

Summary of Changes

Legislature and Legislators Records Retention Schedule v.1.1 (June 2021)

(Updates the Office of the State Actuary Records Retention Schedule and merges this into the Legislature and Legislators Records Retention Schedule)

New Records Series Added

- Two (2) existing new records series from the former *Office of the State Actuary Records Retention Schedule* have been added to this records retention schedule:
 1. **Actuary Services (Demographic Experience Studies)** (*was* Documentation of Five Year Experience Studies of the Retirement Systems) (**DAN 86-01-35987**) p.4
“1 year after subsequent study completed (Non-Archival)”
 2. **Actuary Services (General)** (*was* Documentation of Actuarial Valuations, Valuation Documentation, Copy 1) (**DAN 86-01-35985**) p.4
“6 years after communication sent/report published (Non-Archival)”

Retention Changes

- Two (2) records series have changes to their retention period/cutoff:
 1. **Actuary Services (Demographic Experience Studies)** (*was* Documentation of Five Year Experience Studies of the Retirement Systems) (**DAN 86-01-35987**) p.4
Decreased from “25 years after subsequent valuation is prepared (Non-Archival)” to “1 year after subsequent study completed (Non-Archival)”
 2. **Actuary Services (General)** (*was* Documentation of Actuarial Valuations, Valuation Documentation, Copy 1) (**DAN 86-01-35985**) p.4
Decreased from “25 years after subsequent valuation is prepared (Non-Archival)” to “6 years after communication sent/report published (Non-Archival)”

Other Minor Changes

- Two (2) records series have changes to their title and/or description:
 1. **Actuary Services (Demographic Experience Studies)** (*was* Documentation of Five Year Experience Studies of the Retirement Systems) (**DAN 86-01-35987**) p.4
 2. **Actuary Services (General)** (*was* Documentation of Actuarial Valuations, Valuation Documentation, Copy 1) (**DAN 86-01-35985**) p.4

Essential Designation Changes

- None

Archival Designation Changes

- None

Archival Series Being Revoked

- A total of 3 “Archival” records series from the former *Office of the State Actuary Records Retention Schedule* are being revoked.
- Two (2) “Archival” records series are being revoked as they are covered by another “Archival” records series:
 1. **Five Year Experience Studies of Retirement Systems (DAN 86-01-35988)** covered by State Publications (DAN GS 15008)
 2. **Select Committee on Pension Policy Meeting Files (DAN 00-05-59747)** covered by Meeting Records (DAN 20-12-69616)
- One (1) “Archival” records series is being revoked as it is covered by other “Archival and “Non-Archival” records series:
 1. **Studies Relating to Retirement Issues (DAN 86-01-35989)** covered by State Publications (DAN GS 15008) (Archival) and Studies (Major) – Working Papers/Development (DAN GS 09030) (Non-Archival)

Non-Archival Series Being Revoked

- A total of 3 “Non-Archival” records series from the former *Office of the State Actuary Records Retention Schedule* are being revoked.
- One (1) “Non-Archival” records series is being revoked as it is covered by another “Archival” records series:
 1. **Actuarial Valuations, Copy 1 (DAN 86-01-35986)** covered by State Publications (DAN GS 15008)
- One (1) “Non-Archival” records series is being revoked as it is covered by another “Non-Archival” records series:
 1. **Contribution Rate Recommendation – Copy 2 (DAN 86-01-35990)** covered by Actuary Services (General) (DAN 86-01-35985)
 2. **Option Factors (DAN 00-05-59748)** covered by Actuary Services (General) (DAN 86-01-35985)

Net Reduction in Records Series: 6 (from 22 series down to 16 series)