

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
UTILITIES / ELECTRIC UTILITY								
Utilities / Lead Div.	UT-001	Confined Space Entries / Hot Work Permits	2 years		Mag, Ppr			8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6) GC §34090
Utilities / Electric Utility	UT-002	Drawings / As-Builts / Record Drawings - (Electricity)	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes (after QC)	Department Preference; 18 CFR 125.2 & 125.3; GC §34090
City Clerk	UT-003	Easements / Utility Easements	P	Yes	Mag, Mfr, OD, Ppr	S	Yes: After QC	Department Preference (copies); GC §34090.7
Utilities / Electric Utility	UT-004	Electric Utility Regulatory Agency Audits: CEC, CFTC, CPUC, DOE, EPA, FERC, NERC, NPDES, WECC, etc.	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Utilities / Electric Utility	UT-005	Electric Utility Regulatory Agency Compliance Reports & Confirmations: , CEC, CFTC, CPUC, DOE, EPA, FERC, NERC, NPDES, WECC, etc.	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Utilities / Electric Utility	UT-006	Electric Utility Regulatory Agency Correspondence: CEC, CFTC, CPUC, DOE, EPA, FERC, NERC, NPDES, WECC, etc.	Minimum 10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Utilities / Electric Utility	UT-007	Electric Utility Regulatory Agency Inspections: , CEC, CFTC, CPUC, DOE, EPA, FERC, NERC, NPDES, WECC, etc.	10 years		Mag, Mfr, OD, Ppr	S / I	Yes (after QC)	Department Preference; GC §34090
Utilities / Lead Div.	UT-008	Generator Operation Logs & Inspections	5 years		Mag, Ppr			AQMD Rule 1470; Form 400–E–13a instructions; GC §34090
Utilities / Lead Div.	UT-009	Lockout/Blockout - Lockout/Tagout	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Cal/OSHA requests 3 years of documents during audits; GC §34090
Lead Dept.	UT-010	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment	Yes	Mag, Ppr			Department Preference; GC §34090 et. seq.

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Lead Dept.	UT-011	Pressure Vessel Certifications or Permits (Air Compressors, Propane, etc.)	Expiration of Certificate or Permit		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §34090 et. seq.
Utilities / Lead Div.	UT-012	Underground Service Alerts (USAs) / Dig Alerts	3 years		Mag, Ppr			Department Preference (the Regional Notification Center has the obligation to retain the notice for 3 years); GC §§4216.2(f) & 4216.3(e), 34090
Division Providing Service / Work	UT-013	Work Orders / Service Requests / Asset Management / Service Orders - CRM / CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
Division Providing Service / Work	UT-014	Work Orders / Service Requests / Asset Management / Service Orders - All Information Entered in CRM / CMMS Database (Paper drafts)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §34090
Division Providing Service / Work	UT-015	Work Orders / Service Requests / Asset Management / Service Orders - NOT entered in CRM / CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Preference; CCP §§338 et seq., 340 et seq., 342, GC §34090
UTILITIES / MAINTENANCE / ABOVE-GROUND UTILITIES (Maintenance Planning)								
Utilities / Above-Ground Utilities (Maintenance Planning)	UT-016	Aboveground Diesel Fuel Storage Tanks (Agency Owned) Spill Prevention Control and Countermeasures (SPCC), Inspections, Integrity Testing, Maintenance, Repairs	20 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; applies to both Tier I and Tier II Tanks; (Tier II tanks are required to have an integrity test every 20 years); EPA recommends that formal test records or reports be retained for the life of the container; GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Above-Ground Utilities (Maintenance Planning)	UT-017	Maintenance Planning	Minimum 2 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference (becomes budgets, CIP projects, other records); GC §34090
UTILITIES / MAINTENANCE / ABOVE-GROUND UTILITIES (Sewer)								
Utilities / Lead Div.	UT-018	Confined Space Entries / Hot Work Permits	2 years		Mag, Ppr			8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6) GC §34090
Utilities / Lead Div.	UT-019	Lockout/Blockout - Lockout/Tagout	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Cal/OSHA requests 3 years of documents during audits; GC §34090
Lead Dept.	UT-020	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment	Yes	Mag, Ppr			Department Preference; GC §34090 et. seq.
Division Providing Service / Work	UT-021	Work Orders / Service Requests / Asset Management / Service Orders - CRM / CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
Division Providing Service / Work	UT-022	Work Orders / Service Requests / Asset Management / Service Orders - All Information Entered in CRM / CMMS Database (Paper drafts)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §34090
Division Providing Service / Work	UT-023	Work Orders / Service Requests / Asset Management / Service Orders - NOT entered in CRM / CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Preference; CCP §§338 et seq., 340 et seq., 342, GC §34090
UTILITIES / MAINTENANCE / ABOVE-GROUND UTILITIES (Water)								
Utilities / Lead Div.	UT-024	Confined Space Entries / Hot Work Permits	2 years		Mag, Ppr			8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6) GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES
(Electricity, Sewer, Solid Waste, Water, Utility Billing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Lead Div.	UT-025	Lockout/Blockout - Lockout/Tagout	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Cal/OSHA requests 3 years of documents during audits; GC §34090
Lead Dept.	UT-026	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment	Yes	Mag, Ppr			Department Preference; GC §34090 et. seq.
Division Providing Service / Work	UT-027	Work Orders / Service Requests / Asset Management / Service Orders - CRM / CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
Division Providing Service / Work	UT-028	Work Orders / Service Requests / Asset Management / Service Orders - All Information Entered in CRM / CMMS Database (Paper drafts)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §34090
Division Providing Service / Work	UT-029	Work Orders / Service Requests / Asset Management / Service Orders - NOT entered in CRM / CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Preference; CCP §§338 et seq., 340 et seq., 342, GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
UTILITIES / MAINTENANCE / ELECTRIC								
Utilities / Maintenance / Electric Utility	UT-030	Capital Improvement Projects (CIP): ADMINISTRATION File (Where Utilities is the Lead - Electric Distribution Facilities) Project Administration, Certified Payrolls, Community Outreach / Notifications, Project Schedules, Progress meetings, Punch Lists, Real Estate Appraisals, RFIs & Responses, Temporary Easements, Construction Manager's Logs, Daily Inspections, Daily Logs, Stormwater compliance, etc.	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Some grant funding agencies require audits; Statute of Limitations for Errors & Omissions is 10 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; CCP §337 et. seq., GC §34090
Utilities / Maintenance / Electric Utility	UT-031	Capital Improvement Projects (CIP): PERMANENT File / Scanned Records (Where Utilities is the Lead - Electric Distribution Facilities) Specifications / RFP & Addenda, Agreement / Contract, Successful Proposal, Change Orders, Geotechnical Studies & Reports, Operations & Maintenance Manuals (O&M Manuals,) Materials Testing Reports, Grading Permits, Hazardous Materials Plans, Notice of Completion, Photos, Soil Reports, Studies, Submittals, Surveys, etc.	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; retained for disaster preparedness purposes; GC §34090
Utilities / Maintenance / Projects	UT-032	Drawings / As-Builts / Record Drawings - (Electric Distribution Facilities)	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes (after QC)	Department Preference; 18 CFR 125.2 & 125.3; GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
UTILITIES / MAINTENANCE / PROJECTS								
Utilities / Maintenance / Projects OR Construction	UT-033	Capital Improvement Projects (CIP): ADMINISTRATION File (Where Utilities is the Lead - Water or Wastewater Facilities) Project Administration, Certified Payrolls, Community Outreach / Notifications, Project Schedules, Progress meetings, Punch Lists, Real Estate Appraisals, RFIs & Responses, Temporary Easements, Construction Manager's Logs, Daily Inspections, Daily Logs, Stormwater compliance, etc.	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Some grant funding agencies require audits; Statute of Limitations for Errors & Omissions is 10 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; CCP §337 et. seq., GC §34090
Utilities / Maintenance / Projects	UT-034	Capital Improvement Projects (CIP): PERMANENT File / Scanned Records (Where Utilities is the Lead - Water or Wastewater Facilities) Specifications / RFP & Addenda, Agreement / Contract, Successful Proposal, Change Orders, Geotechnical Studies & Reports, Operations & Maintenance Manuals (O&M Manuals,) Materials Testing Reports, Grading Permits, Hazardous Materials Plans, Notice of Completion, Photos, Soil Reports, Studies, Submittals, Surveys, etc.	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; retained for disaster preparedness purposes; GC §34090
Utilities / Maintenance / Projects	UT-035	Drawings / As-Builts / Record Drawings - (Water or Wastewater Facilities)	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes (after QC)	Department Preference; 18 CFR 125.2 & 125.3; GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
UTILITIES / MAINTENANCE / UNDERGROUND UTILITY (Construction)								
Utilities / Maintenance / Underground Utilities	UT-036	Capital Improvement Projects (CIP): ADMINISTRATION File (Where Utilities is the Lead - Underground Projects) Project Administration, Certified Payrolls, Community Outreach / Notifications, Project Schedules, Progress meetings, Punch Lists, Real Estate Appraisals, RFIs & Responses, Temporary Easements, Construction Manager's Logs, Daily Inspections, Daily Logs, Stormwater compliance, etc.	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Some grant funding agencies require audits; Statute of Limitations for Errors & Omissions is 10 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; CCP §337 et. seq., GC §34090
Utilities / Maintenance / Underground Utilities	UT-037	Capital Improvement Projects (CIP): PERMANENT File / Scanned Records (Where Utilities is the Lead - Underground Projects) Specifications / RFP & Addenda, Agreement / Contract, Successful Proposal, Change Orders, Geotechnical Studies & Reports, Operations & Maintenance Manuals (O&M Manuals,) Materials Testing Reports, Grading Permits, Hazardous Materials Plans, Notice of Completion, Photos, Soil Reports, Studies, Submittals, Surveys, etc.	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; retained for disaster preparedness purposes; GC §34090
Utilities / Lead Div.	UT-038	Confined Space Entries / Hot Work Permits	2 years		Mag, Ppr			8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6) GC §34090
Utilities / Maintenance / Underground Utilities	UT-039	Drawings / As-Built / Record Drawings - (Underground Utilities)	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes (after QC)	Department Preference; 18 CFR 125.2 & 125.3; GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES (Electricity, Sewer, Solid Waste, Water, Utility Billing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Lead Div.	UT-040	Lockout/Blockout - Lockout/Tagout	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Cal/OSHA requests 3 years of documents during audits; GC §34090
Lead Dept.	UT-041	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment		Mag, Ppr			Department Preference; GC §34090 et. seq.
Utilities / Lead Div.	UT-042	Underground Service Alerts (USAs) / Dig Alerts	3 years		Mag, Ppr			Department Preference (the Regional Notification Center has the obligation to retain the notice for 3 years); GC §§4216.2(f) & 4216.3(e), 34090
Division Providing Service / Work	UT-043	Work Orders / Service Requests / Asset Management / Service Orders - CRM / CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
Division Providing Service / Work	UT-044	Work Orders / Service Requests / Asset Management / Service Orders - All Information Entered in CRM / CMMS Database (Paper drafts)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §34090
Division Providing Service / Work	UT-045	Work Orders / Service Requests / Asset Management / Service Orders - NOT entered in CRM / CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Preference; CCP §§338 et seq., 340 et seq., 342, GC §34090
UTILITIES / MAINTENANCE / UNDERGROUND UTILITY (Sewer)								
Utilities / Maintenance / Underground Utility / Sewer	UT-046	CCTV Videos of Sewer Lines	Minimum 4 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City is on a 4 year cycle; GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Lead Div.	UT-047	Confined Space Entries / Hot Work Permits	2 years		Mag, Ppr			8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6) GC §34090
Utilities / Lead Div.	UT-048	Lockout/Blockout - Lockout/Tagout	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Cal/OSHA requests 3 years of documents during audits; GC §34090
Lead Dept.	UT-049	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment	Yes	Mag, Ppr			Department Preference; GC §34090 et. seq.
Utilities / Maintenance / Underground Utility / Sewer	UT-050	Sanitary Spills and Overflows (SSOs)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Required for a minimum of 5 years; SWRCB Order 2002-0103-DWQ & 2006-03; 40 CFR 122.41(j)(2); GC §34090
Utilities / Lead Div.	UT-051	Underground Service Alerts (USAs) / Dig Alerts	3 years		Mag, Ppr			Department Preference (the Regional Notification Center has the obligation to retain the notice for 3 years); GC §§4216.2(f) & 4216.3(e), 34090
Division Providing Service / Work	UT-053	Work Orders / Service Requests / Asset Management / Service Orders - CRM / CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
Division Providing Service / Work	UT-054	Work Orders / Service Requests / Asset Management / Service Orders - All Information Entered in CRM / CMMS Database (Paper drafts)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §34090
Division Providing Service / Work	UT-055	Work Orders / Service Requests / Asset Management / Service Orders - NOT entered in CRM / CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Preference; CCP §§338 et seq., 340 et seq., 342, GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
UTILITIES / MAINTENANCE / UNDERGROUND UTILITY (Water)								
Utilities / Lead Div.	UT-056	Confined Space Entries / Hot Work Permits	2 years		Mag, Ppr			8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6) GC §34090
Utilities / Lead Div.	UT-057	Lockout/Blockout - Lockout/Tagout	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Cal/OSHA requests 3 years of documents during audits; GC §34090
Lead Dept.	UT-058	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment		Mag, Ppr			Department Preference; GC §34090 et. seq.
Utilities / Lead Div.	UT-059	Underground Service Alerts (USAs) / Dig Alerts	3 years		Mag, Ppr			Department Preference (the Regional Notification Center has the obligation to retain the notice for 3 years); GC §§4216.2(f) & 4216.3(e), 34090
Division Providing Service / Work	UT-061	Work Orders / Service Requests / Asset Management / Service Orders - CRM / CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
Division Providing Service / Work	UT-062	Work Orders / Service Requests / Asset Management / Service Orders - All Information Entered in CRM / CMMS Database (Paper drafts)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §34090
Division Providing Service / Work	UT-063	Work Orders / Service Requests / Asset Management / Service Orders - NOT entered in CRM / CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Preference; CCP §§338 et seq., 340 et seq., 342, GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES (Electricity, Sewer, Solid Waste, Water, Utility Billing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
UTILITIES / OPERATIONS / REGULATORY COMPLIANCE								
Utilities / Operations / Regulatory Compliance	UT-065	Consumer Confidence Report - Annual Water Quality Report (Potable Water)	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; State law requires 12 years, federal 10 years; 22 CCR §§ 64400.25; 64470, 64483(g), 40 CFR 141.33(a); 40 CFR 141.91 40 CFR 141.33(a); GC §34090
Utilities / Operations / Regulatory Compliance	UT-066	Customer Concerns / Customer Complaints: Odor / Taste / Visual Complaints (Correspondence regarding Potable Water)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	5 years is required in State and Federal law for any complaints; 40 CFR 122.41(j)(2) & 40 CFR 141.33(b); 22 CCR 64470(a)
Utilities / Operations / Regulatory Compliance	UT-067	Electric Utility Regulatory Agency Licenses or Permits: , CEC, CFTC, CPUC, DOE, EPA, FERC, NERC, NPDES, WECC, etc.	P		Mag, Mfr, OD, Ppr	S / I	Yes (after QC)	Department Preference; GC §34090
Utilities / Operations / Regulatory Compliance	UT-068	Lab Reports & Chains of Custody: Groundwater, Surface Water	Minimum 10 years		Mag, OD, Ppr	S / I	Yes - After QC & OD	Department Preference; 40 CFR 141.405(b); GC §34090
Utilities / Operations / Regulatory Compliance	UT-069	Lab Reports & Chains of Custody: Potable Water Bacteriological and Organics	Minimum 5 years		Mag, OD, Ppr	S / I	Yes - After QC & OD	Department Preference; 40 CFR 141.33(a) and (b)(1); 22 CCR §64470
Utilities / Operations / Regulatory Compliance	UT-070	Lab Reports & Chains of Custody: Potable Water Chemical (Includes Chlorine Residuals, Disinfectant Residuals, Disinfection Byproducts, and Disinfection Byproduct Precursors)	Minimum 10 years		Mag, OD, Ppr	S / I	Yes - After QC & OD	Department preference (10 years is required); 40 CFR 141.33(a); 22 CCR §§64470, 64537 64692

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Operations / Regulatory Compliance	UT-071	Lab Reports & Chains of Custody: Potable Water Lead & Copper	Minimum 12 years OR 2 Compliance Cycles, whichever is longer		Mag, OD, Ppr	S / I	Yes - After QC & OD	Required for 12 years or 2 compliance cycles; 22 CCR 64400.25; 22 CCR §64470, 40 CFR 141.33(a); 40 CFR 141.91
Utilities / Operations / Regulatory Compliance	UT-072	Lab Reports & Chains of Custody: Wastewater, Pretreatment	Minimum 5 years		Mag, OD, Ppr	S / I	Yes - After QC & OD	Department Preference; Consistent with Bacteriological and Organics for Potable Water; GC §34090
Utilities / Operations / Regulatory Compliance	UT-073	NPDES Permits	Expiration + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; City's permit requires 5 years (Federal mandate is 3 years); 40 CFR §§122.21, 122.41, 122.44; CCP §337 et seq.
Utilities / Operations / Regulatory Compliance	UT-074	NPDES Reports	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; City's permit requires 5 years (Federal mandate is 3 years); 40 CFR §§122.21, 122.41, 122.44
Utilities / Operations / Regulatory Compliance	UT-075	Operating Permits - Water, Wastewater	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Utilities / Operations / Regulatory Compliance	UT-076	Safety Data Sheet (SDS) / Material Safety Data Sheet (MSDS) / Chemical Use Report Form (or records of the chemical / substance / agent, where & when it was used)	30 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Previous SDS / MSDS may be obtained from a service; SDS / MSDS may be destroyed as long as a record of the chemical / substance / agent, where & when it was used is maintained for 30 years; Applies to qualified employers; Claims can be made for 30 years for toxic substance exposures; 8 CCR 3204(d)(1)(B)(2 and 3), 29 CFR 1910.1020(d)(1)(i), GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Operations / Regulatory Compliance	UT-078	Vulnerability Assessment / Emergency Response Plan / Risk & Resilience Assessment / Hazard Mitigation Plan	When Superseded - Minimum 2 years		Mag, Ppr			Confidential; 42 USC 300i-2(d); GC §34090
UTILITIES / OPERATIONS / SCADA								
Utilities / SCADA	UT-079	SCADA Database (Electricity, Water, Wastewater)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
UTILITIES / OPERATIONS / WATER OPERATIONS								
Utilities / Operations / Water Operations	UT-080	Capital Improvement Projects (CIP): ADMINISTRATION File - (Where Utilities is the Lead - Water Projects) Project Administration, Certified Payrolls, Community Outreach / Notifications, Project Schedules, Progress meetings, Punch Lists, Real Estate Appraisals, RFIs & Responses, Temporary Easements, Construction Manager's Logs, Daily Inspections, Daily Logs, etc.	Completion + 10 years or After Funding Agency Audit, if required, whichever is longer	Yes: Until Completed	Mag, Ppr			Department preference; Some grant funding agencies require audits; Statute of Limitations for Errors & Omissions is 10 years; Statute of Limitations: Contracts & Spec's=4 years, Wrongful Death=comp. + 5 years, Developers=comp. + 10 years; CCP §337 et. seq., GC §34090
Utilities / Operations / Water Operations	UT-081	Capital Improvement Projects (CIP): PERMANENT File / Scanned Records - (Where Utilities is the Lead - Water Projects) Specifications / RFP & Addenda, Agreement / Contract, Successful Proposal, Change Orders, Geotechnical Studies & Reports, Operations & Maintenance Manuals (O&M Manuals,) Materials Testing Reports, Hazardous Materials Plans, Notice of Completion, Photos, Soil Reports, Studies, Submittals, Surveys, etc.	P	Yes: Until Completed	Mag, Mfr, OD, Ppr	S/I	Yes (after QC)	Department preference; retained for disaster preparedness purposes; CCP §337 et. seq., GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Lead Div.	UT-082	Confined Space Entries / Hot Work Permits	2 years		Mag, Ppr			8 CCR 5157(d)(14) & (e)(6); 29 CFR 1910.146(e)(6) GC §34090
Utilities / Operations / Water Operations	UT-083	Drawings / As-Built / Record Drawings - (Water Projects)	P	Yes	Mag, Mfr, OD, Ppr	S / I	Yes (after QC)	Department Preference; 18 CFR 125.2 & 125.3; GC §34090
Utilities / Operations / Water Operations	UT-084	FOG (Fats, Oil & Grease) Inspections / Pretreatment Annual & Quarterly Reports	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; Monitoring records required for 3 years; 40 CFR §§122.21, 122.41; 40 CFR 403.12
Utilities / Lead Div.	UT-085	Generator Operation Logs & Inspections	5 years		Mag, Ppr			AQMD Rule 1470; Form 400–E–13a instructions; GC §34090
Utilities / Lead Div.	UT-086	Lockout/Blockout - Lockout/Tagout	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Cal/OSHA requests 3 years of documents during audits; GC §34090
Lead Dept.	UT-087	Operations & Maintenance Manuals (O&M Manuals)	Life of Facility or Equipment	Yes	Mag, Ppr			Department Preference; GC §34090 et. seq.
Lead Dept.	UT-088	Pressure Vessel Certifications or Permits (Air Compressors, Propane, etc.)	Expiration of Certificate or Permit		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	GC §34090 et. seq.
Utilities / Operations / Water Operations, Operations	UT-089	Public Notices - Potable Water (Tier 1, 2, or 3)	3 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference (5 years is required); GC §34090, 22 CCR §64470
Utilities / Operations / Water Operations, Operations	UT-090	Reservoirs: Dive Videos	10 years		Mag, Mfr, OD, Ppr	S	Yes - After QC & OD	Department preference (covers 2 mandated cycles); GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Operations / Water Operations, Operations	UT-091	Reservoirs: Flushing, Disinfection and Cleaning	3 years		Mag, Mfr, OD, Ppr	S	Yes - After QC & OD	Flushing, Disinfection, Inspection and Cleaning is required for 3 years; 22 CCR §64604(c); GC §34090
Utilities / Operations / Water Operations, Operations	UT-092	Reservoirs: Inspection Reports, Maintenance Records	P		Mag, Mfr, OD, Ppr	S	Yes - After QC & OD	Department preference; GC §34090
Utilities / Operations / Water Operations, Operations	UT-093	Sanitary Surveys of Drinking Water Systems	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	22 CCR §64470; GC §34090
Utilities / Operations / Water Reclamation	UT-094	Sewer Odor Complaints / Gas Detection Results / Investigations	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; GC §34090
Utilities / Operations / Water Reclamation	UT-095	Sewer System Management Plans (SSMP) and Audits / Sanitary Spills Overflow Prevention Plan (SSOPP) and Sanitary Sewer Overflow Response Plan	Superseded + 5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; SSMPs are required to be updated every 6 years; SSOs are required for a minimum of 5 years; 40 CFR 122.41(j)(2); SWRCB General Order 2006-03; & 2022-0103-DWQ; GC §34090
Utilities / Lead Div.	UT-096	Underground Service Alerts (USAs) / Dig Alerts	3 years		Mag, Ppr			Department Preference (the Regional Notification Center has the obligation to retain the notice for 3 years); GC §§4216.2(f) & 4216.3(e), 34090

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Operations / Water Operations, Operations	UT-097	Water Production Reads / Reports (to State DHS & DWR)	5 years		Mag, Ppr			Department Preference; Meets California Department of Health requirements (3 years); GC §34090
City Clerk	UT-098	Water Supply Agreements	Copies - When No Longer Required	Yes	Mag, Mfr, OD, Ppr	S	No	Send originals to City Clerk; GC §34090.7
Utilities / Operations / Water Operations	UT-099	Well Permits	P		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department Preference; GC §34090
Utilities / Operations / Water Operations	UT-100	Wells / Well History (including abandoned or destroyed wells)	P		Mag, Mfr, OD, Ppr	S	Yes - After QC & OD	Department preference; GC §34090
Division Providing Service / Work	UT-101	Work Orders / Service Requests / Asset Management / Service Orders - CRM / CMMS DATABASE (Computerized Maintenance Management System)	Indefinite - Minimum 5 years		Mag			Data is interrelated; GC §34090
Division Providing Service / Work	UT-102	Work Orders / Service Requests / Asset Management / Service Orders - All Information Entered in CRM / CMMS Database (Paper drafts)	When No Longer Required		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Preliminary drafts (the database is the original); GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES (Electricity, Sewer, Solid Waste, Water, Utility Billing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Division Providing Service / Work	UT-103	Work Orders / Service Requests / Asset Management / Service Orders - NOT entered in CRM / CMMS Database (or partial information entered into CMMS Database) (Division providing service retains originals; Division requesting service is considered a copy)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	City Preference; CCP §§338 et seq., 340 et seq., 342, GC §34090
UTILITIES / UTILITIES BILLING / ADMINISTRATION (see City-Wide)								
Utilities / Utility Billing / Administration	UT-103.5	Rate Study documentation (data request, financial reports, customer and consumption reports) and Rate model	After Approval of New Rate Study		Mag, Ppr			Department preference; Preliminary drafts not retained in the ordinary course of business; GC §34090
UTILITIES / UTILITIES BILLING / CUSTOMER CARE (Billing)								
Utilities / Utility Billing / Customer Care (Billing)	UT-104	Utility Billing Database (CIS) Includes EMS Subscriptions	Indefinite - Minimum 5 years	Yes	Mag			Data Fields / Records are interrelated; GC §34090
Utilities / Utility Billing / Customer Care (Billing)	UT-105	Bankruptcies - NOT pursued	When No Longer Required		Mag, Ppr			Preliminary drafts not retained in the ordinary course of business; GC §34090
Utilities / Utility Billing / Customer Care (Billing)	UT-106	Bankruptcies - Where a claim is filed	7 years		Mag, Ppr			Department Preference (negative information remains on credit ratings for 7 years); GC §34090
(Bank)	UT-107	Checks deposited to Bank (City scans them for the Bank, rather than physically taking the checks to the bank to deposit them.)	Follow Bank Instructions		Mag, Ppr			These are bank instruments, and not City records; per bank agreement.

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Utility Billing / Customer Care (Billing)	UT-108	Collection Agency Assignments / Unpaid Accounts	7 years		Mag, Ppr			Department Preference; Negative credit information remains on credit reports for 7 - 10 years; Meets auditing standards; City does not Lien property (Liens are good for 10 years from recording date, and may be extended by re-recording lien); WC 36729; GC §34090
Utilities / Utility Billing / Customer Care (Billing)	UT-109	Lifeline Program / Reduced Rates (Application only)	5 years		Mag, Ppr			Department preference to meet auditing standards; GC §34090
Utilities / Utility Billing / Customer Care (Billing)	UT-110	Meter Change Orders / On & Off Orders	When No Longer Required		Mag, Ppr			Department preference (Copies); GC §34090.7
Utilities / Utility Billing / Customer Care (Billing)	UT-111	Payment Stubs / Water Receipts / Utility Receipts (when payment is submitted)	When No Longer Required		Mag, Ppr			Preliminary Documents - payments can be made without including the stub; GC §34090 et seq.
Utilities / Utility Billing / Customer Care (Billing)	UT-112	Variance Adjustments	5 years		Mag, Ppr			Department preference to meet auditing standards; GC §34090
Utilities / Utility Billing / Customer Care (Billing)	UT-113	Water Billing: Appeals - Payment Delinquency & Impending Discontinuation	Final Decision + 2 years		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Documented or attached to Customer Record in database GC §34090; H&S §116908
Utilities / Utility Billing / Customer Care (Billing)	UT-114	Water Billing: Non-payment Notices / Notice of Payment Delinquency & Impending Discontinuation	When No Longer Required		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Documented or attached to Customer Record in database GC §34090; H&S §116908

RECORDS RETENTION SCHEDULE: UTILITIES **(Electricity, Sewer, Solid Waste, Water, Utility Billing)**

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
Utilities / Utility Billing / Customer Care (Billing)	UT-115	Water Billing: NSF Checks / Adjustments to Customer accounts	When No Longer Required		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Documented or attached to Customer Record in database GC §34090; H&S §116908
Utilities / Utility Billing / Customer Care (Billing)	UT-116	Water Billing: Payment Plans: Amortization, Alternative Payment Plans, Deferrals, etc.	Expiration or Completion of Payment Plan		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Documented or attached to Customer Record in database GC §34090; H&S §116910
Utilities / Utility Billing / Customer Care (Billing)	UT-117	Water Billing: Policy on Discontinuation of Residential Service for Nonpayment	When Superseded; Minimum 2 years		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Must post to Website; H&S §116906; GC §34090
Utilities / Utility Billing / Customer Care (Billing)	UT-118	Water Billing: Report of Annual Discontinuations of Residential Service	Minimum 2 years		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Must post to Website; H&S §116918; GC §34090
UTILITIES / UTILITIES BILLING / CUSTOMER CARE (Electric / New Development)								
Community Development / Planning	UT-116	New Development Analysis and Planning	Minimum 2 years		Mag, Ppr, Mfr, OD	S / I	Yes: After QC & OD	Planning retains Final / Official Record; GC §34090 et seq.
UTILITIES / UTILITIES BILLING / CUSTOMER CARE (Water Resources)								
Utilities / Utility Billing / Customer Care (Water Resources)	UT-117	Water Conservation Programs (Toilet Rebates, etc.)	5 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	(meets auditing standards); GC §34090

RECORDS RETENTION SCHEDULE: UTILITIES
(Electricity, Sewer, Solid Waste, Water, Utility Billing)

Office of Record (OFR)	Retention No.	Records Description	Total Retention	Vital?	Media Options	Image: I=Import M=Mfr S=Scan	Destroy Paper after Imaged & QC'd?	Comments / Reference
<i>If the record is not listed here, refer to the Retention for City-Wide Standards</i>								
<i>Retentions begin when the act is completed, and imply a full file folder (e.g. last document + 2 years), since destruction is normally performed by file folder.</i>								
<i>HOLDS: Litigation, complaints, claims, public records act requests, audits and/or investigations suspend normal retention periods (retention resumes after settlement or completion).</i>								
UTILITIES / REFUSE & RECYCLING								
Utilities / Refuse & Recycling	UT-118	Solid Waste Recycling / AB 939 Compliance / SB 1383 Compliance (Organic Waste Collection and Recycling) . CalRecycle Annual Waste Diversion Report	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference; required for 5 years; Low-Carbon Fuel Standard regulations credits can be received for 10 years, and are eligible for an extension; 14 CCR § 18995.2; H&S §39730.7; GC §34090
Utilities / Refuse & Recycling	UT-119	Solid Waste Tonnage Reports (County Landfills, El Sobrante Landfill, Waste Management, etc.)	10 years		Mag, Mfr, OD, Ppr	S / I	Yes: After QC & OD	Department preference;; GC §34090