

Worth Public Library District Record Retention Guidelines

Item No.	Record Type	Retention Period
1	Application for disposal of local records and disposal certificates	Permanent
2	Accident, illness, and injury reports	7 years
3	Administrative correspondence including email not related to another record series	1 year (if no longer possessing any further administrative, fiscal, legal, and/or historical value)
4	Annexation, dedications, easements, right of ways, land acquisition records	Permanent
5	Annual reports	Permanent
6	Appointment books, calendars, visitor/guest registers, phone messages	2 years
7	Appraisals	3 years after superseded
8	Assessed valuation records	7 years
9	Work assignments and schedules	2 years
10	Audio and video records (reciprocal borrowing, loan requests, material confirmations, etc.)	1 year
11	Audits	Permanent (1 copy)
12	Bid records	10 years after completion of work (successful); 3 years after rejection (unsuccessful)
13	Bond records	Permanent (transcripts, resolutions, and certifications); 10 years (sale/purchase agreements); 7 years after cancellation, due date, or redemption (payment coupons)
14	Book orders	1 year
15	Budgets	7 years (final budgets); 2 years (budget worksheets & supporting documents)
16	Building, grounds, and facility maintenance files	2 years
17	Building, grounds, and facility use records	2 years
18	Cancelled checks, back statements, reconciliations, and deposit slips	7 years (originals); 2 years (copies)

19	Cash receipts & reports	2 years
20	Census records	5 years (regular); Permanent (special)
21	Certificate of status of exempt property	2 years
22	Check stubs & copies	2 years
23	Circulation statistics & records	7 years (annual); 3 years (monthly)
24	Community surveys & compliments/suggestions/feedback	1 year
25	COBRA records	5 years following termination of employment
26	Construction records	Permanent (plans, drawings, and specifications); 10 years (all other records)
27	Consultant studies & surveys, strategic plans	10 years (studies & surveys); Permanent (strategic plans)
28	Contracts, agreements, & leases	10 years after completion or termination
29	County tax collections & assessor statements	7 years
30	Departmental statistics & reports	7 years
31	Donation & endowment records	7 years
32	Election records	1 year
33	Emergency & disaster plans	Until superseded
34	Employment applications	2 years (solicited); 1 year (unsolicited)
35	Elevator & fire alarm inspection records	5 years
36	Equipment & vehicle files (maintenance, titles, registrations)	While equipment & vehicles are owned
37	Expense, mileage, & travel reports	7 years
38	Exhibit hold harmless agreements & waivers	5 years following expiration of agreement
39	Financial reports & statements (general, payroll, accounts payable & receivable, receipts, & disbursements)	7 years (annual); 2 years (daily, weekly, monthly)
40	Fine records	2 years after settlement
41	Fire department inspections	5 years
42	FOIA requests & denials	2 years
43	Grant records	3 years after final expenditure report
44	IMRF records	Until superseded or 10 years after retirement if 78+ [active employees] or 78th birthday [terminated employees] (Beneficiary form only); 7 years (all other records)

45	Insurance policies & claims	7 years following expiration or settlement (standard); 20 years following expiration (policies that cover personal injury to minors); 60 years following expiration (policies that cover sexual misconduct)
46	Inventories	2 years after superseded
47	Investment records	7 years following maturity (CD's, securities, treasury notes); 7 years (all other records)
48	Job descriptions & postings	Permanent (one copy of descriptions); 5 years after position is filled (postings)
49	Legal/litigation files	3 years after closure of case; Permanent (legal opinions)
50	Legal & meeting notices, publication certificates, press releases	1 year
51	Library card/patron registration records	1 year
52	Maps, plats, surveys, and blueprints	Permanent
53	Material safety data sheets	10 years after product no longer used or stored in workplace
54	Minutes, agendas & board packets	Permanent (one copy of originals & any original materials in packets); 1 year (copies)
55	Newsletters, brochures, pamphlets, library publications	Permanent (one copy)
56	Official's oaths, bonds, listings, & appointments	2 years after expiration of term
57	Ordinances & resolutions	Permanent (ordinances); 60 days if included in the minutes (resolutions)
58	Paid bills, invoices, & vouchers	7 years (originals); 2 years (copies)
59	Payroll records	7 years (annual reports); 2 years (daily, weekly, monthly reports); 60 years or 10 years after termination if 78+ [active employees] or 78th birthday [terminated employees] (individual earning records); 5 years after date of death (deceased employees); 5 years following termination of employment (payroll deduction records)

60	Personnel records	60 years or 10 years after termination if 78+ [active employees] or 78th birthday [terminated employees] (work & salary history); 5 years after date of death or termination (all other records)
61	Petty cash	7 years; 2 years (receipts)
62	Policies, procedures, rules, regulations, & bylaws	Permanent (one copy)
63	Postage records	2 years
64	Program files	3 years
65	Public performance/motion picture licenses	1 year after expiration
66	Reconsideration of materials requests	1 year after process is complete
67	Referenda materials	1 year
68	Salary schedule & surveys	7 years
69	Shelf list records	Until superseded
70	State & federal tax reports (W2's, W3's, W4's, IL 941's, 1099's)	Until superseded or 5 years after termination (W4's); 7 years (all other forms)
71	State of IL unclaimed property reports	7 years
72	Tax anticipation warrants	7 years
73	Tax exemption records	Until superseded
74	Tax levy records	7 years
75	Time records (sick, vac, overtime, comp, leave, clock in & out)	2 years if info is still available in employee's work history
76	Treasurer's reports	7 years (annual); 2 years (daily, weekly, monthly)
77	Unemployment compensation records	7 years
78	I-9's	3 years after date of hire or 1 year after termination, whichever is later
79	Withdrawn book records	6 months
80	Worker's compensation records	7 years following settlement