

Marion County Children Services

Schedule of Retention and Disposition

Schedule Number	Record Title and Description	Retention Period	Media Type	For Use by Approving Agency
ADMINISTRATIVE				
05-1	Accident/Incident Reports (personal or property damages)	2 yrs. If no claim pending	Paper/Electronic	
05-2	Annual Reports	Permanent (1 copy)	Paper/Electronic	
05-3	Applications for Employment (not hired)	1 yr.	Paper/Electronic	
05-4	Audit Reports (federal, state, local)	Permanent (1 copy)	Paper/Electronic	
05-5	Bids/Proposals	3 yrs. If audited	Paper/Electronic	
05-6	Blank Forms (obsolete or superseded)	30 days after obsolete	Paper/Electronic	
05-7	Contracts with Service Providers	5 yrs. If audited	Paper/Electronic	
05-8	Employee Payroll Records	Permanent	Paper	
05-9	Employee Sick Leave/Vacation Records	5 yrs. After term	Paper	
05-10	Equipment Inventory	5 yrs. If audited	Paper/Electronic	
05-11	Individual Personnel Records	5 yrs. After term	Paper	
05-12	Job Descriptions	Until supersede or obsolete	Paper/Electronic	
05-13	Job Vacancy postings, and interview questions from applicants not hired	7 yrs. After position is filled or decision not to fill position	Paper/Electronic	
05-14	Maintenance/Service Contracts on Equipment	During life of equipment + 1 yr. after audit	Paper/Electronic	
05-15	Non-case related correspondence (letters, calendars, notes, etc.)	1 yr. from date created	Paper/Electronic	
05-16	Personal notes on various subjects	When no admin. Value	Paper/Electronic	
05-17	Procurement Information	4 yrs. If audited	Paper/Electronic	
05-18	Quotes/Bids	When no admin. Value	Paper/Electronic	
05-19	SSRMS Sheets/Disks/Reports	4 yrs. If audited	Paper/Electronic	
05-20	Email Records Sent & Received	A. Delete only after printed for file relevant to listing in retention schedule B. If not listed in the retention schedule delete only after no longer maintaining administrative value	Paper/Electronic	
FISCAL				
05-21	Annual Budgets	Permanent	Paper/Electronic	
05-22	Annual Financial Reports	Five Years	Paper/Electronic	
05-23	Annual Statistical Reports	Permanent	Paper/Electronic	
05-24	Expenditures & Receipt Reports	5 yrs. If audited	Paper/Electronic	
05-25	Leave Requests	3 yrs. If audited	Paper/Electronic	
05-26	Pay-In to County Treasurer	5 yrs. If audited	Paper/Electronic	
05-27	Purchase Orders	4 yrs. If audited	Paper	
05-28	Receipt Books	5 yrs. If audited	Paper	
05-29	Time Sheets	3 yrs.	Paper/Electronic	
SOCIAL SERVICES				
05-30	Adoption Records	Permanent	Paper	
05-31	Foster Children Case Records	Permanent	Paper	
05-32	Foster Home Case Files	5 yrs. After services ends	Paper	
05-33	Investigative Case Files	5 yrs. After investigation complete	Paper	
05-34	Meeting Minutes	5 yrs. Provided audited	Paper/Electronic	
05-35	ODJFS 4262 Children Receiving Services	5 yrs. Provided audited	Paper	
05-36	ODJFS 4269 Adoption Report	5 yrs. Provided audited	Paper	
05-37	Children's Home Death Records	Permanent	Paper/Electronic	
05-38	Children's Home Indenture Records	Permanent	Paper/Electronic	