

# **General Records Retention Schedule for Personnel Records of State Agencies Revised 2026**



**South Carolina Department of Archives and History**

**Archives and Records Management Division**

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# **General Records Retention Schedule for Personnel Records of State Agencies Revised 2026**

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## Introduction

The Archives and Records Management Division of the Department of Archives and History has prepared this general retention schedule to give state government agencies the authorization to retain and dispose of common personnel records. The schedule lists the permanently valuable records, which should be properly protected, and transferred to the Department of Archives and History and provides a timetable that will allow agencies to regularly dispose of records of non-permanent value. In preparing the schedule, the Division consulted with representatives from various state agencies. This general schedule supersedes all general and specific schedules approved previously for the same records series.

## Statutory authority

Section 30-1-90(B) of the Code of Laws of South Carolina, 1976, as amended, within the [South Carolina Public Records Act](#), authorizes the Department of Archives and History to issue general schedules for records series common to agencies and subdivisions. Agencies and subdivisions must be allowed to opt out of these general schedules and proceed pursuant to the provisions of subsection (A) in the establishment of specific records schedules.

## Definitions

A records retention schedule describes one or several records series, shows the length of time the records should be retained, and indicates their final disposition. Schedules are of two types—specific and general.

- **Specific Records Retention Schedules** — These schedules are prepared and approved by the Department of Archives and History specifically for records that are unique to your agency; your agency's name will appear on these. To review or create specific schedules, contact the Records Management Division at 803-896-6128 or [rm@scdah.sc.gov](mailto:rm@scdah.sc.gov).
- **General Records Retention Schedules** — These schedules are issued by the Department of Archives and History and may be used as needed by any state agency. The titles and descriptions of record series listed in the general schedule may not exactly reflect the titles and descriptions you use. When a general schedule applies to records already covered under a specific schedule, the general schedule will supersede the specific schedule unless you wish to opt out of using the general schedule. Agencies may also create additional specific schedules to use instead of the general schedules if the existing general schedule description or retention does not meet their records needs or to avoid conflict with other laws and regulations.

## General schedule format

Each record retention schedule listed in the general schedule is presented in the following format:

- Part A — Record series number and series title: The first line includes the individual retention schedule number and the title most commonly used by agencies for each record series. A record series is a group of related records that share a common purpose, subject, or function.
- Part B — Description: A short statement describing the use and informational content of the record series. In many cases, the description also specifies the office that creates the series.
- Part C — Retention: Indicates the minimum length of time that records should be retained by the agency before their final disposition can take place.

## Application of general schedule

- This schedule may be used by any department of the state; any state board, commission, agency, and authority; any public or governmental body of the state; any organization, corporation, or agency supported in whole or in part by public funds or expending public funds, including committees, subcommittees, advisory committees, and any quasi-governmental body of the state. Whenever the term “agency” is used in this publication it refers to all of the above.
- This schedule cannot be used by:
  - any higher education institutions and their affiliations (associations, foundations, trusts, clubs, etc.). The Department of Archives and History issues separate general schedules for these institutions.
  - any political subdivision of the state, including counties, municipalities, townships, school districts, special purpose districts, and any quasi-governmental subdivisions. The Department of Archives and History issues separate general schedules for local government records.
- Before using this general schedule, you should contact your agency records officer, who should coordinate all activities relating to the retention and disposition of agency records and function as a liaison with the Department of Archives and History in administering the agency’s records management program.

## How to use the general schedule

1. Study the general schedule and compare it with your specific schedules, if you have any, to determine which schedules you will use. If you wish to use your specific schedules instead of the general schedule, follow the established procedure for those specific schedules.
2. Locate and examine all your records.
3. Match each records series with the title and description on the general schedule. The general schedule titles may not reflect exactly the titles you use; however, the record content should be the same as the general schedule description.
4. Follow the records disposition process outlined below, which should be carried out periodically - at least once a year – using the forms located at <https://scdah.sc.gov/records-management/forms>.
  - a. Non-permanent records: Complete a Report on [Records Destroyed Form \(ARM-11\)](#) and submit to the Records Management Division at [rm@scdah.sc.gov](mailto:rm@scdah.sc.gov).
  - b. Paper permanent (archival) records: Complete a [Records Transmittal Form \(ARM-14\)](#) and contact the State Records Center at 803-898-9980 or [src@scdah.sc.gov](mailto:src@scdah.sc.gov).
  - c. Electronic permanent (archival) records: Complete an [Electronic Records Transmittal Form \(ARM-15\)](#) and contact the Records Management Division at 803-896-6128 or [rm@scdah.sc.gov](mailto:rm@scdah.sc.gov).

## Explanation of terms used in retention statements

- “Until no longer needed for reference” — Records are to be kept until you decide they have no further reference value.
- “State Archives: Selection of needed documentation. Permanent.” — Records are to be transferred to the Department of Archives and History for permanent retention. Archives staff may choose to retain all or some of the transferred records.
- “State Archives: Permanent.” — Records are to be transferred to the Department of Archives and History for permanent retention. All records will become part of the archival collection.
- “‘X’ years, destroy.” — Records may be destroyed x number of years after creation, provided any administrative, legal, and fiscal retention requirements have been met.
- “Record Version” — Records created by one entity and forwarded to another entity for administrative purposes will have different retention requirements based on the use of those records. The record version refers to the retention of the records by the entity that owns or possesses the records as established by an agency-specific retention schedule,

and in some cases, the record version will be retained permanently by the Department of Archives and History.

### Special provisions

- Opting out — You may opt out of using general schedules and continue to use already approved specific schedules that cover the same records as the general schedules. You may also opt out of using general schedules if you wish to establish new specific schedules instead for the same records. Submit a [General Schedule Opt-Out Form \(ARM-18\)](#) to the Records Management Division at [rm@scdah.sc.gov](mailto:rm@scdah.sc.gov).
- Use of the State Records Center — The general schedules do not provide for records storage at the State Records Center. To transfer non-permanent records to the State Records Center for temporary storage under a specific schedule, contact the State Records Center at 803-898-9980 or [src@scdah.sc.gov](mailto:src@scdah.sc.gov).
- Confidential and restricted records — Records officers and records custodians should ensure that confidential records are securely filed, accessed, and disposed of to prevent unauthorized access. If you transfer a restricted record to the Department of Archives and History for permanent retention, you must state clearly that it is restricted, give the reason for the restriction, and how long the restriction applies.
- Exceptions to minimum retention periods — This general schedule establishes minimum retention periods for the official copy of your agency's records. Although most records can be destroyed when their minimum retentions have been met, you may need to keep some records longer to satisfy specific requirements, such as federal or state audits, legal purposes, litigation, fiscal purposes, and any other related retention hold. Be sure those requirements have been met before you dispose of those records.
- Copies — This general schedule does not cover copies of records, which you may have made for convenience, information, or duplication. If you have duplicate copies of records in any format, you must deem one version as the official version to be covered by the retention schedule. You should destroy all other copies when they are no longer referenced or used. The destruction of copies does not need to be reported on the [Report on Records Destroyed Form \(ARM-11\)](#).
- Non-Records — This general schedule covers the official version of records, and certain materials do not need to be retained as records under the disposition requirements of this schedule. Such materials include: (1) catalogs, trade journals, and other publications received that do not require official action and do not document department activities; (2) stocks of blank stationery, blank forms, or other surplus materials that are not subject to audit and have become obsolete; (3) transitory records, depending on the context, which are temporary records created for short-term internal purposes that may include, but are not limited to: a) routing slips, voicemail, and phone messages; b) miscellaneous notices

or memoranda; c) information received as part of a distribution list or e-mail message received from listservs and other Internet sources, solely for reference; d) preliminary drafts of letters, memoranda, or reports, and other informal materials that do not record decisions; e) documents that are superseded or updated (may not include official records, newsletters, etc.); f) unsolicited advertising materials; g) information in a form used for casual communication of a transitory nature; h) general correspondence pertaining to scheduling an event with no long-term value. These kinds of materials may be disposed of when no longer needed for reference and without documentation of destruction.

- **Format** — This general schedule covers records based on their informational content rather than the medium in which they are stored. Born-digital records refer to materials that are created in an electronic format, such as a Word or Excel document. Digitized records are those created in paper format that are converted into a digital format and stored electronically, such as a PDF document. To convert paper records to digital format, you must complete and submit an [Authorization for Disposal of Original Paper Records Stored as Digital Images \(Form ARM-13\)](#) to the Records Management Division at [rm@scdah.sc.gov](mailto:rm@scdah.sc.gov). This form will designate the electronic copy as the official version of the record. Electronic records with long-term (10 years or more) or permanent retention, must have a secure off-site back-up. Microfilm may be substituted for the original records if the microfilm meets the state standards in regulations as outlined in Chapter 12, Article 200 of the Code of Laws of South Carolina, 1976, as amended. To convert paper records to microfilm, you must complete and submit a [Microfilm Quality Certification for Records Disposition \(Form ARM-12\)](#). Permanent microfilmed records must have a duplicate security copy stored in a separate location. These forms are located at <https://scdah.sc.gov/records-management/forms>.
- **Social media and email programs** — These are platforms used to convey information. The information produced or shared within the platforms by a public body is considered a record. The retention of the records contained on these platforms is based on the informational content and may be covered under several retention schedules. There is no single retention period for email. The retention of email is based on the informational content and the organizational position of the author. Social Media is addressed in the State Administrative General Retention Schedule as well as under the Administrative subarticle for state colleges and universities, school districts, and local governments.
- **Ownership of official records** — This general schedule covers records created, owned, and in the possession of state agencies. Records stored in non-agency-administered databases may not be the official version of the record covered by the general schedule. Records uploaded and stored in the South Carolina Enterprise Information System (SCEIS) are considered the official copy of a record by the Records Management Division. However, while SCEIS is the holder of the record, the agency is the owner of the record. Any duplicate copies of the records not stored within SCEIS may be

destroyed when they are no longer referenced or used. SCEIS will contact the owners of the records (agencies) when records have met their full retention periods for permission to destroy the records housed in the SCEIS database. Records stored in other databases not managed by the state, such as federal databases where state and/or local entities input data, are not considered the official version of the record. Agencies should also store these records in an agency-managed server or database where the accessibility, retention, and destruction of the official version is managed by the agency.

### **Contacting the Records Management Division**

For any questions regarding the use of these general schedules or to arrange a records management training session, please contact the Records Management Division at 803-896-6128 or [rm@scdah.sc.gov](mailto:rm@scdah.sc.gov).

### **ST-PE-01. Affirmative Action Plans and Progress Reports**

**A. Description:** Affirmative Action Plans prepared by state agencies and Progress Reports used by the State Human Affairs Commission to monitor the implementation of these plans.

Affirmative Action Plans reflect an agency's projected policies, procedures, and practices to achieve the goal of a non-discriminatory employment system. Also included are statistics; analysis of the current and projected work force composition by race and sex; and comments.

The semi-annual Progress Reports consist of updated employment data analysis by race and sex; a summary of personnel actions which reflect a breakdown of agency positions by race and sex; and analysis and comments. Also included is correspondence concerning the Affirmative Action Plans and their implementation. Portions of this series are scheduled to be retained permanently by the Department of Archives and History through the State Human Affairs Commission.

**B. Retention:** 3 years; destroy.

### **ST-PE-02. Affordable Care Act Reports**

**A. Description:** Documents that employer-provided health insurance coverage was made available to employees. Information includes the determination of eligibility, an Active Notice of Election showing the offer of coverage, or a refusal of coverage. Measurement Period Reports for employees determined ineligible for coverage performed annually based on the employee's hire date.

**B. Retention:** 3 years; destroy.

### **ST-PE-03. Continuing Education Files**

**A. Description:** Documents supporting materials for continuing education licensing. Information includes course name, instructor name, course outlines and materials, course assessments, attendee name, credit hours earned, certificate of attendance, and related information.

**B. Retention:** 3 years after completion of training; destroy.

### **ST-PE-04. Employee Background Checks**

**A. Description:** Created as part of the employment process and based on records obtained from third party providers to determine if candidate is suitable for employment. Information includes applicant's name, address, date of birth, Social Security number, any alias used, criminal history, employment history, driving records, and any related records.

**B. Retention:**

- (1) Records of individuals hired: 5 years after end of employment; destroy.
- (2) Records of individuals not hired: 2 years, after the record was made or personnel action was taken, whichever is later; destroy.

### **ST-PE-05. Employee Medical Records**

**A. Description:** Records used to document the results of employee medical tests and to determine physical ability to perform job duties. Information includes name of employee, Social Security number, test results of random alcohol and drug tests, and other routine medical records, such as results of physicals and/or other related medical program records, including physician's notes, laboratory reports, physical exam reports, and polygraph reports. May contain employee exposure records for hepatitis, tuberculosis, and bloodborne pathogens. May also include medical monitoring for respiratory protection and respirator fit test performed.

**B. Retention:**

- (1) Record of exposures to hazardous materials/bloodborne pathogens, hepatitis and tuberculosis: 30 years after end of employment; destroy.
- (2) All other medical records: 5 years; destroy.

### **ST-PE-06. Employee and Volunteer Training Records**

**A. Description:** Records used to verify training completed by employees and volunteers, not including training required by the Occupational Safety and Health Administration (OSHA). Records include class title, date, time, and location; class outlines and materials needed for class, if any; instructor name; names of employees/attendees; test results; course evaluations; number of approved continuing education hours or other certificate earned, if applicable; completion status; and any other related information.

**B. Retention:**

- (1) Certification records: Until re-certification or until no longer needed for reference; destroy.
- (2) All other records: 3 years after completion of training; destroy.

### **ST-PE-07. Employment Applications (Not Hired)**

**A. Description:** Completed employment applications and personal resumes of applicants who were not hired by agency. Information includes applicant's name, address, Social Security number, position applied for, educational background, work experience, and other related information.

**B. Retention:** 2 years from the date of rejection or making of the record; destroy.

### **ST-PE-08. Employment Data Analysis by Sex and Race**

**A. Description:** A statistical breakdown of information concerning state employees by type, number, salary, and percentages of minority personnel. Information includes type of employees such as officials/administrators, professionals, technicians, office/clerical, service, maintenance, racial classifications, total work force, and work force summary.

**B. Retention:** 2 years from the date of the personnel action involved or the making of the record; destroy.

**ST-PE-09. Employer Status Reports (Unemployment Compensation)**

**A. Description:** Reports from an individual agency to the Department of Employment and Workforce which are used by the Department of Employment and Workforce to determine the liability or non-liability of the agency for payment of unemployment compensation. Records include the Employer Status Report, Notice of Liability sent to the agency from the Department of Employment and Workforce, Notice of Contribution for the next calendar year, and related memoranda and correspondence concerning changes in agency unemployment compensation accounts and liability. The record version of this series is retained in the Department of Employment and Workforce, as scheduled.

**B. Retention:** 6 years; destroy.

**ST-PE-10. Equal Employment Opportunity Report**

**A. Description:** Documents the job classification and compensation of all agency personnel. Information includes class code, slot, name, Social Security number, employee number, pay rate, state/federal funding, race, and sex.

**B. Retention:** 2 years from the date of the personnel action involved or the making of the record; destroy.

**ST-PE-11. Equal Employment Opportunity Reporting and Personnel Research Forms**

**A. Description:** Forms completed by applicants for state employment as part of their employment application. Information includes statistics on job applicants which are reported annually to the State Human Affairs Commission. The form, which is detached from the employment application, lists the applicant's name, date, Social Security number, date of birth, position applied for, race, sex, and marital status.

**B. Retention:** 2 years from the date of the personnel action involved or the making of the record; destroy.

#### **ST-PE-12. Family Medical Leave Act (FMLA) Files**

**A. Description:** Records created per Family Medical Leave Act (FMLA) guidelines and in accordance with the Fair Labor Standards Act (FLSA) to track and coordinate leave associated with federal requirements. Information includes basic payroll and identifying employee data, including name, address, and occupation; rate or basis of pay and terms of compensation; daily and weekly hours worked per pay period; additions to or deductions from wages; total compensation paid; dates or hours of the leave if in increments of less than one full day; copies of employee notices of leave furnished to the employer under FMLA, if in writing, and copies of all written notices given to employees as required under FMLA and these regulations; any documents describing employee benefits or employer policies and practices regarding the taking of paid and unpaid leaves; premium payments of employee benefits; records of any dispute between the employer and an eligible employee regarding designation of leave as FMLA leave, including any written statement from the employer or employee of the reasons for the designation and for the disagreement; and any other related leave records.

**B. Retention:** 3 years; destroy.

#### **ST-PE-13. Grievance Files**

**A. Description:** Materials relating to the reviewing, hearing, and disposing of employee-initiated grievances and appeals of adverse personnel actions and disciplinary measures. Records include initial grievance filing, letters of appeal, investigations, decisions rendered at each level of the grievance procedure, hearing transcripts or summaries, related correspondence, grievance and appeal procedures for the agency and all state employees, and the final decision rendered by the State Employee's Grievance Committee. Portions of this series are retained by the Department of Administration's Division of State Human Resources, as scheduled.

**B. Retention:** 5 years after settlement of issue; destroy.

#### **ST-PE-14. I-9 Form Employment Eligibility Verification**

**A. Description:** Used to verify legal employment eligibility, per federal law, for the purpose of hiring new employees and to re-verify employment eligibility status. Records contain completed and signed I-9 forms and supporting documentation, including, but not limited to, copies of driver's licenses, Social Security cards, and/or passports.

**B. Retention:** 3 years from date of hire or 1 year from date of termination, whichever is later; destroy.

#### **ST-PE-15. Job Announcements (Vacancies)**

**A. Description:** Announcements concerning job openings in state government. Information includes title of position, salary or grade range (merit system classification), description of job duties, closing date, and to whom applications should be directed.

**B. Retention:** 2 years after position is filled or announcement is superseded or updated; destroy.

#### **ST-PE-16. Job Classifications**

**A. Description:** A listing of all job positions classified by the Division of State Human Resources. Information includes position qualifications, pay grades, and duties for positions in State Service. The record version of this series is retained by the Department of Administration's Division of State Human Resources, as scheduled.

**B. Retention:** Until termination of position; destroy.

#### **ST-PE-17. Job Interview Files**

**A. Description:** Records documenting interviews with candidates applying for available positions who were not hired. Materials include notes taken during job interviews. May also include applications, resumes, recommendations, and related correspondence.

**B. Retention:** 2 years; destroy.

#### **ST-PE-18. Leave Records**

**A. Description:** Record of leave balances for each employee. Information includes employee name, Social Security number, type of leave accrued and used, service date, and leave balances.

**B. Retention:** 3 years; destroy.

#### **ST-PE-19. Leave Requests**

**A. Description:** Records documenting an employee's request to use accumulated leave. Information includes employee name, type of leave, and amount of time off requested.

**B. Retention:** 3 years; destroy.

#### **ST-PE-20. Log and Summary of Occupational Injuries and Illnesses**

**A. Description:** Record of work-related injuries, illnesses, and deaths. Information includes case or file number, date of injury or onset of illness, employee's name, occupation, department, description of injury or illness, fatalities, non-fatal injuries, injuries with lost workdays, injuries without lost workdays, and other related information.

**B. Retention:** 5 years following the end of the calendar year to which they relate; destroy.

#### **ST-PE-21. Personnel Administrative File**

**A. Description:** File concerns administration of personnel policy. Records include correspondence, reports, memoranda, and other records regarding personnel procedures.

**B. Retention:** Until superseded, updated, or no longer needed for reference; destroy.

**ST-PE-22. Personnel Files (Active & Inactive)**

**A. Description:** Forms and materials relating to current and former employees. Records include position description, employment applications, resumes, letters of recommendation, performance evaluations, salary information, insurance information, leave records, workers' compensation reports, resignation and termination records, and any related employment history.

**B. Retention:** 5 years after end of employment; destroy.

**ST-PE-23. Personnel Policies and Procedures**

**A. Description:** Policies and procedures issued by the agency or the Department of Administration's Division of State Human Resources. Information includes employment application policy, classification and compensation plan, explanation of performance appraisal system, reduction in force procedures, grievance policies, equal employment opportunity guidelines, termination procedure, workers' compensation plan, and other procedures issued by an agency and/or the Division of State Human Resources. Portions of this series are scheduled to be retained permanently by the Department of Archives and History through the Department of Administration's Division of State Human Resources.

**B. Retention:**

- (1) Agency: Until no longer needed for reference.
- (2) State Archives: Selection of needed documentation. Permanent.

**ST-PE-24. Safety and Hazardous Materials Records Training and Certification**

**A. Description:** Records documenting compliance with mandatory training and safety operations required or recommended by the Occupational Safety and Health Administration (OSHA). Documents the training taken by agency employees for various types of safety courses as well as employee training and certification for handling hazardous materials. May include training for bloodborne pathogens, confined space entry, fork truck certification, general workplace safety, lock/tagout, fire extinguisher, hazardous material safety, first aid, cardiopulmonary resuscitation (CPR), Oxygen and Automated External Defibrillator (AED), and other related safety training. Information includes employee name and signature, date of training, type of training, and name and signature of instructor.

**B. Retention:**

- (1) Training records: 3 years, or 1 year after end of employment, whichever is sooner; destroy.
- (2) Exposure records: 30 years after end of employment; destroy.

**ST-PE-25. Statewide Personnel Information and Reporting System Files**

**A. Description:** Used to monitor employment, salary adjustment, performance reviews, terminations, and other personnel activity. Reports include: Alphabetical Listing of Employees Sequenced by Agency-Employee Name; Employee Roster Sequenced by Grade, Class Code, and Name; Temporary Employment Roster; Gross Salary Change Report; Termination Analysis; Performance Review Summary Report; Report on Salary Change Code-Merit Increase; Reviews Report-Classified Positions-Review Sequence; Vacancies Report-All Positions; and other related records.

**B. Retention:** Until superseded or updated; destroy.

**ST-PE-26. Temporary Employee Files**

**A. Description:** Records and documentation relating to employment of temporary employees. Records include Notice of Temporary Employment, withholding tax forms, job applications, and any other related records.

**B. Retention:** 2 years after end of employment; destroy.

**ST-PE-27. Time and Attendance Records**

**A. Description:** Records concerning time worked by employees during a pay period. Information includes employee's name, section or organization unit, employee number, pay period, total time worked, and supervisor approval.

**B. Retention:** 3 years; destroy.

**ST-PE-28. Vacancies File**

**A. Description:** Documents position vacancies in agency. Information includes agency name, grade, classification title, salary range, hours worked per week, and pay rate of position.

**B. Retention:** Until superseded or updated; destroy.

**ST-PE-29. Volunteer Files**

**A. Description:** Used to maintain demographic and emergency information on volunteers. Records include applications; volunteer dates; description of volunteer services; volunteer name, address, telephone number, Social Security number, and date of birth; emergency contact name and phone number; release of liability; and any related information.

**B. Retention:** 3 years after rejection or termination of volunteer service; destroy.

**ST-PE-30. Workers' Compensation Records and Claim Documentation**

**A. Description:** Records and reports generated as the result of employment-related illnesses and injuries that may be used to document claims for the purpose of requesting payment and/or reimbursement for expenses incurred or payment for lost wages. Records include, but not limited to, employee name, salary information, incident/accident reports, Employer's First Report of Injury, physician's report and itemized statement, conditional waiver of hearing, status reports, medical bills, compensation receipts, correspondence related to the case, claims forms, final determination, and any other related documentation.

**B. Retention:** 2 years after case settlement and until no longer needed for reference; destroy.