

Tempco Electric Heater Corp.
Form Control Spreadsheet - F104
Revised 2/19/25

Form #	Revision #	Controlling Department or Individual	Form Location	Branded	Form/Record Description	Use	Retention Period	Approval	Revision Date / Notes
ACCOUNTING									
F01	0	Accounting			Check request	Payment requests	7 Years	PW	
F01	1	Accounting			Request for Check	Payment requests	7 Years	PW	1/8/14
F01	2	Accounting		✓	Request Form for Check Payment	Payment requests	7 Years	PW	Branding Update: 3/26/2020
F01	3	Accounting	http://intranet.tempco.com/accounting-iso	✓	Check Request	Payment requests	7 Years	PW	Converted to excel file and update to internal document layout (1/14/21)
F05	0	Accounting			Expense report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	
F05	1	Accounting			Expense report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	2/4/16
F05	2	Accounting			Expense report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	Updated Rate: 1/10/2017
F05	3	Accounting		✓	Expense report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	Updated Rate: 1/10/2019
F05	3	Accounting		✓	Expense report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	1/10/19
F05	4	Accounting			Expense Report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	Updated Mileage Rates - 1/7/20
F05	5	Accounting			Expense Report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	Updated Mileage Rates - 1/1/22
F05	6	Accounting	http://intranet.tempco.com/accounting-iso	✓	Expense Report	Form for reporting and reimbursement of expenses relative to company business	7 Years	PW	Updated Milage Rates - 1/31/23
F06	0	Accounting			Illinois Sales Tax Exemption Certificate	Customer letter verifying tax exempt status	3Y Update, 7Y after term	PW	
F06	1	Accounting			Illinois Sales Tax Exemption Certificate	Customer letter verifying tax exempt status	3Y Update, 7Y after term	PW	6/5/15
F06	2	Accounting			Illinois [Sales Tax] Exemption Certificate	Customer letter verifying tax exempt status	3Y Update, 7Y after term	PW	
F06	3	Accounting	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/02/F06_IL_TaxExemptCert_Rdr.pdf	✓	Illinois [Sales Tax] Exemption Certificate	Customer letter verifying tax exempt status	3Y Update, 7Y after term	PW	12/11/19
F07	0	Accounting			Credit application	Self explanatory	Perm-7Y after rel. term.	PW	
F07	1	Accounting			Credit application	Self explanatory	Perm-7Y after rel. term.	PW	1/22/10
F07	2	Accounting			Confidential Credit Application	Self explanatory	Perm-7Y after rel. term.	PW	5/14/18
F07	3	Accounting			Confidential Credit Application	Self explanatory	Perm-7Y after rel. term.	PW	Branding and form updates: 3/26/2020
F07	4	Accounting	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/02/F07_CnfDntlCrdtAp_Rdr.pdf		Confidential Credit Application	Self explanatory	Perm-7Y after rel. term.	PW	Form updates: 2/25/22
F08	0	Accounting	Media Prod: ISO9001/Forms/Accounting_Forms/		Credit reference request	Self explanatory	Perm-7Y after rel. term.	PW	
F09	0	Accounting	Media Prod: ISO9001/Forms/Accounting_Forms/		Bank reference request	Self explanatory	Perm-7Y after rel. term.	PW	
F114	0	Accounting			Tempco Trade References	Self explanatory	Perm-7Y after rel. term.	PW	5/14/2018
F114	1	Accounting		✓	Tempco Trade References	Self explanatory	Perm-7Y after rel. term.	PW	6/18/19
F114	3	Accounting	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/02/F114_TempcoTradeRef_Rdr.pdf	✓	Tempco Trade References	Self explanatory	Perm-7Y after rel. term.	PW	9/23/21
F121	0	Accounting	http://intranet.tempco.com/accounting-iso	✓	Request Form for Wire Transfer / ACH Payment	Self explanatory	10y after termination	PW	New Form combining F02 and F03 - Converted to excel spreadsheet 1/14/21
F125	0	Accounting	Media Prod: ISO9001/Forms/Accounting_Forms/	✓	Debit Memo	Self explanatory	7 Years	PW	2/5/21
F126	0	Accounting	Media Prod: ISO9001/Forms/Accounting_Forms/	✓	Credit Card Payment Request	Self explanatory	7 Years	PW	3/4/21
F127	0	Accounting	Media Prod: ISO9001/Forms/Accounting_Forms/	✓	Vendor Tax Certificate	Self explanatory	7 Years	PW	3/15/21
HUMAN RESOURCES									
F10	0	Human Resources			New Employee Orientation Checklist – Temp	Self explanatory	10Y after termination	PW	
F10	1	Human Resources			New Employee Orientation Checklist – Temp	Self explanatory	10Y after termination	PW	
F10	2	Human Resources		✓	New Employee Checklist – Temporary Employees	Self explanatory	10Y after termination	PW	9/25/19
F10	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	New Employee Checklist – Temporary Employees	Self explanatory	10Y after termination	PW	3/4/21
F11	0	Human Resources			New Employee Orientation Checklist – Office	Self explanatory	10Y after termination	PW	
F11	1	Human Resources			New Employee Checklist – Office Employees	Self explanatory	10Y after termination	PW	
F11	2	Human Resources		✓	New Employee Checklist – Office Employees	Self explanatory	10Y after termination	PW	12/11/19
F11	3	Human Resources		✓	New Employee Checklist – Office Employees	Self explanatory	10Y after termination	PW	3/4/21
F11	4	Human Resources		✓	New Employee Checklist – Office Employees	Self explanatory	10Y after termination	PW	11/15/21

Tempco Electric Heater Corp.
Form Control Spreadsheet - F104
Revised 2/19/25

Form #	Revision #	Controlling Department or Individual	Form Location	Branded	Form/Record Description	Use	Retention Period	Approval	Revision Date / Notes
F11	5	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	New Employee Checklist – Office Employees	Self explanatory	10Y after termination	PW	Added line for vision insurance 02/16/22
F12	0	Human Resources			New Employee Orientation Checklist – Plant	Self explanatory	10Y after termination	PW	
F12	1	Human Resources			New Employee Checklist – Plant Employees	Self explanatory	10Y after termination	PW	
F12	2	Human Resources		✓	New Employee Checklist – Plant Employees	Self explanatory	10Y after termination	PW	12/11/19
F12	3	Human Resources		✓	New Employee Checklist – Plant Employees	Self explanatory	10Y after termination	PW	3/4/21
F12	4	Human Resources		✓	New Employee Checklist – Plant Employees	Self explanatory	10Y after termination	PW	11/15/21
F12	5	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	New Employee Checklist – Plant Employees	Self explanatory	10Y after termination	PW	Added line for vision insurance 02/16/22
F13	0	Human Resources			New Employee / Change of Status	Any change in employee data	10Y after termination	PW	
F13	1	Human Resources			New Employee / Change of Status	Any change in employee data	10Y after termination	PW	
F13	2	Human Resources		✓	New Employee / Change of Status Form	Any change in employee data	10Y after termination	PW	12/11/19
F13	3	Human Resources		✓	New Employee / Change of Status Form	Any change in employee data	10Y after termination	PW	11/13/20
F13	4	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F13_StatusChangeForm_Rdr.pdf	✓	New Employee / Change of Status Form	Any change in employee data	10Y after termination	PW	Added Vision Info 2/16/2022
F14	0	Human Resources			Address Verification Form – English	Self explanatory	10Y after termination	PW	
F14	1	Human Resources			Address Verification Form	Self explanatory	10Y after termination	PW	
F14	2	Human Resources		✓	Address Verification Form	Self explanatory	10Y after termination	PW	12/11/19
F14	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F14_AddressVerification_Rdr.pdf	✓	Address Verification Form	Self explanatory	10Y after termination	PW	3/4/21
F15	0	Human Resources			Address Verification Form – Spanish	Self explanatory	10Y after termination	PW	
F15	1	Human Resources			Verificación de Dirección	Self explanatory	10Y after termination	PW	
F15	2	Human Resources		✓	Verificación de Dirección	Self explanatory	10Y after termination	PW	12/11/19
F15	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F15_AddressVerification_SP_Rdr.pdf	✓	Verificación de Dirección	Self explanatory	10Y after termination	PW	3/4/21
F16	0	Human Resources			Direct Deposit Form	Self explanatory	10Y after termination	PW	
F16	1	Human Resources			Direct Deposit Form	Self explanatory	10Y after termination	PW	
F16	2	Human Resources			Payroll Direct Deposit Agreement	Self explanatory	10Y after termination	PW	
F16	3	Human Resources		✓	Payroll Direct Deposit Agreement	Self explanatory	10Y after termination	PW	12/11/19
F16	4	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/09/F16_Direct_Deposit_Rdr.pdf	✓	Payroll Direct Deposit Agreement	Self explanatory	10Y after termination	PW	3/4/21
F17	0	Human Resources			Employee Uniform Rental/Lease Program	Self explanatory	10Y after termination	PW	
F17	1	Human Resources			Employee Uniform Rental / Lease Program Policy	Self explanatory	10Y after termination	PW	
F17	2	Human Resources		✓	Employee Uniform Rental / Lease Program Policy	Self explanatory	10Y after termination	PW	1/22/10
F17	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F17_Uniform_Form_Rdr.pdf	✓	Employee Uniform Rental / Lease Program Policy	Self explanatory	10Y after termination	PW	3/4/21
F18	0	Human Resources			Tuition Reimbursement Form	Self explanatory	10Y after termination	PW	
F18	1	Human Resources			Tuition Reimbursement Agreement	Self explanatory	10Y after termination	PW	
F18	2	Human Resources		✓	Tuition Reimbursement Agreement	Self explanatory	10Y after termination	PW	12/11/19
F18	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F18_TuitionRmbrsmntForm_Rdr.pdf	✓	Tuition Reimbursement Agreement	Self explanatory	10Y after termination	PW	3/4/21
F19	0	Human Resources			Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	
F19	1	Human Resources			Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	1/22/10
F19	2	Human Resources			Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	1/5/11
F19	3	Human Resources			Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	1/10/12
F19	4	Human Resources			Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	6/3/13
F19	5	Human Resources			Office Employee - Flexible Spending Plan Annual Enrollment Form	Participation in section 125 plan	10Y after termination	PW	1/18/16
F19	6	Human Resources		✓	Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	5/14/20
F19	7	Human Resources		✓	Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	3/4/21
F19	8	Human Resources		✓	Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	Added vision insurance info 2/23/22
F19	9	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F19_125Form_Office_FlexSpend_Rdr.pdf	✓	Flexible Spending Plan – Office	Participation in section 125 plan	10Y after termination	PW	1/26/23
F20	0	Human Resources			Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	
F20	1	Human Resources			Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	1/22/10
F20	2	Human Resources			Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	1/5/11
F20	3	Human Resources			Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	1/10/12
F20	4	Human Resources			Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	6/3/13
F20	5	Human Resources			Plant Employees - Flexible Spending Plan Annual Enrollment Form	Participation in section 125 plan	10Y after termination	PW	1/18/16
F20	6	Human Resources		✓	Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	5/14/20
F20	7	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	3/4/21

Tempco Electric Heater Corp.
Form Control Spreadsheet - F104
Revised 2/19/25

Form #	Revision #	Controlling Department or Individual	Form Location	Branded	Form/Record Description	Use	Retention Period	Approval	Revision Date / Notes
F20	8	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	3/4/21
F20	9	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Flexible Spending Plan – Plant	Participation in section 125 plan	10Y after termination	PW	1/26/23
F21	0	Human Resources			Voluntary Resignation	Self explanatory	10Y after termination	PW	
F21	1	Human Resources			Voluntary Resignation Form	Self explanatory	10Y after termination	PW	
F21	2	Human Resources		✓	Voluntary Resignation Form	Self explanatory	10Y after termination	PW	12/11/19
F21	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Voluntary Resignation Form	Self explanatory	10Y after termination	PW	3/4/21
F22	0	Human Resources			Exit Interview – Plant	Self explanatory	10Y after termination	PW	
F22	1	Human Resources			Exit Interview – Plant	Self explanatory	10Y after termination	PW	
F22	2	Human Resources		✓	Exit Interview – Plant	Self explanatory	10Y after termination	PW	12/11/19
F22	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Exit Interview – Plant	Self explanatory	10Y after termination	PW	3/4/21
F23	0	Human Resources			Exit Interview – Office	Self explanatory	10Y after termination	PW	
F23	1	Human Resources			Exit Interview – Office	Self explanatory	10Y after termination	PW	
F23	2	Human Resources		✓	Exit Interview – Office	Self explanatory	10Y after termination	PW	12/11/19
F23	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Exit Interview – Office	Self explanatory	10Y after termination	PW	3/4/21
F24	0	Human Resources			Exit Interview Acknowledgement	Self explanatory	10Y after termination	PW	
F24	1	Human Resources			Exit Interview Acknowledgement	Self explanatory	10Y after termination	PW	
F24	2	Human Resources		✓	Exit Interview Acknowledgement	Self explanatory	10Y after termination	PW	12/11/19
F24	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Exit Interview Acknowledgement	Self explanatory	10Y after termination	PW	3/4/21
F25	0	Human Resources			Termination letter – Office	Self explanatory	10Y after termination	PW	
F25	1	Human Resources			Termination Letter	Self explanatory	10Y after termination	PW	
F25	2	Human Resources		✓	Termination Letter	Self explanatory	10Y after termination	PW	12/11/19
F25	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Termination Letter	Self explanatory	10Y after termination	PW	3/4/21
F26	0	Human Resources			Termination Checklist	Self explanatory	10Y after termination	PW	
F26	1	Human Resources			Termination Checklist	Self explanatory	10Y after termination	PW	
F26	2	Human Resources		✓	Termination Checklist	Self explanatory	10Y after termination	PW	12/11/19
F26	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Termination Checklist	Self explanatory	10Y after termination	PW	3/4/21
F27	0	Human Resources			Authorization Last Paycheck	Non ee last check pick up authorization	10Y after termination	PW	
F27	1	Human Resources			Authorization for Last Paycheck	Non ee last check pick up authorization	10Y after termination	PW	
F27	2	Human Resources		✓	Authorization for Last Paycheck	Non ee last check pick up authorization	10Y after termination	PW	12/11/19
F27	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Authorization for Last Paycheck	Non ee last check pick up authorization	10Y after termination	PW	3/4/21
F28	0	Human Resources			Company Loan – Payroll Deduction Auth	Self explanatory	10Y after termination	PW	
F28	1	Human Resources			Company Loan	Authorizes payroll deduction to repay loan	10Y after termination	PW	
F28	2	Human Resources		✓	Company Loan	Authorizes payroll deduction to repay loan	10Y after termination	PW	12/11/19
F28	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Company Loan	Authorizes payroll deduction to repay loan	10Y after termination	PW	3/4/21
F29	0	Human Resources			Employee Purchase – Payroll Deduction Auth	Self explanatory	10Y after termination	PW	
F29	1	Human Resources			Employee Purchase: Payroll Deduction Authorization	Self explanatory	10Y after termination	PW	
F29	2	Human Resources		✓	Employee Purchase: Payroll Deduction Authorization	Self explanatory	10Y after termination	PW	12/11/19
F29	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Employee Purchase: Payroll Deduction Authorization	Self explanatory	10Y after termination	PW	3/4/21
F30	0	Human Resources			Check pick up	Acknowledgement of check pick up non ee	10Y after termination	PW	
F30	1	Human Resources			Check Pick Up	Acknowledgement of check pick up non ee	10Y after termination	PW	
F30	2	Human Resources		✓	Check Pick Up	Acknowledgement of check pick up non ee	10Y after termination	PW	12/11/19
F30	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Check Pick Up	Acknowledgement of check pick up non ee	10Y after termination	PW	3/4/21
F31	0	Human Resources			Employee Disciplinary Action	Self explanatory	10Y after termination	PW	
F31	1	Human Resources			Employee Disciplinary Action	Self explanatory	10Y after termination	PW	
F31	2	Human Resources		✓	Employee Disciplinary Action	Self explanatory	10Y after termination	PW	12/11/19
F31	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F31_EmpDisciplinaryAction_Rdr.pdf	✓	Employee Disciplinary Action	Self explanatory	10Y after termination	PW	3/4/21
F32	0	Human Resources			Request for Leave of Absence	Self explanatory	10Y after termination	PW	
F32	1	Human Resources			Request for Personal Leave of Absence	Self explanatory	10Y after termination	PW	
F32	2	Human Resources		✓	Request for Personal Leave of Absence	Self explanatory	10Y after termination	PW	12/11/19
F32	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F32_LeaveOfAbsenceForm_Rdr.pdf	✓	Request for Personal Leave of Absence	Self explanatory	10Y after termination	PW	3/4/21
F33	0	Human Resources			Position Requisition Form	Approval form for to start recruitment	10Y after termination	PW	
F33	1	Human Resources			Position Requisition Form	Approval form for to start recruitment	10Y after termination	PW	
F33	2	Human Resources			Position Requisition Form	Approval form for to start recruitment	10Y after termination	PW	12/11/19
F33	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F33_PositionRequisitionForm_Rdr.pdf	✓	Position Requisition Form	Approval form for to start recruitment	10Y after termination	PW	3/4/21
F34	0	Human Resources			Check Receipt for Referral Bonus	Verification by receiving employee	10Y after termination	PW	

Tempco Electric Heater Corp.
Form Control Spreadsheet - F104
Revised 2/19/25

Form #	Revision #	Controlling Department or Individual	Form Location	Branded	Form/Record Description	Use	Retention Period	Approval	Revision Date / Notes
F34	1	Human Resources			Check Receipt for Referral Bonus	Verification by receiving employee	10Y after termination	PW	
F34	2	Human Resources		✓	Check Receipt for Referral Bonus	Verification by receiving employee	10Y after termination	PW	12/11/19
F34	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Check Receipt for Referral Bonus	Verification by receiving employee	10Y after termination	PW	3/4/21
F35	0	Human Resources			Vacation Waiver Form	Payout of unused vacation waiver	10Y after termination	PW	
F35	1	Human Resources			Vacation Waiver Form	Payout of unused vacation waiver	10Y after termination	PW	
F35	2	Human Resources		✓	Vacation Waiver Form	Payout of unused vacation waiver	10Y after termination	PW	12/11/19
F35	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Vacation Waiver Form	Payout of unused vacation waiver	10Y after termination	PW	3/4/21
F36	0	Human Resources			Job Safe Practice Orientation	Self explanatory	10Y after termination	PW	
F36	1	Human Resources			Safe Job Practices Orientation	Self explanatory	10Y after termination	PW	
F36	2	Human Resources		✓	Safe Job Practices Orientation	Self explanatory	10Y after termination	PW	12/11/19
F36	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F36_SafeJobPrctcsOrmnt_Rdr.pdf	✓	Safe Job Practices Orientation	Self explanatory	10Y after termination	PW	3/4/21
F37	0	Human Resources			Supervisor's Accident Report	Self explanatory	10Y after termination	PW	
F37	1	Human Resources			Supervisor's Accident Investigation Report	Self explanatory	10Y after termination	PW	
F37	2	Human Resources		✓	Supervisor's Accident Investigation Report	Self explanatory	10Y after termination	PW	12/11/19
F37	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F37_AccidentReport_Supervisor_Rdr.pdf	✓	Supervisor's Accident Investigation Report	Self explanatory	10Y after termination	PW	3/4/21
F38	0	Human Resources			Employee Accident Report	Self explanatory	10Y after termination	PW	
F38	1	Human Resources			Employee Accident Report	Self explanatory	10Y after termination	PW	
F38	2	Human Resources		✓	Employee Accident Report	Self explanatory	10Y after termination	PW	12/11/19
F38	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F38_AccidentReport_Employee	✓	Employee Accident Report	Self explanatory	10Y after termination	PW	3/4/21
F39	0	Human Resources			Witness Accident Report	Self explanatory	10Y after termination	PW	
F39	1	Human Resources			Witness Accident Report	Self explanatory	10Y after termination	PW	
F39	2	Human Resources		✓	Witness Accident Report	Self explanatory	10Y after termination	PW	12/11/19
F39	3	Human Resources	http://intranet.tempco.com/wp-content/uploads/2021/03/F39_AccidentReport_Witness_Rdr.pdf	✓	Witness Accident Report	Self explanatory	10Y after termination	PW	3/4/21
F40	0	Human Resources			Checklist Accident Factors	Self explanatory	10Y after termination	PW	
F40	1	Human Resources			Checklist of Accident Factors	Self explanatory	10Y after termination	PW	
F40	2	Human Resources		✓	Checklist of Accident Factors	Self explanatory	10Y after termination	PW	12/11/19
F40	3	Human Resources	http://intranet.tempco.com/wp-content/uploads/2021/03/F40_AccidentChecklist_Rdr.pdf	✓	Checklist of Accident Factors	Self explanatory	10Y after termination	PW	3/4/21
F41	0	Human Resources			Promotion checklist	Self explanatory	10Y after termination	PW	
F41	1	Human Resources			Promotion Checklist for Advancement to Group Leader	Self explanatory	10Y after termination	PW	
F41	2	Human Resources		✓	Promotion Checklist for Advancement to Group Leader	Self explanatory	10Y after termination	PW	12/11/19
F41	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Promotion Checklist for Advancement to Group Leader	Self explanatory	10Y after termination	PW	3/4/21
F42	0	Human Resources			Request for Transfer / Promote	Self explanatory	10Y after termination	PW	
F42	1	Human Resources			Request for Transfer / Promote	Self explanatory	10Y after termination	PW	
F42	2	Human Resources		✓	Request for Transfer / Promote	Self explanatory	10Y after termination	PW	12/11/19
F42	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Request for Transfer / Promote	Self explanatory	10Y after termination	PW	3/4/21
F43	0	Human Resources			90 Day Performance Review	Self explanatory	10Y after termination	PW	
F43	1	Human Resources			90-Day Employee Performance Appraisal	Self explanatory	10Y after termination	PW	
F43	2	Human Resources		✓	90-Day Employee Performance Appraisal	Self explanatory	10Y after termination	PW	12/11/19
F43	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F43_PerformanceReview90Day_Rdr.pdf	✓	90-Day Employee Performance Appraisal	Self explanatory	10Y after termination	PW	3/4/21
F44	0	Human Resources			Annual Performance Review	Self explanatory	10Y after termination	PW	
F44	1	Human Resources			Annual Performance Appraisal for Plant Employees	Self explanatory	10Y after termination	PW	12/11/19
F44	2	Human Resources		✓	Annual Performance Appraisal for Plant Employees	Self explanatory	10Y after termination	PW	2/15/10
F44	3	Human Resources	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F44_PerformanceReviewAnnual_Plant_Rdr.pdf	✓	Annual Performance Appraisal for Plant Employees	Self explanatory	10Y after termination	PW	3/4/21
F46	0	Human Resources			Personnel File – Review form	Self explanatory	10Y after termination	PW	
F46	1	Human Resources			Personnel File Review form	Self explanatory	10Y after termination	PW	
F46	2	Human Resources			Personnel File Review form	Self explanatory	10Y after termination	PW	12/11/19
F46	3	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/		Personnel File Review form	Self explanatory	10Y after termination	PW	12/11/19
F47	0	Human Resources			Verification of Single Marital Status – 401(k)	Self explanatory	10Y after termination	PW	
F47	1	Human Resources			Verification of Single Marital Status	Self explanatory (for 401(k))	10Y after termination	PW	
F47	2	Human Resources			Verification of Single Marital Status	Self explanatory (for 401(k))	10Y after termination	PW	12/11/19
F47	3	Human Resources	hr(eng-1)(z)/Benefits/401K	✓	Verification of Single Marital Status	Self explanatory (for 401(k))	10Y after termination	PW	3/4/21
F97	0	Human Resources	hr(eng-1)(z)/HRQR office > AND ISO9000complete > department folders		Human Resource Qualification Record	Self explanatory	10Y after termination	PW	
F119	0	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Application for Employment - Office	Self explanatory	10Y after termination	PW	9/23/19
F120	0	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Application for Employment - Plant	Self explanatory	10Y after termination	PW	9/23/19
F124	0	Human Resources		✓	Progress Review Worksheet	Self explanatory	10Y after termination	PW	10/21/20

Tempco Electric Heater Corp.
Form Control Spreadsheet - F104
Revised 2/19/25

Form #	Revision #	Controlling Department or Individual	Form Location	Branded	Form/Record Description	Use	Retention Period	Approval	Revision Date / Notes
F124	1	Human Resources	Media Prod: ISO9001/Forms/HR_Forms/	✓	Progress Review Worksheet	Self explanatory	10Y after termination	PW	3/4/21
PURCHASING									
F49	0	Purchasing		✓	SHIPPING SUPPLIES REQ/LISTING	Self explanatory	3 Years	PW	
F49	1	Purchasing	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F49_ShippingSupplyList_Rdr.pdf	✓	Shipping Supplies Requisition / Listing	Self explanatory	3 Years	PW	3/4/21
F50	0	Purchasing		✓	SCRAP ITEMIZATION FORM	Self explanatory	3 Years	PW	
F50	1	Purchasing	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F50_ScrapItemizationForm_Rdr.pdf	✓	Scrap Itemization Form	Self explanatory	3 Years	PW	3/4/21
F117	0	Purchasing	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/01/F117_ReturntoVendor_Rdr.pdf	✓	Return to Vendor	self explanatory		PW	6/18/19
F128	0	Purchasing	http://intranet.tempco.com/purchasing-iso-forms/	✓	Supplier Quality Expectations - Survey	self explanatory		PW	5/31/24
SALES/OFT									
F54	0	Sales/OFT			Credit issue request	Request for customer credit memo issuance	7 Years	PW	
F54	1	Sales/OFT			Credit issue request	Request for customer credit memo issuance	7 Years	PW	7/30/12
F54	2	Sales/OFT			Credit Issue Request	Request for customer credit memo issuance	7 Years	PW	
F54	3	Sales/OFT		✓	Credit Issue Request	Request for customer credit memo issuance	7 Years	PW	3/3/20
F54	4	Sales/OFT	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F54_CreditIssueRequest_Rdr.pdf	✓	Credit Issue Request	Request for customer credit memo issuance	7 Years	PW	3/4/21
F64	0	Sales/OFT			Travel Request Form	Self explanatory	3 Years	PW	
F64	1	Sales/OFT		✓	Travel Request Form	Self explanatory	3 Years	PW	3/3/20
F64	2	Sales/OFT	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F64_TravelRequest_Rdr.pdf	✓	Travel Request Form	Self explanatory	3 Years	PW	3/4/21
F65	0	Sales/OFT			Bill of lading	Self explanatory	7 Years	PW	
F65	1	Sales/OFT	http://intranet.tempco.com/wordpress/wp-content/uploads/2019/11/F65_BillOfLading_Rdr.pdf	✓	Bill of lading	Self explanatory	7 Years	PW	6/14/19
F69	0	Sales/OFT			Visitor confidentiality agreement	Protection of confidential/proprietary info	7 Years	PW	
F69	1	Sales/OFT			Visitor confidentiality agreement	Protection of confidential/proprietary info	7 Years	PW	?
F69	2	Sales/OFT		✓	Visitor Confidentiality Agreement	Protection of confidential/proprietary info	7 Years	PW	9/1/18
F69	3	Sales/OFT	Media Prod: ISO9001/Forms/Sales_Forms/	✓	Visitor Confidentiality Agreement	Protection of confidential/proprietary info	7 Years	PW	3/4/21
F107	0	Sales			Potential Rep/Distributor for Tempco	Self explanatory	3 Years	PW	
F107	1	Sales		✓	Potential Rep/Distributor for Tempco	Self explanatory	3 Years	PW	3/3/20
F107	2	Sales	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F107_PotentialRepDistrb_Rdr.pdf	✓	Potential Rep/Distributor for Tempco	Self explanatory	3 Years	PW	3/4/21
F108	0	Sales			Potential Rep/Distributor for Tempco - Spanish	Self explanatory	3 Years	PW	
F108	1	Sales		✓	Potential Rep/Distributor for Tempco - Spanish	Self explanatory	3 Years	PW	3/3/20
F108	2	Sales	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F108_PotentialRepDistrb_SP_Rdr.pdf	✓	Potential Rep/Distributor for Tempco - Spanish	Self explanatory	3 Years	PW	3/4/21
F118	0	Sales/OFT	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/10/F118_ControlPanelQuoteRequest_Rdr.pdf	✓	Custom Temp. Control Panel RFQ	self explanatory		PW	6/18/19
INFORMATION TECHNOLOGY									
F111	0	IT			Computer Program Modification/Development Request	Self Explanatory	3 Years	PW	5/27/14
F111	1	IT			Computer Program Modification/Development Request	Self Explanatory	3 Years	PW	12/11/19
F111	2	IT	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F111_ProgramReqForm_Rdr.pdf		Computer Program Modification/Development Request	Self Explanatory	3 Years	PW	3/4/21
MANUFACTURING/ENGINEERING									
F80	0	Mfg/Engr		—	QC 1st Article Inspection Report	Self explanatory	Permanent	PW	Needs to be Correctly Branded
F80	1	Mfg/Engr	eng-1/QCDocuments/Quality Production Files	—	QC 1st Article Inspection Report	Self explanatory	Permanent	PW	3/4/21
F83	0	Mfg/Engr			Certificate of Compliance	Self explanatory	7 Years	PW	
F83	1	Mfg/Engr			Letter of Compliance - Manufacturing	Self explanatory	7 Years	PW	10/3/12
F83	2	Mfg/Engr			Letter of Compliance - Manufacturing	Self explanatory	7 Years	PW	2/26/13
F83	3	Mfg/Engr			Letter of Compliance - Manufacturing	Self explanatory	7 Years	PW	4/1/17
F83	4	Mfg/Engr			Letter of Compliance - Manufacturing	Self explanatory	7 Years	PW	5/21/19
F83	5	Mfg/Engr			Letter of Compliance - Manufacturing	Self explanatory	7 Years	PW	5/28/19
F83	6	Mfg/Engr	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/02/F83_CertCmplnc_Mnfctr_Rdr.pdf	✓	Certificate of Compliance [- Manufacturing]	Self explanatory	7 Years	PW	9/12/19
F84	0	Mfg/Engr	k-drive/_CE Conformity documents issued/CE DoC Letter Sample-.docx > Media Prod: ISO9001/Forms/Engineering_Forms/F84...		Declaration of Conformity	Self explanatory	7 Years	PW	
F84	1	Mfg/Engr	Media Prod: ISO9001/Forms/Engineering_Forms/F84_DecofCnfrnty.pdf		Declaration of Conformity	Self explanatory	7 Years	PW	Branded 12/16/2019
F85	0	Mfg/Engr	Stored in LD Department (photocopies are made)	—	Incoming Coiling Work Log-LD for Tub, LD, CB	Self explanatory	3 Years	PW	
F87	0	Mfg/Engr	Stored in HD Department (photocopies are made)	—	HD Terminations Log	Self explanatory	3 Years	PW	
F88	0	Mfg/Engr	Stored in HD Department (photocopies are made)	—	HD Request for Outside Services	Self explanatory	3 Years	PW	
F91	0	Mfg/Engr	Joe P's My Documents > Media Prod: ISO9001/Forms/Engineering_Forms/F91...		Certificate of Calibration - Controls Dept	Self explanatory	3 Years	PW	

Tempco Electric Heater Corp.
Form Control Spreadsheet - F104
Revised 2/19/25

Form #	Revision #	Controlling Department or Individual	Form Location	Branded	Form/Record Description	Use	Retention Period	Approval	Revision Date / Notes
F91	1	Mfg/Engr	Media Prod: ISO9001/Forms/Engineering_Forms/F91...	✓	Certificate of Calibration - Controls Dept	Self explanatory	3 Years	PW	3/3/20
F122	0	Mfg/Engr	N:\PC_Panel Products\	✓	Checklist for Control Panel Testing	Self explanatory	3 Years	PW	8/12/20
ISO									
F104	0	ISO	Media Prod: ISO9001/Forms/F104_FormControlSpreadsheet.xlsx		Forms Control Sheet	Self explanatory - Initial Creation 6-5-09	Permanent	PW	4/1/21
F113	0	ISO			Internal Audit Notes	Self Explanatory	3 Years	PW	6/5/15
F113	1	ISO			Internal Audit Notes	Self Explanatory	3 Years	PW	
F113	2	ISO		✓	Internal Audit Notes	Self Explanatory	3 Years	PW	12/11/19
F113	3	ISO	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F113_InternalAuditNotes_Rdr.pdf	✓	Internal Audit Notes	Self Explanatory	3 Years	PW	3/4/21
F115	0	ISO	Paul will discuss with Dan regarding maintaining this on the spreadsheet		Risk Management and OFI Matrix	Self Explanatory	Current Version	PW	5/14/18
F116	0	ISO	Paul will discuss with Dan regarding maintaining this on the spreadsheet		Quality Objectives Matrix	Self Explanatory	Current Version	PW	5/14/18
F123	0	ISO	Media Prod: ISO9001/Forms/ISO_Forms/		ISO Internal Audit Report	Self Explanatory	7 Years	PW	3/11/21
PURCHASING/ENGINEERING/RESALE									
F105	0	Purch/Engr/Resale			Engineering Verification Form for Resale Product	Self explanatory	3 Years	PW	10/3/12
F105	1	Purch/Engr/Resale	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/09/F105_EngVrftn_Resale_Rdr.pdf	✓	Engineering Verification Form for Resale Product	Self explanatory	3 Years	PW	6/14/19
RESALE									
F106	0	Resale			Letter of Compliance - Resale	Self explanatory	7 Years	PW	10/3/12
F106	1	Resale			Letter of Compliance - Resale	Self explanatory	7 Years	PW	2/26/13
F106	2	Resale			Letter of Compliance - Resale	Self explanatory	7 Years	PW	5/20/19
F106	3	Resale			Letter of Compliance - Resale	Self explanatory	7 Years	PW	6/14/19
F106	4	Resale			Letter of Compliance - Resale	Self explanatory	7 Years	PW	6/20/19
F106	5	Resale	http://intranet.tempco.com/wordpress/wp-content/uploads/2020/02/F106_CertCmplnc_Resale_Rdr.pdf	✓	Letter of Compliance - Resale	Self explanatory	7 Years	PW	Added "Additional Information" section - 1/7/20
ACCOUNTING/OFT									
F112	0	Accounting/OFT			Freight Billing Form	Self Explanatory	3 Years	PW	5/27/14
F112	1	Accounting/OFT			Freight Billing Form	Self Explanatory	3 Years	PW	9/29/15
F112	2	Accounting/OFT			Freight Billing Form	Self Explanatory	3 Years	PW	3/3/20
F112	3	Accounting/OFT	http://intranet.tempco.com/wordpress/wp-content/uploads/2021/03/F112_FrghtBlngFrm_Rdr.pdf		Freight Billing Form	Self Explanatory	3 Years	PW	3/4/21
PURCHASED FORMS / PRODUCED IN HOUSE									
FORM-1	0	Purchased Forms			PURCHASE ORDER, SINGLE SHEETS	Self explanatory	7 Years	PW	
FORM-1	1	Purchased Forms	Paper: Stock Room Digital: Media Prod: ISO9001/Forms/Purchased_Forms/FORM-1 Purchase Order/FORM-1_POB&W1-2018.pdf		PURCHASE ORDER, SINGLE SHEETS	Self explanatory	7 Years	PW	5/14/18
FORM-1	2	Purchased Forms	Paper: Stock Room Digital: Media Prod: ISO9001/Forms/Purchased_Forms/FORM-1 Purchase Order/FORM-1_POB&W1-2018.pdf Rev 2 digital copy received 2/19/25 and saved to Purchased_Forms folder		PURCHASE ORDER, SINGLE SHEETS Form is housed and updated by Allegra	Self explanatory	7 Years	PW	8/21/24
FORM-2	0	Purchased Forms			ACKNOWLEDGEMENT, SINGLE SHEETS	Acknowledgement of customer order	7 Years	PW	
FORM-2	1	Purchased Forms	Paper: Stock Room Digital: Media Prod: ISO9001/Forms/Purchased_Forms/FORM-1 Purchase Order/FORM-2 AcknowledgementISO/		ACKNOWLEDGEMENT, SINGLE SHEETS	Acknowledgement of customer order	7 Years	PW	4/3/18
FORM-3A	0	Purchased Forms			INVOICE - SINGLE SHEET	Self explanatory	7 Years	PW	
FORM-3A	1	Purchased Forms	Paper: Stock Room Digital: Media Prod: ISO9001/Forms/Purchased_Forms/FORM-1 Purchase Order/FORM-2_AckB&W4-2018ForPrinter.qxp		INVOICE - SINGLE SHEET	Self explanatory	7 Years	PW	4/3/18
FORM-3A	2	Purchased Forms	Paper: Stock Room Digital: Media Prod: ISO9001/Forms/Purchased_Forms/FORM-3A Invoice ISO/Form-3A_Invoice5-19ISOofElectronic.pdf		INVOICE - SINGLE SHEET	Self explanatory	7 Years	PW	5/14/18
FORM-5	0	Purchased Forms			MATERIAL REQUEST FORM	Self explanatory	3 Years	PW	
FORM-5	1	Purchased Forms	Paper Copies still exist, but are being phased out. Replaced by F70 which is now generated electronically		MATERIAL REQUEST FORM	Self explanatory	3 Years	PW	7/2/14
FORM-6	0	Purchased Forms			RETURN TO STOCK NOTICE	Self explanatory	3 Years	PW	
FORM-6	1	Produced in house	Paper: Throughout Shop Digital: Media Prod: ISO9001/Forms/InHouse_Forms/FORM-6_ReturnStock.pdf		RETURN TO STOCK NOTICE	Self explanatory	3 Years	PW	7/2/14
FORM-7	0	Purchased Forms			PACKING SLIP (ASPC#10) - MADE UP RECEIVER	Used as a made up receiver	7 Years	PW	
FORM-7	1	Produced in house	Paper: Incoming QC/Shipping Digital: None (item is photocopied)		PACKING SLIP (ASPC#10) - MADE UP RECEIVER	Used as a made up receiver	7 Years	PW	
FORM-15A	0	Purchased Forms	Paper: Stock Room Digital: Media Prod: ISO9001/Forms/Purchased_Forms/FORM-15A Production Order/		PRODUCTION ORDERS-SINGLE SHEET	Self explanatory	7 Years	PW	
FORM-24	0	Purchased Forms			PACKING LIST, SINGE SHEETS - TEMPCO FORM	Self explanatory	7 Years	PW	
FORM-24	1	Purchased Forms			PACKING LIST, SINGE SHEETS - TEMPCO FORM	Self explanatory	7 Years	PW	5/14/18

Tempco Electric Heater Corp.
Form Control Spreadsheet - F104
Revised 2/19/25

Controlling									
Form #	Revision #	Department or Individual	Form Location	Branded	Form/Record Description	Use	Retention Period	Approval	Revision Date / Notes
FORM-24	2	Purchased Forms	Paper: Stock Room Digital: Media Prod: ISO9001/Forms/Purchased_Forms/FORM-24 Packing List/		PACKING LIST, SINGE SHEETS - TEMPCO FORM	Self explanatory	7 Years	PW	6/28/18
FORM-30A	0	Purchased Forms	Paper: Accounting Department		ACCOUNTS PAYABLE LASER CHECK	Self explanatory	7 Years	PW	
FORM-34	0	Purchased Forms	Paper: Stock Room		BUY CARD - TOOL ROOM USE ONLY	Self explanatory	3 Years	PW	
FORM-37	0	Purchased Forms	Paper: Human Resources		WEEKLY TIME SHEET	Self explanatory	7 Years	PW	
TAGS-QC	0	Purchased Forms	Stock Room: Red Tags - used in QC		PRODUCT NON-CONFORMANCE TAG	Self explanatory	Comple. of Disposit'n	PW	
ELECTRONIC FORMS/COMPUTER PROGRAMS									
Electronic	N/A	I/T			ChangeOrder.pdf	Request to change product specifications	7 Years		Replaced F55 - 5/15
Electronic	N/A	I/T			CustomerSamples-fax	This sheet is sent to customer. Customer	7 Years	PW	8/2/13
Electronic	N/A	I/T			CustomerSamples-return-to-customer	This sheet goes with customer part when it is	7 Years	PW	8/2/13
Electronic	N/A	I/T			ECO-print-internal-copy .pdf	Printed on demand.	7 Years	PW	8/2/13
Electronic	N/A	I/T			Expedite-print-internal-copy .pdf	Printed on demand.	7 Years	PW	8/2/13
Electronic	N/A	I/T			Incomqc-non-conformance.pdf	1 copies printed: one travels with part, other	7 Years	PW	8/2/13
Electronic	N/A	I/T			Incomqc-print-purchase-order.pdf	Printed on demand.	7 Years	PW	8/2/13
Electronic	N/A	I/T			RMA-print-accounting-credit-disposition.pdf	Travels to Carol for processing with the RMA	7 Years	PW	8/2/13
Electronic	N/A	I/T			RMA-print-internal-copy .pdf	Printed on demand.	7 Years	PW	8/2/13
Electronic	N/A	I/T			RMA-return-authorization-fax.pdf	Sent to customer. Customer must return	7 Years	PW	8/2/13
Electronic	N/A	I/T			SA2order.pdf	Shows details of order.	7 Years	PW	8/2/13
Electronic	N/A	I/T			qclog-internal-copy .pdf	Printed on demand.	7 Years	PW	8/2/13
Electronic	N/A	I/T			Customer Supplied PO	Generated on demand	7 Years	PW	11/14/24
Note regarding electronic forms: The control of these forms rests with the I/T department in that only authorized people can change these forms and the form that appears when called up will always be the current version of the form. Consequently, revision numbers and dates are not tracked.									