

NASDA Enumerator Records Retention Guidelines for RFOs (updated May 18, 2017)

All records pertaining to NASDA Personnel should be kept in iSolved **(Items in red are required for NASDA Annual Audit)**

Record	Document Type	Description	Access	Retention
NAS-001 Enumerator Application	Employment Application	NAS-001 – DATE	Allow Employee Access	Until Termination + 7 years
NAS-002 Personnel Action of NASDA Employee	Personnel File	NAS-002 – DATE	Only Admin	Until Termination + 7 years
NAS-003 NASDA Notification Form	Personnel File	NAS-003 – DATE	Only Admin	Until Termination + 7 years
NAS-004 Certification of Confidentiality & Motor Vehicle Insurance	Policy Acknowledgements	NAS-004 – DATE	Only Admin	Until Termination + 7 years Please scan the most recent Confidentiality form and NASDA Handbook form on file
NAS-006 Notification of Eligibility for Promotion	Personnel File	NAS-006 – DATE	Admin Only	Until Termination + 7 years
NAS-008 NASDA Enumerator Performance Evaluation	Performance Review	NAS-008 – DATE	Allow Access for All	Until Termination + 7 years
NAS-009 Nomination for Special Award	Employee Recognition	NAS-009 – DATE	Allow Access for All	Until Termination + 7 years
NAS-010 Enumerator Selection Aid	Pre Hire DT Results	NAS-010 – DATE	Allow Access for All	Keep on file for one year, after one year purge. If the one year has already passed do not load it into iSolved please purge.
NAS-011 NASDA Time, Mileage & Expense Sheet	Payroll Documents	NAS-011 – DATE	Allow Access for All	Anyone not currently using an electronic timesheet will need to have these uploaded into iSolved, i.e. the few Native Americans or Amish or other special circumstance. Any other/old paper timesheets in the files can be purged and do not need to be scanned into iSolved.
NAS-012 Interview Monitoring Form	Pre Hire DT Results	NAS-012 – DATE	Allow Access for Supervisors/ Employee	1 year from date of personnel action Keep on file for one year, after one year purge. If the one year has already passed do not load it into iSolved please purge.
NAS-013 Supervisory Notification of Eligibility for Promotion Form	Personnel File	NAS-013 – DATE	Allow Access for All	Until Termination + 7 years
NAS-015 NASDA Supervisor Performance Evaluation	Performance Review	NAS-015 – DATE	Allow Access for All	Until Termination + 7 years
NAS-016 Employee's Report of Accident	Personnel File	NAS-016 – DATE	Allow Access for All	Until Termination + 7 years
NAS-017 Supervisor's Report of Accident	Personnel File	NAS-016 – DATE	Allow Access for All	Until Termination + 7 years
NAS-018 Coach Evaluation Form	Performance Review	NAS-018 – DATE	Allow Access for All	Until Termination + 7 years
Handbook Receipt	Policy Acknowledgments	Signed Handbook Receipt – DATE	Allow Access for All	Until Termination + 7 years Please scan the most recent Confidentiality form and NASDA Handbook form on file
Background/MVR Check	Background Check	Background/MVR Check – DATE	Only Admin	Until Termination + 7 years
I-9 Documents	Employee I-9	I-9 – DATE	Allow Access for All	Until Termination + 7 years
Disciplinary Documents	Disciplinary Doc	Disciplinary Documents	Only Admin	Until Termination + 7 years
Cell Phone Policy Agreement	Policy Acknowledgments	Cell Phone Policy Agreement-DATE	Allow Access for All	Until Termination + 7 years
Visa Reports	Employee I-9	Visa Report – DATE	Allow Access for All	Until Termination + 7 years