy	Records to recurring department within 5 working days of employee separation retain photocopy		<ul style="list-style-type: none"> These Guidelines, adopted by the Civil Service Commission at its meeting of April 6, 1992, are effective on May 1, 1992: <ol style="list-style-type: none"> Charter §3.661 General Powers and Duties Civil Service Commission Rule 30 - Personnel Records. City Attorney’s Opinion.
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL	ADMINISTRATIVE RECORDS	Personnel Separation	2 – Current		5 calendar years from separation date	5 calendar years from separation date		
DEPARTMENT OF PUBLIC HEALTH –	ADMINISTRATIVE RECORDS	Employment History Summary	1 - Permanent	Do Not Destroy	Permanent	5 Years	Indefinitely	

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PERSONNEL								
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL	ADMINISTRATIVE RECORDS	Administrative files personnel-related records of an employee not kept in personnel folders: <ul style="list-style-type: none"> • Discrimination Complaints, Investigations, Resolutions. • Grievances • Background investigation reports and results of polygraph examinations (including confidential statements by previous employers) • Criminal Records. • Medical Records, including: <ul style="list-style-type: none"> - Pre-employment medical examination records - Fitness for duty medical records - Catastrophic illness documents - Result of Psychological Testing 	2 – Current	Shred	5 years if there is no litigation or review by regulatory agency pending	5 Years	0	

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					Total	On Site	Off Site	
		<ul style="list-style-type: none"> • Recruitment files, including applications and resumes of applicants. • Conflict of Interest statements • Unfair Labor Practice Complaints or contract disputes. • Sealed documents (e.g. record sealed by MOU) • Workers' Compensation records. 						
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL	ADMINISTRATIVE RECORDS	Supervisor's File	2 - Current	Shred	Retained only as long as necessary forwarded to Personnel file	Retained only as long as necessary, forwarded to Personnel file		
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL	ADMINISTRATIVE RECORDS	INS Form I-9 file Employment Eligibility Verification	2 – Current	Shred	3 years or one year after separation, whichever is longer	3 years or one year after separation, whichever is longer		

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DEPARTMENT OF PUBLIC HEALTH – PERSONNEL	ADMINISTRATIVE RECORDS	Employee Pay Records File	1 – Permanent	Do Not Destroy	Permanent	5 Years	Indefinitely	San Francisco Administrative Code
DEPARTMENT OF PUBLIC HEALTH – PERSONNEL	ADMINISTRATIVE RECORDS	Former Employees File (a folder of original or photocopied employment history form)	2 – Current	Shred	5 years after separation	0	Indefinitely	
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	DPH Annual Reports	1 – Permanent	Do Not Destroy	Permanent	Indefinitely		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	Policy Papers and Positions	2 – Current & 3 – Storage	Shred	3 years, then storage	3 years, then storage		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	Grant Applications	2 – Current & 3 – Storage	Shred	2 years, then storage	2 years, then storage		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	Legislative Analyses	2 – Current & 3 – Storage	Shred	2 years, then storage	2 years, then storage		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	Needs Assessments	1 – Permanent	Do Not Destroy	3 years, then storage	3 years, then storage		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	Various health-related publications (non-DPH)	2 – Current & 3 – Storage	Shred	5 years, then storage	5 years, then storage		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH –	ADMINISTRATIVE RECORDS	Mayor Summit(s)	2 – Current & 3 – Storage	Do Not Destroy	2 years, then storage	2 years, then storage		Administrative Decision

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POLICY & PLANNING								
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	DPH Health Initiatives	2 – Current & 3 – Storage	Do Not Destroy	5 years, then storage	5 years, then storage		Administrative Decision
DEPARTMENT OF PUBLIC HEALTH – POLICY & PLANNING	ADMINISTRATIVE RECORDS	Personnel Files	1 – Permanent	Do Not Destroy	Permanent	Indefinitely		
DEPARTMENT OF PUBLIC HEALTH – PUBLIC RELATIONS	ADMINISTRATIVE RECORDS	Public Record Requests	2 – Current	Shred or delete electronic copies	2 Years	0		Administrative Decision