

# OREGON STATE ARCHIVES

## Records Retention Schedule

Edition: November 2016

### *Organizational Placement*

Schedule # 2014-0003

**Agency:** Oregon State Marine Board

**Division:** Administration

**Office:** Director

### *Program Description*

The Director's office is responsible for leading the agency and for the oversight of all agency functions and programs of the Oregon State Marine Board including statewide boating programs, fiscal management, boating registration and boating facilities.

Specific programs in the Director's office involve the coordination of Marine Board administrative participation, strategic planning, policy and planning, administrative rule development, legislative concept development, waterway planning, website/social media and personnel management.

### *Program Records*

**001 Marine Board Meeting Minutes, Reports, and Studies, [1957 – present], 10 c.f.**

Retain permanently, transfer to the State Archives after 10 years

**002 Waterway Plans Project Files, 1974 – [ongoing], 7 c.f.**

(a) Retain policy development, meeting notes and planning records 1 year after the final plan is produced, destroy

(b) Retain final plan permanently, transfer to State Archives after 10 years

**003 Tri-ennial Survey, 1971 - [ongoing], 2 c.f.**

(a) Retain responses and assessment data from two most current surveys after final survey is produced, destroy

(b) Retain final survey permanently, transfer to State Archives after retaining it in the agency for 10 years

**004 Customer Service Survey Records**

Retain 5 years, destroy

**005 Fuel Survey Records**

Retain 5 years, destroy

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### ***State Agency General Records Retention Schedule Records***

*Includes but is not limited to*

#### **Administrative Records - OAR 166-300-0015**

Administrative Rule Preparation Records  
Agency Organizational Records  
Legislative Tracking Records  
Litigation Records  
Policy and Procedure Guidelines and Manuals  
Policy Development and Planning Records  
Public Records Disclosure Request Records  
Press releases  
Publication Preparation Records  
Staff Meeting Records

#### **Information and Records Management Records - OAR 166-300-0030**

Radio System Records

#### **Payroll Records - OAR 166-300-0035**

Family Medical Leave Records  
Leave Applications

#### **Personnel Records – OAR 166-300-0040**

Affirmative Action Records  
Employee Personnel Records  
Employee Training Records  
Employment Eligibility Verification Forms (I-9)  
Layoff Records  
Position Description and Reclassification Records  
Recruitment and Selection Records

#### **Risk Management Records - OAR 166-300-0045**

Emergency Response Plans and Procedures  
Hazard Exposure Records  
Incident Reports  
Occupational Injury and Illness Records  
Safety Program Records

#### ***Databases***

None

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### *Organizational Placement*

**Agency:** Oregon State Marine Board

**Division:** Administration

**Program:** Registration

**Schedule #: 2014-0003**

### *Program Description*

The Registration program of the State Marine Board is responsible for vessel titling and registration activities through both contracted agents and the main offices of the Board. It also registers floating homes/boathouses, outfitter/guides, and ocean charter boats.

### *Program Records*

**006 Boating Report to the United States Coast Guard**

Retain 4 years, destroy

**007 Marine Board Agent Files**

Retain 6 years after separation, destroy

**008 Title and Registration Files**

Retain 25 years after title and registration no longer in effect, destroy

### *State Agency General Records Retention Schedule Records*

*Includes but is not limited to*

**Administrative Records - OAR 166-300-0015**

Calendar and Scheduling Records

Conference, Seminar, and Training Program Records

Correspondence

Mailing Lists

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Public Records Disclosure Request Records

Staff Meeting Records

### *Databases*

MARS

**OREGON STATE ARCHIVES**  
**Records Retention Schedule**

**Edition:** November 2016

***Organizational Placement***

**Schedule #: 2014-0003**

**Agency:** Oregon State Marine Board

**Division:** Administration

**Section:** Business Services

***Program Description***

The Business Services section of the Oregon State Marine Board provides fiscal operations and financial reporting responsibilities for the agency. The section is responsible for accounting, payroll, budgeting, purchasing, grant administration, amongst other fiscal functions.

***Program Records***

None

***State Agency General Records Retention Schedule Records***

*Includes but is not limited to*

**Administrative Records - OAR 166-300-0015**

Calendar and Scheduling Records

Contracts and Agreements

Key Assignment Records

Staff Meeting Records

**Facilities/Property Records – OAR 166-300-020**

Asset Inventory Reports

Building Records

**Financial Records – OAR 166-300-0025**

Accounts Payable Reports

Annual Financial Reports

Budget Allotment Reports

Budget Preparation Records

Cash Receipt Records

Expenditure and Revenue Reports

General Ledger Transaction Reports

Grant Records

Legislatively Adopted Budgets

Purchasing Records

**Payroll Records – OAR 166-300-0035**

Employee Payroll Records

Federal and State Tax Records

Employee Time Records

Oregon State Payroll Application Reports

Payroll Administrative Reports

**Risk Management Records – OAR 166-300-0045**

Insurance Fund Claim Records

***Databases***

None

OREGON STATE ARCHIVES  
**Records Retention Schedule**

Edition: November 2016

***Organizational Placement***

**Schedule #: 2014-0003**

**Agency:** Oregon State Marine Board

**Division:** Administration

**Section:** Business Services

**Program:** Information Technology

***Program Description***

The Information Technology program oversees the Oregon State Marine Board's computer technology systems. Staff provides technical operations, maintenance, support, data backup and services.

***Program Records***

None

***State Agency General Records Retention Schedule Records***

*Includes but is not limited to*

**Administrative Records - OAR 166-300-0015**

Calendar and Scheduling Records

Correspondence

**Information and Records Management Records – OAR 166-300-0030**

Computer System Maintenance Records

Computer System Program Documentation

Computer System Security Records

Computer System Wiring Records

Information System Planning and Development Records

Software Management Records

User Support Records

***Databases***

None

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### *Organizational Placement*

Schedule #: 2014-0003

**Agency:** Oregon State Marine Board

**Division:** Boating Facilities

### *Program Description*

The Boating Facilities division of the State Marine Board works for the maintenance and improvement of boating facilities statewide. This program provides technical assistance and grants to local governments and state agencies for the acquisition, development and improvement of public boating access and Clean Vessel Act Projects. Engineering, design and project administration services (including project planning), and needs assessments are part of this Division. This division also publishes literature on boating facilities.

### *Program Records*

**009 Facilities and Clean Vessel Act Program Records**

Retain 50 years, destroy

**010 Maintenance/ Emergency Assistance Program Records**

Retain 50 years, destroy

**011 Marine Facility Publications**

Retain 10 years, destroy

### *State Agency General Records Retention Schedule Records*

*Includes but is not limited to*

**Administrative Records - OAR 166-300-0015**

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Publication Preparation Records

**Facilities/Property Records – OAR 166-300-0020**

Asset Inventory Reports

Building Records

Damaged/Stolen Property Records

Equipment Maintenance Records

Equipment/Property Disposition Records

Facility Work Orders

Vehicle Records

**Financial Records – OAR 166-300-0025**

Accounts Payable Reports

Accounts Receivable Reports

Encumbrance Registers

Expenditure and Revenue Reports

Grant Records

### *Databases*

None

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### *Organizational Placement*

**Agency:** Oregon State Marine Board

**Division:** Boating Safety

**Schedule #: 2014-0003**

### *Program Description*

The Boating Safety division of the State Marine Board provides education and enforcement services to the public and marine law enforcement officers statewide. It provides on-water safety patrol and boating law enforcement through contracts with county sheriffs and the Oregon State Police. The Division is responsible for contract administration, coordination of service, law enforcement equipment, and acts as a liaison with law enforcement offices. It provides basic and advanced marine training for the certification of county marine officers statewide. The Division maintains a marine law enforcement database, and provides boats and marine equipment for water patrol.

### *Program Records*

**012 Boating Accident Reports**

Retain 20 years, destroy

**013 Boating Under the Influence/Registration Revocation Files**

(a) Retain one-year revocation files 5 years after end of revocation period, destroy

(b) Retain three-year revocation files 8 years after end of revocation period, destroy

**014 Charter Boat License Files**

Retain 6 years after license expired, destroy

**015 County Complaint Files**

Retain 15 years, destroy

**016 Law Enforcement Records**

(a) Retain citations, warnings, education reports and other enforcement records 10 years, destroy

(b) Retain records related to boat maintenance 5 years after vessel is removed from service, destroy

**017 Mandatory Education Records**

(a) Retain data files 1 year after successfully added to the registration program, destroy

(b) Retain records in the registration program for the life of the individual, destroy

**018 Outfitter/Guide Registration Files**

Retain 6 years after outfitter/guide becomes inactive, destroy

**019 School Program Education Materials**

Retain until superseded or obsolete, destroy

**020 Special Use Device Permits**

Retain 3 years, destroy

**021 Summary Report of Boating Fatalities**

(a) Retain annual summary reports 10 years, destroy

(b) Retain ten year summary reports 20 years, destroy

**022 Water Safety Education Curriculum Materials**

Retain until superseded or obsolete, destroy

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**023 Water Safety Education Equipment Records**

Retain 3 years after equipment disposed, destroy

**024 Waterway Event Permits**

Retain 3 years, destroy

**025 Waterway Markers Approved Applications and Placement Plans Records**

Retain 10 years, destroy

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*Includes but is not limited to*

**Administrative Records- OAR 166-300-0015**

Calendar and Scheduling Records

Conference, Seminar, and Training Program Records

Contracts and Agreements

Correspondence Records

LEDS Certification Records

Mailing Lists

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Publication Preparation Records

Security Records

Staff Meeting Records

**Facilities/Property Records - OAR 166-300-0020**

Asset Inventory Reports

Equipment Maintenance Records

***Databases***

None



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### *Organizational Placement*

**Schedule #: 2014-0003**

**Agency:** Oregon State Marine Board

**Division:** Administration

**Program:** Policy & Environmental

### *Program Description*

The Policy & Environmental program of the State Marine Board provides guidance and oversight to the Aquatic Invasive Species, Clean Marina and the Abandoned Boat programs are also managed by the Boating Safety program.

### *Program Records*

**026 Aquatic and Invasive Species (AIS) Program Reports**

- (a) Retain annual summary reports 10 years, destroy
- (b) Retain ten year summary reports 20 years, destroy

**027 Clean Marina Records**

- (a) Retain outreach materials until superseded or obsolete, destroy
- (b) Retain inspection records 7 years, destroy

**028 Foam Encapsulation Program**

Retain permit documentation 15 years, destroy

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*Includes but is not limited to*

**Administrative Records- OAR 166-300-0015**

Calendar and Scheduling Records

Conference, Seminar, and Training Program Records

Contracts and Agreements

Correspondence Records

Mailing Lists

Policy and Procedure Guidelines and Manuals

Policy Development and Planning Records

Publication Preparation Records

Security Records

Staff Meeting Records

### *Databases*

None