

Kenai Peninsula Borough

Clerk's Office

*Gaye J. Vaughan, CMC/AAE, Borough Clerk
Shirley Olsen, Deputy Clerk*

TO: Drew Scalzi, Assembly President
Kenai Peninsula Borough Assembly

FROM: Gaye J. Vaughan, Borough Clerk

DATE: January 3, 1995

SUBJECT: Resolution 95-002, Authorization of Update Retention Schedules

In accordance with Resolution 93-133 and KPB Chapter 2.52.04, the Mayor approved regulations and procedures which allows the Clerk, per approval of the Borough attorney, to make revisions throughout the course of the year to the Borough's Retention Schedules.

Enclosed are the various department's requesting revisions to be made for the year of 1994. The Records Management Division of the Borough Clerk's Office has made these revisions and at this time are making the Assembly aware of these changes.

***Kenai Peninsula Borough
Records Retention Schedule
Revision Regulations***

KPB Chapter 2.52
Records Management System

A. Scope. The following regulations are adopted under the authority of KPB 2.52.040 to set out the administrative requirements and procedures pertaining to the revision of the "Kenai Peninsula Borough Records Retention Schedule," approved by the Kenai Peninsula Borough Assembly through Resolution 93-133.

1. Revision Request Form. A revision request form will be prepared by the Borough Clerk's Office which will include:

- a. the record series number to be revised or added;
- b. the number of years the record is to be retained in the user's department and in the records center;
- c. the media the record is kept on (i.e. paper, audio, video, etc.);
- d. the status of the record (open or closed file);
- e. the name of the record system;
- f. the name of the record series;
- g. a description of the record;
- h. the name, department and division of the person requesting the change;
- i. a space for the signature of the applicable department head and the borough attorney indicating either approval or denial of the request;
- j. a space for Records Management staff to indicate the date the record series was revised.

2. Revision Request Requirements. The revision request must be completed and processed in the following manner:

- a. the person making the request obtains a revision request form from Records Management and is responsible for completing the form and obtaining the signature of the applicable department head;
- b. the revision request form is returned to the Clerk's Office;
- c. the Clerk's Office is responsible for obtaining the borough attorney's signature and approval/denial.


3. Retention Schedule Revision. The retention schedule is revised in the following manner:

- a. upon approval by the borough attorney and under the direction of the Deputy Clerk, Records Management staff make the requested revision to the retention schedule program software;

- b. Records Management staff will record on the revision request form the date the software was revised;
- c. the Deputy Clerk, acting as the Records Manager, will maintain a file of all revision requests and the action taken.

4. Resolution to Revise. A Resolution Revising the Borough Records Retention Schedule shall be prepared annually by the Mayor at the request of the Borough Clerk for consideration by the Assembly. The resolution shall include all revisions made to the Records Retention Schedule within the year indicated.

Approved by the Mayor of the Kenai Peninsula Borough this 10th day of February, 1994.



Don Gilman, Borough Mayor

KPB Records Retention Schedule Revision Request

Is request for a new record series? Yes No (If you answered no, please attach a copy of the existing records series you wish to revise.)

RECORD SERIES NO: PLN04

YRS RETAINED: OFFICE 5 CENTER 99 TOTAL MEDIA STATUS 0

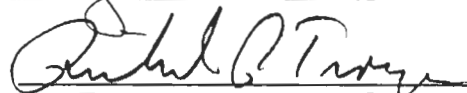
RECORD SYSTEM:

RECORD SERIES:

DESCRIPTION: Population/Census Data

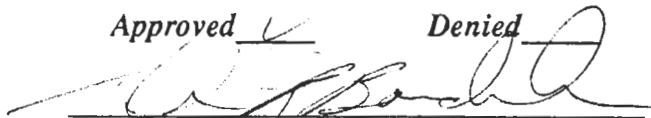
Requested By: Maria Sweppy Date: 11/23/94

Department: Planning Division:


Department Head Signature

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied


Borough Attorney

Dept Div Record Series No Date Revised
Comments

TABLE OF CLASSIFICATIONS/RECORD SERIES NUMBERS

RESOURCE PLANNING/LAND MANAGEMENT

CL NO	RS NO	1979 RECORDS DESCRIPTION
PLN 15-5	PLN02	SOLDOTNA
PLN 15-8	PLN02	HOPE
DEV 5-4	PLN02	GOALS/GENERAL PROGRAM
DEV 6	PLN03	STATISTICS/BACKGROUND
DEV 6-1	PLN04	POPULATION/CENSUS
DEV 8	PLN02	DEVELOPMENT
DEV 8-1	PLN16	COMPREHENSIVE DEV PLANS
DEV 8-2	PLN07	OIL
DEV 8-4	PLN07	COAL
DEV 8-13	PLN02	DEV - HOUSING
DEV 9-4	PLN10	RIVERS/FLOOD PLAINS
DEV 9-5	PLN12	MARINE/COASTAL ZONE/OUTER CONTINENTAL SHELF
DEV 9-6	PLN07	WATER RESOURCES
LND 2	PLN01	LEGISLATION/REGULATIONS
LND 3	PLN02	REPORTS/STUDIES
LND 5	PLN19	BOROUGH DEEDS
LND 5-1	PLN19	LAND GIFTS
LND 5-2	PLN19	LAND PURCHASE
LND 5-4	PLN19	LAND TAX FORECLOSED
LND 6	PLN19	LAND SELECTIONS MUNICIPAL
LND 7	PLN19	LAND SALES/DISPOSAL MUNICIPAL
LND 7-1	PLN19	LAND LISTS/MAPS
LND 8	PLN19	LAND SELECTIONS
LND 8-1	PLN19	LAND SELECTIONS FEDERAL

KPB Records Retention Schedule Revision Request

Is request for a new record series? ___Yes xxNo (If you answered no, please attach a copy of the existing records series you wish to revise.)

RECORD SERIES NO: DEL11

YRS RETAINED: OFFICE 1 CENTER 99 TOTAL 99 MEDIA P STATUS 0

RECORD SYSTEM: Cash Mgmt-Delinquent Accounts

RECORD SERIES: Change Land Sales Admin to: REAL PROPERTY FORECLOSURE JUDGMENT

DESCRIPTION: Real Property Judgment and master foreclosure records

Note:

~~Land sale info will be transferred from land management-DEL11 already has real property into in it as used by records mgmt old files.~~

Requested By: Linda Barclay Date: 6/28/94

Department: Finance Division: Cash Mgmt-Delinquent Accounts


Department Head Signature

FOR RECORDS MANAGEMENT USE ONLY

Approved  Denied _____

Borough Attorney

Dept _____ Div _____ Record Series No _____ Date Revised _____
Comments _____

KPB Records Retention Schedule Revision Request

Is request for a new record series? ___ Yes X No (If you answered no, please attach a copy of the existing records series you wish to revise.)

RECORD SERIES NO: PAY01

YRS RETAINED: OFFICE 1 CENTER 1 TOTAL 2 MEDIA P STATUS 0


RECORD SYSTEM: ACCOUNTING DIVISION ADMIN - PAYROLL

RECORD SERIES: PAYROLL CHECK COPIES & STUBS

DESCRIPTION: COPIES OF PAYROLL CHECKS PAID TO BOROUGH EMPLOYEES & STUB
SHOWING GROSS, DEDUCTIONS AND NET PAID.

Requested By: BEVERLY ROGERS Date: 3/25/94

Department: FINANCE Division: PAYROLL



Department Head Signature
DIVISION

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied



Borough Attorney

Dept _____ Div _____ Record Series No _____ Date Revised _____
Comments _____

AD to RM 11/17/94

KPB Records Retention Schedule Revision Request

Is request for a new record series? ___Yes No (If you answered no, please attach a copy of the existing records series you wish to revise.)

RECORD SERIES NO: ACC10

YRS RETAINED: OFFICE 01 CENTER 02 TOTAL 03 MEDIA P STATUS 0

RECORD SYSTEM: ACCOUNTING DIVISION ADMIN

RECORD SERIES: BANK STATEMENTS & BANK DEPOSIT SLIPS/ADJUSTMENTS

DESCRIPTION: MONTHLY RECONCILED BANK STATEMENTS

BANK DEPOSIT SLIPS/ADJUSTMENTS

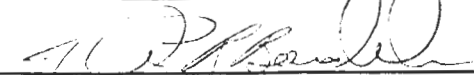
Requested By: ROBIN ADAMS Date: 3/25/94

Department: ACCOUNTING Division: FINANCE

Department Head Signature 

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied


Borough Attorney

Dept _____ Div _____ Record Series No _____ Date Revised _____
Comments _____

KPB Records Retention Schedule Revision Request

Is request for a new record series? Yes No (If you answered no, please attach a copy of the existing records series you wish to revise.)

RECORD SERIES NO: DEL07

YRS RETAINED: OFFICE 0 CENTER 6 TOTAL 6 MEDIA P STATUS 0

RECORD SYSTEM: Cash Mgmt-Delinquent Accounts

RECORD SERIES: Personal Property/Sales Tax judgments

DESCRIPTION: Personal Property and Sales tax files containing information obtaining and collecting judgment and satisfaction.

Requested By: Linda Barclay Date: 3/22/94

Department: Finance Division: Cash Mgmt-Delinquent Accour


Department Head Signature

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied


Borough Attorney

Dept Div Record Series No Date Revised
Comments

KPB Records Retention Schedule Revision Request

RECORD SERIES NO: ASG 3E

YRS RETAINED: OFFICE 20 CENTER 10 TOTAL 10 MEDIA 2 STATUS

RECORD SYSTEM:

RECORD SERIES:

DESCRIPTION: 2 USURERS PERSONAL IDENTITY
statements-inactive

Requested By: Kay Jowle Date: 2/25/94

Department: OSG Division:

Wayne Hansen
Department Head Signature

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied

W. P. Hansen
Borough Attorney

Dept Div Record Series No Date Revised
Comments

KPB Records Retention Schedule Revision Request

RECORD SERIES NO: ASG 34

YRS RETAINED: OFFICE 02 CENTER 04 TOTAL 06 MEDIA P STATUS

RECORD SYSTEM:

RECORD SERIES:

DESCRIPTION: BOE - corrected assignment 7/27/95,
appeal log, appeal folders,
appeal packet

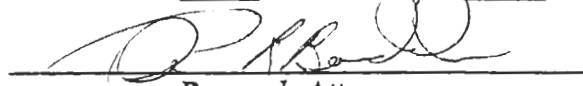
Requested By: Kau Jewle Date: 2/25/94

Department: ASG Division:


Department Head Signature

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied


Borough Attorney

Dept Div Record Series No Date Revised
Comments

KPB Records Retention Schedule Revision Request

Is request for a new record series? Yes No (If you answered no, please attach a copy of the existing records series you wish to revise.)

RECORD SERIES NO: EMR 16

YRS RETAINED: OFFICE 1 CENTER 2 TOTAL 3 MEDIA STATUS 0

RECORD SYSTEM: OEM Admin

RECORD SERIES: Local Emergency Planning Committee

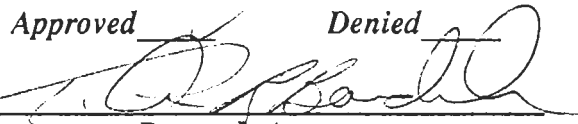
DESCRIPTION: Papers only
Taped recordings of meetings

Requested By: Vicki Ganz Date: 10/17/94

Department: OEM Division:


Department Head Signature

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied

Borough Attorney

Dept Div Record Series No Date Revised 10-19-94
Comments

New →

ASG34 - ADM

KPB Records Retention Schedule Revision Request

Is request for a new record series? Yes No (If you answered no, please attach a copy of the existing records series you wish to revise.)

RECORD SERIES NO:

YRS RETAINED: OFFICE 01 CENTER 99 ^{05/94} TOTAL 99 ^{05/94} MEDIA P STATUS C

RECORD SYSTEM: ASSESSING DEPT ADMIN

RECORD SERIES: INACTIVE BUSINESS PERSONAL PROPERTY

DESCRIPTION: RECORDS LISTING FIXED ASSETS OWNED
BY COMMERCIAL ENTERPRISES

Requested By: Wendy A. Post Date: 9-26-94

Department: Assessing Division: Admin

[Signature]
Department Head Signature

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied

[Signature]
Borough Attorney

Dept ASC Div ADM Record Series No ASG34 Date Revised _____
Comments _____

KPB Records Retention Schedule Revision Request

Is request for a new record series? Yes No (If you answered no, please attach a copy of the existing records series you wish to revise.

RECORD SERIES NO: PAY23

YRS RETAINED: OFFICE 1 CENTER 6 TOTAL 7 MEDIA P STATUS

RECORD SYSTEM: ACCOUNTING DIVISION ADMIN - PAYROLL

RECORD SERIES: GREAT-WEST MONTHLY REPORTS

DESCRIPTION: Monthly Administrative Statement, Monthly Depository
Transfer, Issued Check Listing, Basic Summary of Expenses
Report, Individual Claims Listing

Requested By: Beverly Rogers Date: 3-23-94

Department: Finance Division: Payroll

Catherine Wallace
Department Head Signature
DIVISION Administrations

FOR RECORDS MANAGEMENT USE ONLY

Approved Denied

[Signature]
Borough Attorney

Dept FIN Div PAY Record Series No PAY23 Date Revised 3-24-94

Comments Suggest reviewing usage after several years. This period
generally will exceed any statute of limitations period for claims
for payment. TRB