

Summary of Changes Since Last Schedule Review (November, 2005)

Approved by SRC	Record Series	DAN Number	Extent of Revision
02/02/05	Contracts for Purchases, Purchased Services, Leases or Rentals	GS 01050	Description Revision
		GS 01	
	Calendars, Executive	GS 10008	Note added to print out electronic format as often as necessary to Provide a daily record
		GS 10	Title Revision
		GS 09	Revision to Introduction Statement
		GS 06	Title Revision
10/12/05	Financial Reports, Monthly & Daily, Agency Copy	GS 02005	Cut-off Changed from "Destroy after Reconciliation" to Date of Report Added Note that copies not used for reconciliation can be destroyed after Administrative purpose is served
10/12/05	Project Files	GS 09018	Title changed from "Major" and Description updated
11/05	Agency Credit Cards Usage or On Line Ordering Back Up Documentation	GS 01018	Record Series Discontinued
	Allotments	GS 01042	Record Series Discontinued
	Budget Activity Status Report	GS 01045	Record Series Discontinued
	Capital and Operating Budgets	GS 01041	Record Series Discontinued
	Cash Receipts Journal Summary	GS 01008	Record Series Discontinued
	Encumbrance and Liquidation Records	GS 01005	Record Series Discontinued
	Fiscal Office Administrative Files	GS 01015	Record Series Discontinued

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	Program Expenditure Ledger	GS 01044	Record Series Discontinued
	Warrant Register – Detail	GS 01002	Record Series Discontinued
	CAFR Annual Reports	GS 02021	Record Series Discontinued
	Daily Reports	GS 02003	Record Series Discontinued
	DTR-TAS Reports	GS 02001	Record Series Discontinued
	DTR9 -In Process Reports	GS 02002	Record Series Discontinued
	IRS -IRS 100 IRS 110 Reports	GS 02010	Record Series Discontinued
	Journal Vouchers – Posted to AFRS	GS 02007	Record Series Discontinued
	QWP Quarterly Reports	GS 02006	Record Series Discontinued
	TARRPT The Allotment Preparation System	GS 02011	Record Series Discontinued
	Weekly Reports	GS 02004	Record Series Discontinued
	Agency Reduction In Force Plan	GS 03018	Record Series Discontinued
	Grievances	GS 03014	Record Series Discontinued
	State Auditor’s Report of Examinations, Agency Copy	GS 04003	Record Series Discontinued
	Public Information Office, Administrative Files	GS 05006	Record Series Discontinued
	Property Disposal Request	GS 06003	Record Series Discontinued
	Purchasing Contract Documents	GS 06005	Record Series Discontinued
	Customer Service Agreement	GS 08003	Record Series Discontinued
	Calendars, Appointment Books, Routine Telephone Logs	GS 09011	Record Series Discontinued
	Minutes and Files of Policy Setting Minutes	GS 09010	Record Series Discontinued
	Reading or Day Files	GS 09004	Record Series Discontinued

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	Reports of Routine Planning and Studies	GS 09007	Record Series Discontinued
	Transitory Administrative Files	GS 09003	Record Series Discontinued
	Microfilm Services	GS 11002	Record Series Discontinued
	Records Management Policies and Procedures	GS 11008	Record Series Discontinued
	Records Management Program Subject Files	GS 11007	Record Series Discontinued
	Forms Management Program Subject Files	GS 12004	Record Series Discontinued
	Applications and Permits – Periodical Mail (2 nd Class)	GS 13005	Record Series Discontinued
	Mail Services Subject Files	GS 13002	Record Series Discontinued
	Network Circuit Inventories	GS 14030	Record Series Discontinued
	Network Implementation Project Files	GS 14034	Record Series Discontinued
	Training Course Information	GS 14027	Record Series Discontinued
	Master Job Cards	GS 15002	Record Series Discontinued
	Publication and Duplication Subject Files	GS 15006	Record Series Discontinued
	Publication Job Files	GS 15003	Record Series Discontinued
	Equipment and Furniture Inventories	GS 16001	Record Series Discontinued
	Legislative Contact Reports	GS 19005	Record Series Discontinued
	Legislative Correspondence	GS 19003	Record Series Discontinued
	Agency Wide Affirmative Action Plans, Policies and Procedures	GS 20001	Record Series Discontinued
	Affirmative Action Subject Files	GS 20003	Record Series Discontinued

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	Facility Management Subject Files	GS 21009	Record Series Discontinued
	Lease Files	GS 21005	Record Series Discontinued
	Land Administration Files	GS 24002	Record Series Discontinued
	Agreements, Inter-Agency, Intra-Agency and Inter-Governmental	GS 06008	NEW Records Series
	Building Access Documentation	GS 25001	NEW Records Series
	Commute Trip Reduction Documentation	GS 03037	NEW Records Series
	Complaints, , Harassment and Discrimination	GS 03038	NEW Records Series
	Construction Documentation, Non-General Administration Capital Projects	GS 21010	NEW Records Series
	Contracts, Client Services	GS 06009	NEW Records Series
	Deliverables	GS 23005	NEW Records Series
	Exit Interview, Personnel	GS 03040	NEW Records Series
	External Audit, Final Audit or Examination Report	GS 04005	NEW Records Series
	Financial Reports, Fiscal Year End, Agency Copy	GS 01067	NEW Records Series
	History Files	GS 10013	NEW Records Series
	Land Sales and Conveyance Documentation	GS 24009	NEW Records Series
	Microfilm/Imaging Documentation File	GS 11011	NEW Records Series
	Motor Vehicle Title	GS 16009	NEW Records Series
	Non-Attorney General Legal Case Files	GS 18005	NEW Records Series

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	Notes, Legislative	GS 01065	NEW Records Series
	Personnel Record Folders, Retired Employees	GS 03041	NEW Records Series
	Portfolio Management Documentation, Agency Copy	GS 14036	NEW Records Series
	Project Files	GS 09018	NEW Records Series
	Project Planning and Documentation, Information Technology	GS 14037	NEW Records Series
	Reports and Information, Telecommunications	GS 08005	NEW Records Series
	Safety Drills/Disaster Recovery Exercise	GS 25002	NEW Records Series
	Security Recordings	GS 25003	NEW Records Series
	State Auditor's Office Audit Results, Agency Copy	GS 04006	NEW Records Series
	Subject Files	GS 09019	NEW Records Series
	Survey Responses, Individual	GS 09020	NEW Records Series
	Vehicle Accident Report Form, Agency Copy	GS 16010	NEW Records Series
	Vendor Payment Information	GS 01004	NEW Records Series
01/04/06	Training & Development Files (State Employees, Contractors, Customers)	GS 22004	Revised Title and Description
04/07/06	Personnel Complaints, Exonerated, Represented Employees	GS 03006	New Series

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04/07/06	Personnel Complaints, Upheld, Non-Represented Employees	GS 03005	New Series
04/07/06	Personnel Record Folders, Retired Employees	GS 03041	New Series
04/07/06	Combined Fund Drive		New Series – Under GS 09; however it is not listed in GS. Approved by SRC pending description expansion. Draft records sent to Tricia at Personnel to confirm what types of docs should not be kept under this Series
04/07/06	Personnel Records		New Series – Approved by SRC; however, not listed in GS
05/03/06	Resolutions		New Series – Approved by SRC; however, not listed in GS
05/03/06	State Government Publications		New Series – Approved by SRC; however, not listed in GS
06/07/06	Interpretive and Policy Statements		New Series – Approved by SRC; however, not listed in GS
06/07/06		GS 03043	SRC agreed for a NOTE to be added to description. SRC approved; However, not listed in GS

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10/04/06	State General Records Retention Revision Procedures		<p>Revised Title to “Procedures for State Agency Records Officers to Propose Revisions to the State General Records Retention Schedule.</p> <p>Changed title of 1st Paragraph to “Recommendation for New Records Series to the State General Records Retention Schedule”. Changed Title of 2nd Paragraph to “Recommendations for Records Series to be Revised in the State General Records Retention Schedule.”</p> <p>Changed 3rd sentence of 3rd paragraph to “Records Officer’s who forward Comments to the Records Management Office will be invited to attend The SRC meeting to discuss the proposed new records series.”</p>
11/01/06	State General Records Retention Revision Procedures		<p>Change all references of “memo” to “Memorandum” in the Records Management Office section. Change “...of each month” at the end of The 2nd sentence to “prior to the scheduled meeting”.</p>
04/04/07	State General Records Retention Schedule Glossary Review		Removal of Program Level Records Definition
01/02/08	Injury Claims	GS 03015	Retention increased form 6 years to 7 years
01/02/08	Quality and Performance Improvement Documentations	GS 10011	Title and Description revised
01/02/08	Internal Audit, Final Audit or Examination Report	GS 04002	Archival Designation added

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03/07/08	Banking Records	GS 01013	Note Added that substitute checks will replace the hard copy of the Cancelled check/warrant
04/03/08	Voluntary Employee's Beneficiary Association (VEBA)	GS 03045	New Series