

City of Henderson Records Retention Schedule

Finance Department

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Disposition Information:

- Unscheduled records can NOT be destroyed. A local governmental entity shall not dispose of any public record except in accordance with a schedule for the retention of such records approved by the State Library and Archives Administrator pursuant to - NAC 239.155 Disposal of public record restricted; procedures for proposal and adoption of schedules for retention of public records.
- Unless otherwise specified, a Certificate of Destruction is required to be completed prior to destroying any records regardless of media. See City of Henderson ROP-004 Destruction of Public Records for more information.
- In the event there is any pending litigation, suspend any destruction of records including deletion, overwriting, or any other destruction of alteration of electronic and/or hardcopy information relevant to the dispute until the case is closed and the City Attorney's Office has given approval to proceed.
- Unless otherwise specified, permanent records should be transferred to the City Archives as soon as possible.

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- Convenience copies and duplicates must NOT be retained longer than the Record Copy.
- To protect the confidentiality of records of local governments that are declared by law to be confidential, such records must be destroyed in accordance with the applicable schedule by shredding in a manner that ensures the information cannot be reconstructed, by burning if allowed by federal, state and local regulations, or as required by the laws, regulations, established standards, policies and procedures of the State or Federal Government. An electronic record must be destroyed in accordance with the applicable schedule in a manner that ensures the information cannot be retrieved or reconstructed, including, without limitation, overwriting, degaussing, and the physical destruction of the storage media – NAC 239.165 (1) (2) Destruction of confidential records, electronic records and copies of records. Also see, City of Henderson Records Directive No. 9 Confidentiality of Personal Information/Social Security Numbers.

Definitions:

Business Essential (BE) Record - A record or record series that are critical to continuing or reestablishing operations during an emergency or after a disaster, or that are necessary to protect rights and interests.

Convenience Copy – A copy of a record or series that consists of reference, informational, or copies of other records and are usually kept to be made available for distribution to individuals, departments, boards, commissions, committees, remote locations, etc.

LRDA – Local Government Records Disposition Authority control number assigned to a record series by the Nevada State Library and Archives. The Local Government Records Retention Schedules can be found here: http://nsla.nv.gov/Records/Local/Local_Main/

Record - Information that is created or received pursuant to a law or ordinance, or in connection with the transaction of the official business of any office or department of a local governmental entity, including, without limitation, all documents, papers, letters, unpublished books, maps, charts, blueprints, drawings, photographs, films, computer printouts, newspapers received pursuant to NRS 247.070, artifacts entered as exhibits in any proceeding in any court, information stored on a magnetic tape, computer, laser disc or optical disc, or on material which is capable of being read by a machine, including microforms and audio and visual materials, and any other evidence, including all copies thereof. NAC 239.101 “Record of a local government” defined.

Approved by Records Committee: 09/24/2019

Approved by State Archives: 02/04/2020

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General		
Record Series/ Description	Filing Method	Retention/Disposition
Accounts Payable		Refer to City-wide Administration schedule. Exception: If related to bond proceeds, Retention/Disposition shall follow requirements for Bond Registers and Records
Accounts Receivable		Refer to City-wide Administration schedule.
Bank Reconciliations Contains bank account reconciliations; see also Bank Statements and Deposit Slips.	By Month	Until annual audit is completed. LRDA: 20071311 Bank Transaction Records Exception: If related to bond proceeds, Retention/Disposition shall follow requirements for Bond Registers and Records, as per FMP 600-03.
Bank Statements and Deposit Slips May include, but is not limited to, account statements, deposit and withdrawal slips, certificate of deposits, bank account reconciliations, transaction dates, beginning balance, check or deposit amount, document numbers, adjustments, description of transaction, ending balance, and related documents.	By date	Until annual audit is completed. LRDA: 20071311 Bank Transaction Records Exception: If related to bond proceeds, Retention/Disposition shall follow requirements for Bond Registers and Records, as per FMP 600-03.
Bond Registers and Records Typically includes a listing of bonds issued and redeemed and may contain, but is not limited to, information on coupon number, amount of bond, date bond issued, date of bond redemption, purpose of bonds, records related to the investment and expenditure of bond proceeds, and to whom bonds were issued.	By issue date	Ten (10) fiscal years after the fiscal year in which the bond matures. LRDA: 20070391 Bond Issues
Check Registers May include check registers, payroll registers, and council register which usually includes check number, date of check, amount of check, individual or vendor to whom the check was written, and the purpose of check.	By date	Six (6) fiscal years after the fiscal year to which they refer. LRDA: 20070429 Check Registers

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Record Series/ Description	Filing Method	Retention/Disposition
Checks, Cancelled Checks that have been cancelled, spoiled, voided, stale dated, and/or returned from bank.	By month	Refer to Accounts Payable record series on City-wide Administration schedule.
Daily Cash and Receipt Reports Report of daily cash transactions (received) and may also include receipts, cashier's daily reports, cash balance reports, transmittal reports, and related documents.	By date of report	Refer to Accounts Receivable, Citywide Administration Schedule. Exception: If related to bond proceeds, Retention/Disposition shall follow requirements for Bond Registers and Records, as per FMP 600-03.
General Ledger This record series consists of one or more series of financial ledgers providing a final year to date summary of accounting data and a permanent audit trail for all fiscal receipts and disbursement transactions affecting any and all local government funds and accounts, including receipts and expenditures from all revenue sources, both public and private.	By fiscal year	Permanent - Upon approval by City Council, submit to City Archives for permanent retention. LRDA: 20070442 General Ledger
Indebtedness Annual Report Typically an itemized report documenting the outstanding indebtedness of the governmental entity.	By fiscal year	Retain for a minimum period of five (5) calendar years from the submission of the report, LRDA: 20141900 Reports Required by Law/Regulation
Investment Records This record series is used to document and administer investment accounts and may contain, but is not limited to, investment fund information, records related to specific investments, investment registers, investment reconciliations, confirmations of purchase, bank statements, records which document transaction activity, investment fund balances, investment performance documentation, related correspondence and similar documents.	By fiscal year	Six (6) fiscal years from the end of the fiscal year to which the record pertains. LRDA: 20070444 Investment Records Exception: If related to bond proceeds, Retention/Disposition shall follow requirements for Bond Registers and Records, as per FMP 600-03.
Journal Entries Includes journal entries, budget entries and logs. May also include information on account number, amount debited, amount credited, account description, and reason for journal entry.	By date	Six (6) fiscal years after the fiscal year to which they refer. Maintain until end of fiscal year and one (1) additional year; then send to Records Center for storage until destruction. LRDA: 20070446 Journal Entries Exception: If related to bond proceeds, Retention/Disposition shall follow requirements for Bond Registers and Records, as per FMP 600-03.

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Record Series/ Description	Filing Method	Retention/Disposition
Payroll Files for Employees May contain, but is not limited to, employee time records, cost summary reports, detail cost listings, copy of pay register, direct deposit reports, pay worksheets, net pay adjustments, quarterly reports, and similar reports and documents.	By pay period	Three (3) fiscal years from the fiscal year to which the records pertain. LRDA: 20070449 Payroll Files
Procurement Card (PCard) Records This record series is used to document and administer the authorization and use of procurement cards. May contain, but is not limited to, authorizations, applications, agreements, procurement card logs, and other documents used to create procurement card accounts. This series may also contain, but is not limited to, accounting records related to purchases and payment of procurement/credit card bills, related correspondence and similar documents.	By cardholder name	Retain records used to create procurement/credit card accounts for a minimum period of six (6) fiscal years after the fiscal year the last record of purchase is made. Retain accounting records related to procurement/credit cards until completion of an annual audit.* LRDA: 20071310 Procurement and Credit Card Records *State minimum recommended retention is three (3) years after the discontinuation or cancellation of account.
Subsidiary Ledgers or Registers Documents the details of financial transactions such as those related to receipts and expenditures on a daily, monthly, quarterly or similar basis. This record series may contain, but is not limited to, expenditure ledgers, encumbrance listings, warrant registers, cumulative voucher sheets, and related documents and reports. This record series may also be used to provide backup documentation to the General Ledger.	Maintained in PeopleSoft system	Six (6) fiscal years from end of the fiscal year to which the records pertain. LRDA: 20071312 Subsidiary Ledgers or Registers

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General		
Record Series/ Description	Filing Method	Retention/Disposition
Tax Exempt Bond Files This record series documents the transaction and expenditure of Tax Exempt Bonds (TEB). Records may include but are not limited to basic records relating to the tax exempt transaction (such as loan agreements, bond counsel opinions, policy guidelines), records documenting the expenditure of TEB proceeds (such as construction contracts, certificates of completion, vendor invoices), records documenting the sources of payment or security of the bonds, if applicable documentation pertaining to any investment of any bond proceeds, related correspondence, and similar records.	By date	Retain for as long as the bonds are outstanding, plus six (6) fiscal years after the final redemption date of the bonds. LRDA: 20181980 Tax Exempt Bond Files
Tax Records This record series is used to report the collection, distribution, deposit, and transmittal of federal income taxes. Records may include the federal miscellaneous income statement (1099), copies of wage and tax form (W-2), request for taxpayer identification number and certificate (W-9), employers' quarterly federal tax return (941, 941E), tax deposit coupon (8109), and similar completed forms.	By date	Four (4) years after the tax year in which the taxes are due, or four (4) years after the date the tax is paid, whichever is later. LRDA: 20070450 Employment Tax Records
Unclaimed Property Report Records of unclaimed property may contain various completed forms and reports as required by the State Treasurer (Administrator of Unclaimed Property), supportive documentation, associated correspondence, and similar material.	By fiscal year and name of property owner	Seven (7) calendar years from the date the abandoned property report is filed with the State Treasurer. LRDA: 20070464 Unclaimed Property Report
Vendor Requests Forms or applications used to request use of vendors not currently listed as providing goods or services to the governmental entity. Information may include vendor name, address, phone number, type of goods or services provided, copy of W-9, contact name, assigned vendor number, and related documents.	By vendor number	Until superseded, updated, or no longer needed for reference. LRDA: 20071309 Vendor Code Requests

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General		
Record Series/ Description	Filing Method	Retention/Disposition
Vendor Master List Master list of vendors providing goods and services to the local government; may include but is not limited to, vendors name, address, phone number, fax number, e-mail address, product and service information, vendor ID, tax ID number, contact name, etc.	Maintained in PeopleSoft	Until superseded by new master list. LRDA: 20070379 Vendor Master List

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Business License		
Record Series/ Description	Filing Method	Retention/Disposition
Administrative Hearing Files Documents administrative hearings/ appeals addressing specific actions. May contain notices, citations, motions, pleading, supporting documents, decision documents, and related correspondence.	Electronic data, maintained in CRM.	Five (5) calendar years from date of decision. LRDA: 20121869 Administrative Hearing Files *State minimum recommended retention is three (3) calendar years from date of decision.
Background Investigations for Business Suspensions and Revocations Law Enforcement investigation of licensee who is potentially engaged in conduct that could lead to restriction, suspension, revocation of license.	Applicant name	Ten (10) calendar years from date of last action. LRDA: 20070840 Licenses, Business Background: Suspensions and Revocations
Business License Applications Original application, application renewals, and applications for changes to name, address, etc. Also may contain, list of requirements, copies of completed forms from licensee, license fee information, proof of payment, related correspondence, and similar documents.	Electronic data, application and related information on current business information stored in permitting system.	One (1) calendar year after the cessation of business. LRDA: 20070221 Business Licenses, Applications and Renewals.
Business License Audit Reports Documents business license financial and compliance audits performed by the business license auditor. May include but is not limited to, the business licensee's financial statements, income statements, general ledger reports, charts of accounts, sales journals, register summaries, sales invoices, z-tapes, federal income tax returns, state sales and use tax returns, copies of bank statements, correspondence, recommendations, audit findings, and related documents.	Hard copy by fiscal year and name. Electronic copy maintained on server.	Three (3) fiscal years after the fiscal year to which they pertain, or for the period required by Municipal or County code, whichever is longer. LRDA: 20141890 Business License Audit Reports
Business License Citation Log Book – (Duplicate) Business License Citation Log Book containing duplicates of violations issued to licensed business.	Hard copy by citation number.	One calendar year after the calendar year the last violation of the book is issued.
Investigations Files of routine investigations of businesses licensed in the City of Henderson. May contain, but is not limited to, release forms, reports from the State of Nevada Criminal History Repository, reports from FBI records, authorizations, related correspondence and similar documents.	Active investigations filed by business name. Inactive investigations filed by fiscal year investigation closed and business name.	Three (3) calendar years from the end of the calendar year to which they pertain. LRDA: 20070224 Investigations

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Business License		
Record Series/ Description	Filing Method	Retention/Disposition
Temporary Licenses or Permits Documents licenses or permits for temporary events such as special event liquor sales, firewood sales, pumpkin sales, Christmas tree sales, concerts, outdoor festivals, carnivals, arts and crafts shows and similar temporary events.	Electronic data, application and related information on current business information stored in permitting system.	Three (3) calendar years from the expiration of the license or permit. LRDA: 20070231 Temporary Licenses or Permits

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Improvement Districts		
Record Series/ Description	Filing Method	Retention/Disposition
Acquisition Reports (Duplicates) Duplicates created and maintained to support business processes including Pay Requests.	By LID Number Copy of record is maintained with City Council Agenda	Destroy when no longer needed to support business processes. No Certificate of Destruction is needed.
Affidavits of Publication (Duplicates) Duplicates created and maintained to support business processes. (Copy of record filed with City Clerk, NRS 271.190)	Maintain with related foreclosure file (e.g. LID 924) as part of that series, or as a parallel series by date	Destroy when no longer needed to support business processes. If maintained with related file, destroy with file. If maintained as separate series, destroy when no longer needed to support business processes. No Certificate of Destruction is needed.
Apportionment Report and Final Assessment Roll (Duplicates) Duplicates created and maintained to support business processes. (The copy of record is maintained with the City Council Agenda.)	By LID Number	Destroy when no longer needed to support business processes. No Certificate of Destruction is needed.
Final Engineers Report (Duplicates) Duplicates created and maintained to support business processes. (Copy of record maintained by City Clerk's office.)	By LID	Destroy when no longer needed to support business processes. No Certificate of Destruction is needed.
LID Billing Records Records of LID billings, includes list of people billed.	Maintained by Assessment Management Group (AMG)	Refer to Accounts Receivable, Citywide Administration Schedule.
LID Foreclosure Information Consists of documentation of LID foreclosure proceedings, Certificates of Redemption and Certificates of Sale.	By LID and date	Permanent. LRDA: 20141892 LID Foreclosure Files
LID Trustee Investment Statements LID Investment account statements.	By LID	Ten (10) years after bond retired. LRDA: 20070391 Bond Issues
Monthly Reconciliations Reconciliation between General Ledger and LID subsidiary. Report received from Assessment Management Group (AMG).	By LID and date	Until completion of annual audit. LRDA: 20071311 Bank Transaction Records

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Payroll		
Record Series/Description	Filing Method	Retention/Disposition
Direct Deposit Authorizations This record series documents authorizations to deposit employee payroll earnings into employee bank accounts through direct deposit. This series may include, but is not limited to, employee name, name of financial institution, authorization form, related correspondence, and similar documents.	By reporting year	Three (3) years after employee termination, cancellation, or change of authorization. LRDA: 20071259 Direct Deposit Authorizations
Garnishment Authorizations This record series consists of documentation of requests and court orders served on the local government to withhold the wages of employees for garnishments, tax levies, support payments, and other reasons. May contain, but is not limited to, writ of garnishment, notarized interrogatories, copies of writ of execution with attachments, answer of garnishee, affidavits, copies of accounting documents, notes, correspondence, and related documents.	By reporting year	Six (6) fiscal years from the end of the fiscal year to which the records pertain. LRDA: 20071247 Garnishments
Payroll Administrative Reports Contains reports, statistical studies, and other records designed and used for budget preparation, projections, workload and personnel management, research, and general reference. It may consist of, but is not limited to, summary reports organizing wages, deductions, and other data into categories such as quarter-to-date, year-to-date, fiscal year-to-date, break downs by area of expense, employee/employer contributions, and similar administrative reports.	By payroll period	Three (3) fiscal years from the fiscal year to which the reports relate. LRDA: 20070452 Payroll Administrative Reports
Payroll – W2 Forms .	Maintained electronically (Note: some paper forms may exist, filed by reporting year)	See “Tax Records,” page 6
Payroll – W4 Forms	By reporting year	Retain authorization forms for a period of three (3) fiscal years after the form is cancelled or superseded, or after the termination of the employee. Retain file maintenance documents for two (2) fiscal years from the date of the document. LRDA: 20071686 Payroll Deduction Input Documents

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Payroll		
Record Series/Description	Filing Method	Retention/Disposition
Payroll Reports This record series documents pay and benefits earned by government employees. This series may contain, but is not limited to, information such as employee name and payroll number, social security number, hours worked, rate, overtime, various allowances, gross pay, federal and other withholdings, voluntary deductions, garnishments, net pay, retirement deductions, leave earned and taken, payroll codes, check number and agency code, warrants issued, warrant register, and related data.	By payroll period	Retain year-end registers/reports for a minimum period of sixty (60) years from the year to which the record pertains. Retain other payroll registers for a minimum period of six (6) fiscal years from the fiscal year to which the records pertain. LRDA: 20070451 Payroll Registers or Reports
Retirement Reports	By month	Sixty (60) years from the year to which the record pertains. Close file at end of fiscal year. LRDA: 20070451 Payroll Registers or Reports

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Nevada Public Improvement Trust		
Record Series/ Description	Filing Method	Retention/Disposition
Agendas Public Improvement Trust meeting agenda.	By meeting date	Permanent - Transfer to City Archives with original Minutes. LRDA: 20071639 Agendas – Official/Final
Bank Statements Monthly bank statements.	Chronologically	Until resolution of annual audit. LRDA: 20071311 Bank Transaction Records
Certificates of Posting Certificates/affidavits of agenda posting.	By meeting date	Five (5) calendar years from the date of the meeting - Transfer to City Clerk's Office with other Agenda-related materials. LRDA: 20071717 Open Meeting Law: Legal Notices
Minutes Public Improvement Trust meeting minutes.	By meeting date	Permanent -Transfer to City Archives with Agenda, Posting and original back-up after approval by the Public Improvement Trust. LRDA: 20070107 Minutes of all Boards, Commissions, Committees, and Councils
Project Applications Formal project applications for bonding submitted to the Public Improvement Trust.	By project name	Permanent - One (1) year after resolution of annual audit after completion of project, purge non-record material from file then transfer to City Archives.
Project Statements Copy of individual project bond issue statements from Trustee Bank to Trust.	Monthly	One (1) calendar year from completion of audit.
Resolutions Resolutions adopted by the Public Improvement Trust.	Numerically	Permanent - Transfer to City Archives. LRDA: 20071676 Ordinances and Resolutions
Trust Audits Annual Trust Audit.	By fiscal year	Permanent – Transfer to City Archives when no longer needed for business purposes. LRDA: 20071527 Gift and Donation Records (Financial Records)
Trust Policies Policies officially adopted by the Public Improvement Trust.	Chronologically	Permanent - Transfer to City Archives.

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Nevada Public Improvement Trust		
Record Series/ Description	Filing Method	Retention/Disposition
Warrant Register Register of income and expenditures presented at each Trust meeting.	By meeting date	Permanent - Transfer to City Archives with original minutes of the meeting where the Warrant Register was approved. LRDA: 20071527 Gift and Donation Records (Financial Records)

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Purchasing		
Record Series/Description	Filing Method	Retention/Disposition
Bids (Solicitations) Includes Request for Proposal (RFP) and invitations to bid. File may consist of copies of responses to bids, specifications, legal notices, bid opening minutes, correspondence, copies of POs, copies of agenda items, and other related items.	By date, number	Refer to Citywide Administration Schedule.
Sale of Surplus Materials and Equipment This record series documents the sale of surplus goods and equipment. This series may include, but is not limited to, advertisements, posting notices, inventory of sale items, price list, billing records, receipts or transmittals for funds received, title information, title transfers, correspondence and related documents.	By department, by date	Three (3) fiscal years from the fiscal year of the sale. LRDA: 20070377 Sale of Surplus Goods to the Public, Records of

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Risk Management		
Record Series/Description	Filing Method	Retention/Disposition
ADA Compliance Records Contains ADA plan, procedures, and correspondence.	By fiscal year	Three (3) calendar years from the end of the calendar year to which they pertain. LRDA: 20071422 Americans with Disabilities Act (ADA) Compliance Records
Claims Against a City Documents various types of insurance claims filed against a local government. Claims include personal injury, property damage, motor vehicle accident, and others. Series may include, but is not limited to insurance claim forms, copy of hospital, physician, ambulance and medication bills, death and birth certificates, reports, photographs, summaries, reviews, notices, audio and videotapes, transcriptions of recorded statements, memoranda, correspondence, and related documents used in processing the claim.	File by claim name and date	Three (3) fiscal years after resolution. LRDA: 20070268 Claims Against a City
Claims Against a City – Involving a Minor Child Documents various types of insurance claims filed against a local government which involve a minor child. Claims include personal injury, property damage, motor vehicle accident, and others. Series may include, but is not limited to insurance claim forms, copy of hospital, physician, ambulance and medication bills, death and birth certificates, reports, photographs, summaries, reviews, notices, audio and videotapes, transcriptions of recorded statements, memoranda, correspondence, and related documents used in processing the claim.	File by claim name and date	If the claim involves injuries to a minor child, the claim record should be maintained until the minor reaches the age of majority (18 years old), plus two (2) to file a claim for bodily injuries. Three (3) fiscal years after the minor child reaches majority. Legal Citations: NRS 129.010 (Age of Majority), NRS 11.190 (3)(d) (Periods of Limitation)
Claims Against Others (Subrogation) Documents claims against the public and insurance companies for the recovery of costs for damage to governmental property. May contain, but not limited to, damage reports, copies of police reports, damage estimates, cost reports, photographs, summaries, copies of insurance documents, legal documents, related correspondence, and similar records.	File by claim name and date	Six (6) fiscal years after final payment is received, or one (1) fiscal year after the claim is written off as uncollectible. LRDA: 20071547 Claims Against Others

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Risk Management		
Record Series/Description	Filing Method	Retention/Disposition
Incident Reports This record series documents related to property and bodily injury incidents that may result into a claim filed against the city. This series may include, but not limited to, activity logs, communications logs, summary reports, photographs, estimate of damages, police reports, related correspondence and similar incident-related documentation.	File by claim name and date	Four (4*) calendar years from the date of the incident. LRDA: 20071712 Risk Management: Accident Reports *State recommended retention is three calendar years
Incident Reports – Involving a Minor Child This record series documents related to property and bodily injury incidents involving a minor child that may result into a claim filed against the city. This series may include, but not limited to, activity logs, communications logs, summary reports, photographs, estimate of damages, police reports, related correspondence and similar incident-related documentation.	File by claim name and date	If the incident involves injuries to a minor child, the incident record should be maintained until the minor reaches the age of majority (18 years old), plus two (2) to file a claim for bodily injuries. Three (3) fiscal years after the minor child reaches majority. Legal Citations: NRS 129.010 (Age of Majority), NRS 11.190 (3)(d) (Periods of Limitation)
Insurance Plans Documents the terms and conditions of insurance policies between the local government and insurers. Types of insurance may include liability, property, motor vehicle, flood, and others. Records usually include policies, endorsements, rate change notices, agent of record, related correspondence, and similar documents. This series does not include Group Health and Life Insurance policies.	File by Insurance Company Name and Date	Six (6) calendar years after policy expires. LRDA: 20070062 Risk Management: Insurance Policies
Motor Vehicle Accident Reports This record series documents accidents involving departmental vehicle or equipment. Reports may contain, but are not limited to, date and time of accident, locations of accident type of accident, narrative reports regarding circumstances, parties involved, injury reports, copies of medical treatment reports, property damage reports, vehicle damage reports witness statements copies of police reports departmental forms, notes, photos, correspondence, and related documents.	By calendar year	Four (4*) calendar years following resolution of settlement of any claims or legal actions, or from the accident date if no legal action or damage results. LRDA: 20071712 Risk Management: Accident Reports *State recommended retention is three calendar years