

RECORDS RETENTION SCHEDULES 10.24.2024



200 North Street
Jackson, Mississippi 39201

Red color text indicates the records must be transferred to the State Archives.

Records Retention Schedules have force and effect of law, and includes all records regardless of format. Agencies may not dispose of records that are not covered under a general or agency specific retention schedules approved by the State Records Committee.

General retention schedules may be amended at quarterly meetings in January, April, July and October. Please verify that you have the most current version of this packet. State agency specific schedules are available online at <http://records.mdah.state.ms.us/appschedules.php>

Accounting Records

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G131	Accounting & Budget - State Funded	Accounts payable & receivable, allocations, agency copy of audit reports, banking, CAFR, credit and P-card files, disbursements, financial correspondence, GAAP reports, ledgers, petty cash, purchase orders, receipts, reconciliation, reimbursement, requisitions, sale of commodities, sales tax records, shipping/receiving, statewide accounting system reports, travel, trial balance, vendor payment files, warrants, and related accounting and budget files.	Hold records three (3) years after audit, then dispose.	7/15/2021
G132	Accounting & Budget Federal and non-state funded	Series includes accounts payable & receivable, allocations, agency copy of audit reports, banking, CAFR, credit and P-card files, disbursement, financial correspondence, GAAP reports, ledgers, petty cash, purchase orders, receipts, reconciliation, reimbursement, requisitions, sale of commodities, sales tax records, shipping/receiving, statewide accounting system reports, travel, trial balance, vendor payment files, warrants, and related accounting and budget files.	Hold records five (5) years, then dispose. Audit must have been released for three (3) years prior to disposal.	7/15/2021

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Administration Records

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G3	Requests for Public Records	Requests for information under the MS Public Records Act of 1983.	Hold original or authenticated reproduction three (3) years; then destroy. If denial in litigation, hold until litigation resolved.	11/12/1987
G9	Attorney General Opinions within State Agencies	Opinions issued by the Attorney General's Office on civil litigation.	Hold original or authenticated reproduction three (3) years or until no longer needed; then destroy.	9/22/1988
G12	Records Transmittal and Receipt (Agency Copy)	Agency copy of (Form SRC-102).	Hold until records stored at the State Records Center have been destroyed; then destroy Records Transmittal and Receipt form.	4/6/1989
G13	Records Destruction Certificate (Agency Copy)	Agency copy of Form SRC-104.	Hold three (3) years; then destroy.	4/6/1989
G33	Director's Files	Director's Files contain incoming and outgoing correspondence, policies and procedures, internal memos and reports, agency/organizational reviews, program development records, subject/administrative materials, non-routine fiscal data, and other files related to the overall historical, legal, and administrative functions of an agency or commission. Such files may be generated and received in paper or electronic format, or a combination of the two. Confidential files (e.g., personnel) or proprietary information which may be exempt from public disclosure should be filed separately.	Paper files: hold in current files area five (5) years or until administrative, legal, and fiscal need has been met; transfer to State Archives. If paper records are electronically imaged, follow the standards of the Department of Archives and History and dispose of paper files only after electronic files have been transferred to State Archives. Electronic files: create regular back-ups and transfer to the State Archives at least every five (5) years.	4/17/2008

G34	Support Files of Minutes of a State Public Body	This series contains files and working papers which support the minutes of a state public body as defined in § 25-61-3(a). Included are agendas, correspondence, official meeting books, executive officer reports, handouts, audio/visual materials, recordings of meetings, and related material. Files may be generated and received in paper or electronic format, or a combination of the two. Confidential files (e.g. personnel) or proprietary information which may be exempt from public disclosure should be filed separately.	Hold original or authenticated reproduction at the office of the public body for no more than ten (10) years, then transfer to State Archives.	10/23/2008
G35	Minutes of a State Public Body	This series contains the official minutes of a state public body as defined in MCA 25-61-3(a). The official minutes may be generated in paper or electronic format, or a combination of the two. Confidential or proprietary information shall be identified prior to transfer to State Archives.	Hold original, including electronic, at the office of the public body for no more than ten (10) years, then transfer to State Archives.	10/23/2008
G62	Transitory Correspondence	Routine correspondence, including e-mail and typed memos of non-executive staff. Transitory messages are not intended to formalize or perpetuate knowledge and do not set policy, establish guidelines or procedures; certify a transaction, or become a receipt. Includes reminders about scheduled meetings or appointments, telephone messages, announcements of office events and recipient copies of announcements of events such as lectures, exhibits, workshops, etc.	Delete or dispose of upon receipt or after event.	10/20/2011

G69	Minutes that do not establish policy, precedence or rules.	This series usually contains the minutes of a unit of a state public body as defined in MCA 25-61-3(a), which does not formalize the policy, precedence or rules of the agency. These may be generated in paper or electronic format, or a combination of the two.	Hold original at the office of the public body until lapse of administrative need; then dispose.	1/19/2017
G88	Official and Executive Subject Files	May consist of letters, memorandums, attachments, reports and related material. These files may relate to any topic such as an action, event, person, place or other subject to support a current or potential business task, function or decision, and serve as official or executive information. These files differ from specific case files or direct work files of an agency.	Hold three (3) years then transfer to Archives.	7/20/2017
G89	Staff Subject Files	May consist of letters, memorandums, attachments, reports and other related material. These files may relate to any topic such as an action, event, person, place or other subject to support a current or potential business task, function or decision, but not the official decision or copy of the agency. These file differ from specific case files or direct work files of an agency.	Hold until lapse of administrative need, then dispose.	7/20/2017
G90	Staff Desk Reference Files	Any document or copy of a document made or kept in the course of routine daily activity solely for reference purposes. These files may include copies of policies, procedures, interoffice memos; copies of individual personnel files; draft copies of correspondence and speeches; form letters, etc.	Hold until lapse of administrative need, then dispose.	7/20/2017

G103	Organization Charts	This series consists of organizational charts for the agency, to include all non-exempt information for all PINS and contract employees.	Transfer paper or electronic copy to Archives at the end of each State Fiscal Year for the preceding year. All previous years' organizational charts in the possession of each agency shall be forwarded to Archives upon passage.	1/18/2018
G104	Strategic Plans	This series may include demographic and statistical information with missions, goals, objectives of and agency and all subdivisions. This may also be called a five-year plan.	Transfer paper or electronic copy to Archives as the Strategic Plan is amended, but at least every five (5) years.	1/18/2018
G105	Agency Legislative Files	This series may include copies of bills passed, copies of proposed bills, conference committee reports, correspondence, analysis and recommendations of bills, and working papers containing tax levy documents, and amortization schedules.	Hold five (5) years; then dispose.	1/18/2018
G106	Policy Development Files	This series consists of files related to development of official policies that are not part of the Executive Director's Files. Included may be e-mails, memos, historical policies, correspondence, draft impact statements, draft financial impact statements, data reports, drafts of policies, revisions, and final policies.	Hold until policies are implemented, files are no longer relevant, or three (3) years; then dispose.	1/18/2018
G117	Policy & Procedure Manuals (General Operations)	This series includes policy and procedure manuals to direct routine business operations of an agency.	Hold one (1) year after the document has been superseded, then dispose. Duplicate copies held at a state agency of state-wide policies are not required to be retained except as reference material. The creator of the policy/procedure manual in the agency is responsible for final disposition of the official copy. This includes both paper and electronic files.	10/22/2020

G118	Policy & Procedure Manuals (Historical)	This series includes manuals that document policies not filed under the Administrative Procedures Act but which impact the citizens of Mississippi. These manuals may also include the enforcement or transactions of state government as it relates to the laws of the federal or state government.	Transfer one (1) copy of document to State Archives. Confidential or proprietary information must be clearly marked prior to transfer.	10/22/2020
G119	Grant Applications & Closeout Reports (Awarded)	This series consists of the original and modified grant applications submitted by a state agency, board, or commission.	Hold five (5) years after close of grant, then transfer to State Archives.	10/22/2020
G120	Grant Operating Files (Awarded-Routine)	This series consists of files related to grants for which a state agency, board, or commission has received state, federal, or private funds. Included are budget modifications, correspondence, invoices, pay vouchers, and related files.	Hold five (5) years after close of grant, then dispose.	10/22/2020
G121	Grant Applications (Not Awarded)	This series consists of applications submitted by a state agency, board, or commission seeking grant funds but was not awarded to the submitting agency.	Hold one (1) year after notification of no award, then dispose.	10/22/2020
G123	Tax Incentive Program Files	This series consists of application forms, supplemental information, agency approval certification, work product, correspondence, and information transmittals to the Mississippi Department of Revenue for a state agency responsible for the review of tax incentive or credit programs.	Hold seven (7) calendar years after receipt, then dispose.	10/22/2020
G124	Loan Program Reports	This series consists of reports created to identify the loan recipient and may include name, property address, purpose, and status of the loan.	Annually transfer to State Archives.	10/22/2020

G125	Loan Program Files (Funded)	This series consists of loans provided by state government to individuals, businesses, or local government as part of a statutorily approved program. May include applications, confidential banking information, collateral, closing documents, appraisals, deeds of trust, invoices, promissory notes, correspondence, work product, bond documents, insurance information, status reports, and related material.	Hold three (3) years after loan is paid in full, then dispose.	10/22/2020
G126	Loan Program Files (Unfunded)	This series consists of rejected applications for loans offered by state government to individuals, businesses, or local government as part of a statutorily approved program. May include applications, confidential banking information, collateral, closing documents, appraisals, deeds of trust, invoices, promissory notes, correspondence, work product, bond documents, insurance information, status reports, and related material.	Hold one (1) year after notice to not fund, then dispose.	10/22/2020
G127	Grant Applications & Closeout Reports (Awarded)	This series consists of the original and modified grant applications submitted to a state agency, board, or commission.	Hold five (5) years after close of grant, then dispose. Audit must have been released three (3) years prior to disposal.	4/15/2021
G128	Grant Operating Files (Awarded - Routine)	This series consists of files related to grants by a state agency, board, or commission to a state, local or private entity.	Hold five (5) years after close of grant, then dispose. Audit must have been released three (3) years prior to disposal.	4/15/2021
G129	Grant Applications (Not Awarded)	This series consists of applications submitted to a state agency, board, or commission seeking grant funds but were not awarded to the submitting entity.	Hold one (1) year after notification of no award, then dispose. All challenges and litigation must be resolved prior to disposal.	4/15/2021

G184	Quality Control, Programmatic	This series includes records related to programmatic error rates for services for which an individual has applied. This may include applications, internal correspondence for correction, case actions, and summary information to improve the quality and effectiveness of services.	Hold three (3) years, then dispose.	7/18/2024
G186	Civil Rights Files	This series includes checklists, assurances of compliance, discrimination monitoring, reports, site-review information, and related files.	Hold five (5) years following final results or reports, then dispose. Open Department of Justice reviews or audits must have been concluded prior to destruction.	7/18/2024
G225	Emergency Preparedness Drills	Includes reports and records related to emergency preparedness drills including fire, disaster, tornado, and all files related to emergency and support services.	Hold in the current files area one (1) year; then dispose.	10/24/2024
G226	State-Wide Emergency Preparedness Drills	This series contains records pertaining to state-wide exercises including fire, tornado, and all other disaster preparedness drill files.	Hold in the current files area five (5) years; then dispose.	10/24/2024

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Administrative Procedures Act

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G23	Agency Orders	Under the Administrative Procedures Act (APA), each agency shall make all written formal orders available for public inspection and copying, subject to any confidentiality laws. These orders shall be indexed by name and subject.	Official agency copy must be held permanently. If previously held paper documents are electronically imaged, the image must be verified and may become the official record for this series for permanent retention. The form and format of electronic images must not restrict the ability of the public to obtain copies as outlined in applicable laws.	4/19/2007
G24	Declaratory Opinions	Under the Administrative Procedures Act (APA), any person with a substantial interest in the subject matter of an agency may make a written request for a declaratory opinion. The agency requested must maintain rules for the issuance of a declaratory opinion, and respond as provided for by law. Each agency is responsible for making the opinions available for public inspection; indexed by name and subject within the limits or confidentially statutes or exemption from public disclosure pursuant to other provisions of law.	Official agency copy must be held permanently. The history of the agency opinions shall be reflected through permanent retention of these records. If previously held paper documents are electronically imaged, the image must be verified and may become the official record for this series for permanent retention. The form and format of electronic images must not restrict the ability of the public to obtain copies as outlined in applicable laws.	4/19/2007

G25	Rule-Making Docket	Under the Administrative Procedures Act (APA), each state agency is required to compile, publish and make available the rules which affect the public. These rules are filed with the Secretary of State for inclusion in the Administrative Bulletin. The Rule-Making Docket contains the elements as required in applicable code for each pending rule-making proceeding and indicates the subject matter, citations to publications, location of public comment inspection, economic impact statement, current status, date of rule adoption, and effective date.	The official agency copy must be held permanently. If previously held paper documents are electronically imaged, the image must be verified by the agency and may become the official record for this series for permanent retention. The form and format of electronic images must not restrict the ability of the public to obtain copies as outlined in applicable laws. The creating agency need not send this series to MDAH, as the official copies of the rules filed with the Secretary of State are transferred to MDAH for archival retention under a separate records control schedule.	4/19/2007
G26	Rule-Making Record	Under the Administrative Procedures Act (APA), each agency shall make rules and other matter available to the public upon request. There may be some additional records not covered by a specific schedule, which may include correspondence regarding advice on rules, Secretary of State filing forms, rules for the conduct of an oral proceeding, official transcripts of oral proceedings, written comments on rules, newspaper publications, 5-year review of the agency APA rules, and other records which document the creation of any agency rule.	The history of the agency rule-making process shall be reflected through permanent retention of these records. It is important to retain this series for continuity of services and rules over time, and for providing the supportive documentation to evidence the decisions of an agency. If any of these pages are duplicated elsewhere, only one official copy must be retained. If previously held paper documents are electronically imaged, the image must be verified and may become the official record for this series for permanent retention. The form and format of electronic images must not restrict the ability of the public to obtain copies as outlined in applicable laws.	4/19/2007

Annual Reports

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G30	Annual Reports	This series includes the published annual reports of an agency.	Each agency will provide the State Archives with one (1) copy of their Annual Report at the end of the year, as published. This may be transferred electronically in the native format. One (1) copy shall also be provided to the MS. Library Commission in compliance with Section 25-51-1 et. seq. of the Mississippi Code of 1972, as amended.	10/25/2007

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Budget Records

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G4	Budget Request Forms	Applications for budget appropriation. Included are forms (MBR-1), (MBR-1) Supplement, (MBR-1-01), (MBR-1-02), (MBR-1-03), (MBR-1-04), (MBR-1-B), (MBR-1-D-1) and (MBR-1-3). (Additional forms in Budget Request Package).	Hold original or authenticated reproduction until audited and the following Fiscal Year Budget has been prepared; then destroy.	11/12/1987
G5	Budget Reports	Budget allocation by budget category and by six month allocation. Computer printouts showing fund balances and status. Included are Z1's, Monthly Budget Reports A & B, and Supplement A (includes monthly reconciliation).	Hold original or authenticated reproduction three (3) years after release of audit; then destroy.	11/12/1987
G66	Unofficial and Office Copies of Budget Reports and Forms	Budget allocation by budget category and by six month allocation. Computer printouts showing fund balances and status. Included are Z1's, Monthly Budget Reports A & B, and Supplement A (includes monthly reconciliation), Applications for budget appropriation. may include forms MBR-1, MBR-1 Supplement, MBR-1-01 - MBR-1-04, MBR-1-B, MBR-1-D-1 and MBR-1-3, and additional forms in the Budget Request Package.	Hold copy one (1) year; then destroy.	1/19/2017

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Buildings, Construction, and Facilities

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G227	Project Files, Local Schools (public schools and IHL)	State oversight and review of new construction and renovation to existing buildings of locally operated public schools. May include construction documents, scope of work, public notice, advertising for bids, specifications, correspondence, MDE review documents, performance bonds, insurance records, mechanics liens, change orders, contracts, payments, MDE Board Minute sections for approval or cancellation, closing documents, final inspections, and related files.	Hold five (5) years after project has been completed or cancelled, then dispose. Local school districts must retain records as directed by the Local Government Office retention schedules.	10/24/2024
G228	Project Files, State-Owned Facilities	New construction and renovation to existing buildings of Mississippi government. May include construction documents, schematics, scope of work, public notices, advertisements for bids, specifications, correspondence, review documents, performance bonds, insurance records, mechanics liens, change orders, contracts, payments, DFA approval or cancellation documents, closing documents, pay vouchers, final inspections, and related files.	Hold five (5) years after project has been completed or cancelled, then dispose of routine business records. Property owner will retain one (1) copy of the as-built plans and specifications for the life of the building, and transfer one (1) copy of each as-built plans and specifications to State Archives. IHLs and other state institutions with property not managed by DFA will retain copies for the life of the building.	10/24/2024
G229	Project Files, State-owned Interstates, Roads & Bridges	Includes plans, specifications, reports, contracts, documents and correspondence for the construction of interstates, bridges, railroad construction and crossing signals, and permits for driveway construction.	Hold permanently.	10/24/2024

G230	Project Files, Non-State Owned Roads and Bridges	Includes project files, correspondence, county engineer's diaries, construction estimates, contracts, payments, test and material reports, and testing charges used to aid counties in the construction and maintenance of secondary roads and bridges.	Hold permanently at the central office. Once inactive, a copy will be sent to the district office for permanent retention.	10/24/2024
G231	Project Files, Index Files	This series may record the projects for reference in a register.	Hold permanently.	10/24/2024
G232	Inventory Files	Includes photographs and drawings of bridges and railroads in the state.	Transfer to Archives.	10/24/2024

Family Support Services

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G187	Adoption and Foster Care Placement Files	Includes Interstate Compact on Placement of Children (Adoption & Foster Care), County Adoption Case Files, and related files.	Hold one-hundred twenty-five years (125), then dispose. Paper must be held in a climate controlled area, and electronic records must be duplicated off-site.	7/18/2024
G188	Child Support Files	This series includes parent locator case files, administrative files, child support fiscal records, enforcement and attorney's reports, and legal and related files.	Hold five (5) years, then dispose. Fiscal records must have been released three (3) years prior to disposal.	7/18/2024
G190	Client Lists	This series includes lists of clients, beneficiaries, or others served by programs of the agency. The lists are used internally to evaluate programs and the numbers and programmatic assignments. This may include daily, weekly, monthly, quarterly, and annual lists.	Hold until superseded, then dispose.	7/18/2024
G191	Client Participation	Includes applications, active, deceased, discharged, eligibility determinations, case mix, buy-in, pre-admission, plan of care, desk review, and related files. These files are for individuals to participate as Medicaid, Human Services, and Rehabilitative Services beneficiaries, clients, and recipients for which the agency may pay another entity for services, treatment, or care received under their program.	Hold five (5) years after case is closed, denied, or individual is deceased, and all state and federal audits have been released three years. Delete and dispose of all paper and electronic records.	7/18/2024

G192	Cost Reports	Rural Health Clinics, Nursing Home, Home Health Agency, Long-term Care and Federal Qualified Health Clinic Cost Reports, hospital reimbursement non-prospective payment system.	Hold five (5) years after settlement, then dispose.	7/18/2024
G193	Federal Communications, General	Official communications to include memos, bulletins, correspondence, instructions, policies, and procedures.	Hold until superseded, then dispose.	7/18/2024
G194	Federal Communications, Inspector General	Sanction Letters	Hold six (6) years after final resolution and release, then dispose.	7/18/2024
G195	Federal Reports	This includes information and work papers used to compile, complete, and submit reports to the federal government related to agency programs as required.	Hold six (6) years after acceptance, then dispose.	7/18/2024
G196	Programmatic Audits and Investigations	Audits and financial review by the agency of providers, clients, or programs to ensure compliance with programmatic requirements to include provider, client, and reported abuse.	Hold five (5) years after closure, then dispose.	7/18/2024
G197	Provider Participation	Application, Provider Enrollment, Certification & Transmittal, Prior Authorizations, Pharmacy, out-of-state pharmacy and providers, provider audits, medical licensure notices, provider inspections, case mix, and related files.	Hold five (5) years after denied or inactive, then dispose.	7/18/2024

G198	Programmatic Reports	This series may include weekly, monthly, quarterly, and annual reports on client case work, closures, and other reports to show aggregated or individual clients added or removed, costs per recipient/benefit type from program assistance or benefits.	Hold annually compiled information five (5) years, then dispose.	7/18/2024
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Healthcare

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G27	Privacy Complaint	Federal Regulations mandate those agencies who are required to comply with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) to maintain documents related to complaints of alleged privacy violations. These records generally include forms and correspondence. This series is subject to audit by the Centers for Medicare and Medicaid Services (CMS) and/or the Office for Civil Rights.	Hold in current file area one (1) year after the final agency disposition of the allegation. Records to be transferred to State Records Center for an additional five (5) years, then destroyed.	4/19/2007
G28	Notice of Privacy Practices	Federal Regulations mandate those agencies who are required to comply with the Health Insurance Portability and Accountability Act of 1996 (HIPAA) to create and provide access to the Notice of Privacy Practices, which outlines the rights, responsibilities, and directions relating to privacy concerns. These records generally include the actual Notice, various available Notice formats (paper, electronic, HTML), and a list of individuals to whom the Notice was sent. This series is subject to audit by the Centers for Medicare and Medicaid Services (CMS) and/or the Office for Civil Rights.	Hold in current file area one (1) year after the effective date of the Notice or availability to the recipient. All "official" versions of the Notice shall be retained permanently by the creating agency, and any lists of recipients may be sent to the State Records Center for an additional 5 years, then destroy.	4/19/2007

G148	Patient Billing	This series consists of financial records that include accounts payable and receivable files related to patient billing for services or treatment. These may include daily register totals, monthly reports, receipts, EOB's, insurance payments, patient payments, charge-offs, collections, correspondence, and related files.	Hold three (3) years after final payment or write-off, and release of audit, then dispose.	10/28/2021
G149	Hospital Patient Records, Adults (4)	This series consists of records of adult patients of sound mind, which are created or received by a state hospital and may include charts, notes, diagnoses, treatment plan, lab results, and related files.	Hold files ten (10) years after date of discharge, then dispose.	10/28/2021
G150	Hospital Patient Records, Mental Health	This series consists of records of adult and minor patients under a mental health disability, which are created or received by a state mental health hospital and may include charts, notes, diagnoses, treatment plan, lab results, and related files.	Hold files twenty-eight (28) years after date of discharge, then dispose.	10/28/2021
G151	Hospital Patient Records, Minors	This series includes minor patient records held by a state hospital that may include charts, notes, diagnoses, treatment plan, lab results, and related files.	Hold files ten (10) years, then dispose.	10/28/2021
G152	Hospital Radiological Patient Records	This series includes radiological reports, printouts, films, scans, and other imaging records used to diagnose illness, injury, or disease in a hospital patient.	Hold five (5) years provided radiological report is held in the patient files, then dispose.	10/28/2021

G153	Patient Records, Adults	This series includes records of adult patients of sound mind, which are created or received by non-hospital family practices, clinics, nursing homes, or other state-operated practices, and may include charts, notes, diagnoses, treatment plans, lab results, and related files.	Hold files ten (10) years after patient was last seen, then dispose.	10/28/2021
G154	Patient Records, Minors	This series includes records of minor patients of sound mind, which are created or received by non-hospital family practices, clinics, or other state operated practices and may include charts, notes, diagnoses, treatment plans, lab results, and related files.	Hold files ten (10) years, then dispose.	10/28/2021
G155	Medication Acquisition Records	This series includes records to document the purchase of medications at state-operated pharmacies. Included may be invoices, payment vouchers, correspondence, shipping and receiving, and reports related to the order and purchase of medication. The Centers for Medicaid and Medicaid Services (CMS) may require longer retention for participation in the program.	Hold Three (3) years, then dispose. Audit must have been released three (3) years prior to disposal.	7/21/2022

<p>G156</p>	<p>Medication Control Records, Subject to CMS Rules</p>	<p>This series includes records to document the inventory, dispensing, destruction, or return of medications of a state-operated pharmacies subject to the Centers for Medicare and Medicaid (CMS) regulations. This may include prescription number, date of initial dispensing, name and address of patient, prescribers name and DEA registration number, dosage, error rate, health disclosure, and other information as may be required by CMS, FDA, DEA, or the Mississippi Board of Pharmacy regulations.</p>	<p>Hold ten (10) years, then dispose.</p>	<p>7/21/2022</p>
<p>G157</p>	<p>Medication Control Records</p>	<p>This series includes records to document the inventory, dispensing, destruction, or return of medications of a state-operated pharmacies not subject to the Centers for Medicare and Medicaid (CMS) regulations. This may include prescription number, date of initial dispensing, name and address of patient, prescribers name and DEA registration number, dosage, error rate, health disclosure, and other information as may be required by CMS, FDA, DEA, or the Mississippi Board of Pharmacy regulations.</p>	<p>Hold six (6) years, then dispose.</p>	<p>7/21/2022</p>

Inspection Records

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G233	Health, Fire, and Safety Facility Inspections	Inspections of jails, penitentiaries, community work centers, schools, casinos, colleges, universities, and daycare facilities.	Hold five (5) years, then transfer to Archives.	10/24/2024
G234	Environmental Inspections	Conducted by Environmental Quality of facilities.	Hold ten (10) years after close of facility, then dispose.	10/24/2024
G235	Agency Copies	Includes a copy of the official inspection to be held five (5) years after re-inspection or accreditation retention requirements, then dispose.	Hold five (5) years after most recent inspection, then dispose.	10/24/2024

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Law Enforcement

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G168	Accident Reports	This series includes dates and descriptions of accidents, people involved, climates, and descriptions of vehicles/vessels involved where the accident occurred, and related files.	Hold three (3) years after accident report is completed, then dispose.	4/20/2023
G169	Arrest Records, Reports, and Logs - Felonies	This series consists of files related to felony arrests. Included is documentation of the arrest of an individual by a state law enforcement agency.	Hold felony records, or crimes for which there is no statute of limitations, seventy-five (75) years; then dispose.	4/20/2023
G170	Arrest Records, Reports, and Logs - Non-Felonies	This series consists of files related to non-felony arrests. Included is documentation of the arrest of an individual by a state law enforcement agency.	Hold non-felony records five (5) years after the final disposition of the case, then dispose.	4/20/2023
G171	Dispatch Logs	This series consists of logs maintained by the dispatch unit which contain information regarding time, location, units dispatched in an incident, and other information.	Hold three (3) years, then dispose. Logs involved in litigation, by or against the state entity, are disposed of five (5) years after final disposition of the case.	4/20/2023
G172	Dispatch Recordings	This series consists of files related to dispatch tape recordings. Included are tape or digital recordings of calls received by dispatchers and radio communications between law enforcement personnel.	Hold tape or digital recording thirty (30) days, then dispose. Recordings involved in litigation are disposed of five (5) years after final disposition of the case. Hold recordings of felonies, or crimes for which there is no statute of limitations seventy-five (75) years, then dispose.	4/20/2023

G173	Expungements	This series consists of files related to expungements. Included are various law enforcement records (offense reports, arrest reports, and all other records stipulated in a court order).	Hold files until case is finalized, then dispose.	4/20/2023
G174	Capital Offense Reports	This series consists of files related to capital offense reports. Included are cases gathered by the investigating law enforcement officer at an incident. They are common in form and format and detail all information concerning the reported incidents. Additional information is often contained in a supplemental report, which is included as a part of this series.	Hold files seven (7) years, then dispose.	4/20/2023
G175	Non-Capital Offense Reports	This series consists of files related to non-capital offense reports. Included are cases gathered by the investigating law enforcement officer at an incident. They are common in form and format and detail all information of reported incidents. Additional information is often contained in a supplemental report, which is included as a part of this series.	Hold four (4) years, then dispose.	4/20/2023
G176	Tickets - Violations of Law	This series include traffic citations and tickets for violation of laws where issued by a state law enforcement officer.	Hold three (3) years after resolution and audit, then dispose.	4/20/2023
G177	Training Records, General	This series documents training activity provided to law enforcement personnel. Information may include description of training activates, sign-in sheets, and general information regarding the training provided.	Hold ten (10) years, then dispose.	4/20/2023
G178	Training Records, Individual	This series documents all training received by individuals employed by a state law enforcement agency.	Hold three (3) years following separation of employment.	4/20/2023

G180	Video/Audio Recordings - Mobile Units, Non-Evidentiary	Non-evidentiary recordings created by mobile units, including both in-car and body-worn cameras.	Hold thirty (30) days, then dispose.	4/20/2023
G182	Video/Audio Recordings - Stationary Cameras, Non-Evidentiary	Created by fixed, stationary cameras used for surveillance purposes in and around public buildings.	Hold thirty (30) days, then dispose.	4/20/2023

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Legal

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G130	Civil Litigation Case File	This series consists of files related to civil litigation by or against a state agency, board or commission and may include correspondence, attorney work product, pleadings, transcripts, evidence, briefs, court orders, and related material.	Hold five (5) years after case and all associated appeals are closed, then dispose. All settlements must have been satisfied prior to disposal.	4/15/2021
G158	Contracts - Federally or other funded	Includes bid packets for winning proposals, progress reports, timesheets, documentation of accepted deliverables, amendments, as-built drawings, change-orders, correspondence, corrective actions, time-delay files, close-out documentation, purchase orders, invoices, requisitions for payment, evidence of payment, directives regarding the contractors' responsibility for recordkeeping, and related materials.	Hold five (5) years after close of contract and final payment, then dispose. Audit must have been released three (3) years prior to disposal.	4/20/2023

G159	Contracts - State funded	Includes bid packets for winning proposals, progress reports, timesheets, documentation of accepted deliverables, amendments, as-built drawings, change-orders, correspondence, corrective actions, time-delay files, close-out documentation, purchase orders, invoices, requisitions for payment, evidence of payment, directives regarding the contractors' responsibility for recordkeeping, and related materials.	Hold three (3) years after close of contract and final payment, then dispose. Audit must have been released three (3) years prior to disposal.	4/20/2023
G160	Contracts - Healthcare Services	Includes bid packets for winning proposals to provide professional licensed healthcare services to individuals, progress reports, timesheets, documentation of accepted deliverables, amendments, change-orders, correspondence, corrective actions, time-delay files, close-out documentation, purchase orders, invoices, requisitions for payment, evidence of payment, Business Associate Agreements, directives regarding the contractors' responsibility for recordkeeping, and related materials.	Hold six (6) years after close of contract and final payment, then dispose.	4/20/2023
G161	Affiliation Agreements	This series consists of documentation of agreements with external entities (e.g. companies, hospitals, clinics, pharmacies, etc.) that accept students for practical service connected to a degree program. Included are signed agreements, correspondence, and related records of negotiations contributing to the relationship and with the external entity.	Hold five (5) years from end of agreement, then dispose.	4/20/2023

G162	Reciprocal Agreements	Documents relating to agreements between states and licensing of agents.	Hold until no longer applicable, then dispose.	4/20/2023
G163	Lease, Real Property	This includes lease documents for state agencies to lease real property, or oil, gas, or mineral rights to or from another entity. Files may include the lease agreement, addendums, correspondence, easements, deeds, plat maps, building floor plans and related items.	Hold three (3) years after expiration of the lease, then dispose.	4/20/2023
G164	Lease, Equipment	This includes lease documents for state agencies to lease equipment. This may include office equipment, implements, tools, or technology that does not go through the competitive bid process.	Hold three (3) years after expiration of the lease, then dispose.	4/20/2023

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Licensure, Permits, and Certifications

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G140	Directory	This series includes annual directories or listings of all active licensed individuals and business entities. They may include name, street address, city, state and zip code, telephone number, license type, date approved for license, date license renewed, and related information that may be made publically available.	Annually transfer directory to the State Archives. State agency to hold five (5) years, then dispose.	10/28/2021
G141	License Files	This series includes files of active licensees, which may include applications, personal data, diplomas, continuing education, correspondence, renewal records, criminal background check, and approval, renewal, or reinstatement to practice in Mississippi.	Hold five (5) years after license becomes void, then dispose.	10/28/2021
G142	Denied or Incomplete Licensee Files	This series includes applications, personal data, diplomas, continuing education, correspondence, and approval to practice in Mississippi for individuals who were denied either due to agency policy or because not all information required to process the application was provided.	Hold two (2) years after denial or submission deadline, then dispose.	10/28/2021
G143	Permits & Certification	This series consists of files related to permits and certifications to perform an activity where such permit or certification is required by a state agency, board or commission.	Hold four (4) years after expiration, then dispose.	10/28/2021

G144	Examinations	The series includes training and examination materials such as answer sheets, test booklets, transcripts, scratch paper, exam instructions, score reports, sign-in sheets, requester logs, lists of examinees, master exam copies and answer keys.	Hold one (1) year, then dispose.	10/28/2021
G145	Investigatory - Discipline	This series includes complaints of a licensee where disciplinary action is taken and may consist of letters; reports; patient records; hearing reports; consent orders; administrative orders; orders of continuance; agreements/contracts; search warrants; educational materials; toxicology reports; tax and insurance records; after-care; AA or NA attendance verification; photographs; and related files.	Hold ten (10) years after close of investigation, then dispose. Final orders to be entered in the minutes of the Board.	10/28/2021
G146	Investigatory - without discipline	This series includes complaints of a licensee where no disciplinary action is taken and may consist of letters; reports; patient records; consent orders; administrative orders; orders of continuance; agreements/contracts; search warrants; educational materials; toxicology reports; tax and insurance records; after-care; AA or NA attendance verification; photographs; and related files.	Hold five (5) years after close of investigation, then dispose. Final orders to be entered in the minutes of the Board.	10/28/2021
G147	Programmatic Correspondence	This series includes correspondence regarding requests for verification of licensure status, certification to other states' registers, and related information not held in the licensee and permit and certification files.	Hold one (1) year, then dispose.	10/28/2021

Payroll

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G77	Tax Records of Employees	This series includes Form W-2, description and purpose of payments, name, address, social security number, dates of payment, and any required noticed.	DFA to hold five (5) years from the date the W2 is sent, then dispose. Audit must have been released three (3) years prior to disposal.	4/20/2017
G78	Tax Records of Contractors	This series includes Forms W-9, 1099-MISC, 945, description and purpose of payments, notices regarding backup withholding, name, address, taxpayer ID, and dates of payment.	DFA and state agencies to hold five (5) years, then dispose. Audit must have been released three (3) years prior to disposal.	4/20/2017
G133	DFA Master Payroll	Basic earnings records, wage-rate tables, additions/deductions from wages, registers, timesheets & cards, and related material.	DFA to hold master records in electronic system seven (7) years, then delete. A DFA system fiscal audit must have been released three (3) years prior to disposal.	7/15/2021
G134	DFA Payroll Reports	Monthly reports that provide payroll data	DFA will hold payroll reports seventy-five (75) years, then dispose. Audit must have been released three (3) years.	7/15/2021
G135	PERS Wage Reports	Wage reports	PERS will hold wages reported by employer agencies permanently seven (7) years after the death for each member and ensure security and migration of digital formats.	7/15/2021
G136	Agency Payroll Records	Basic earnings records, wage-rate tables, additions/deductions from wages, registers, reports, timesheets & cards, and related material.	State agencies will hold born digital payroll records seven (7) years, then delete. Paper records will be held two (2) years, then may be transferred to the state records center for five (5) years, then disposed. Audit must have been released three (3) years.	7/15/2021

G137	Timesheets and Time Cards - State funded employees	This series includes the timesheets and time cards of individuals working for a state agency.	Agencies whose employees are funded using state dollars will hold records three (3) years, then dispose. Audit must have been released three (3) years prior to disposal. Copies of these files held by an agency office or the employee can be disposed of after one (1) year.	7/15/2021
G138	Timesheets and Time Cards - Federal or other funded employees	This series includes the timesheets and time cards of individuals working for a state agency.	Agencies whose employees are funded through federal funds or private grants hold files seven (7) years, then dispose. Audit must have been released three (3) years prior to disposal.	7/15/2021

Personnel Records

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G14	Personnel Files - Active (Subject to Personnel Board)	Included are: Application for employment, personnel data summary, attendance records, personnel actions, performance evaluations, cumulative leave records, discipline record, letters of commendation, payroll deduction data, bond, training records, etc.	Hold original or authenticated reproduction until employment is separated; then transfer to Personnel Files - Separated Employees. Active personnel files may be routinely purged of the following material three (3) years after receipt: Request for Leave, Cumulative Leave Records, Attendance Records and Performance Evaluations.	4/6/1989
G15	Personnel Files - Separated Employees (Subject to Personnel Board)	Included are: Application for employment, personnel data summary, attendance record, personnel actions, performance evaluations, cumulative leave records, discipline record, letters of commendation, payroll deduction data, bond, training records, etc.	Original or authenticated reproduction of Personnel Files may be destroyed after 6 years PROVIDED personnel reference data is maintained by agency for all employment activity prior to 1978. The information retained must include employee name, social security number, date of birth, race, sex, job titles, dates held, salary history and termination date. This information is maintained by the State Personnel Board for personnel actions after 1977. Personnel reference information should be retained for a period of fifty-five years. Personnel summary data may be retained in any format and media selected by the agency. NOTE: Personnel files for separated employees may be transferred to the State Records Center for storage until the expiration of the six year period. All files transferred to the State Records Center MUST contain certification from the agency that personnel summary data has been prepared for all files dated prior to 1978.	4/6/1989

G16	General Administrative Files - Personnel Office	Included are: Certificate of eligibility, job applications (unsuccessful), job announcements, employee count printouts, requests for certificate of eligibility, performance evaluations due, manpower project and occupational analysis.	Hold original or authenticated reproduction three (3) years; then destroy.	1/18/2018
G20	Personnel Files - Active (Not Subject to Personnel Board)	Included are: Application for employment, personnel data summary, attendance records, personnel actions, performance evaluations, cumulative leave records, discipline record, letters of commendation, payroll deduction data, bond, training records, etc.	Hold original or authenticated reproduction until employee is separated; then transfer to PERSONNEL FILE - SEPARATED EMPLOYEES. Active personnel files may be routinely purged of the following material three (3) years after receipt: Request for Leave, Cumulative Leave Records, Attendance Records and Performance Evaluations.	6/28/1989
G21	Personnel Files - Separated Employees (Not Subject to Personnel Board)	Included are: Application for employment, personnel data summary, attendance records, personnel actions, performance evaluations, cumulative leave records, discipline records, letters of commendation, notice of separation/resignation, payroll deduction records, bond, training records, other records relating to an individual's employment.	Original or authenticated reproduction of Personnel Files may be destroyed after six (6) years PROVIDED personnel reference data is maintained by agency for all employment activity. The information retained must include employee name, social security number, date of birth, race, sex, job titles, dates held, salary history, and termination date. Personnel reference information should be retained for a period of fifty-five years. Personnel summary data may be retained in any format and media selected by the agency. NOTE: Personnel files for separated employees may be transferred to the State Records Center for storage until the expiration of the six (6) year period. All files transferred to the State Records Center MUST contain certification from the agency that a personnel summary data has been prepared for all files.	6/28/1989

G65	EEOC Case Files	This series includes the statement of position, internal investigation material, copy of personnel file, correspondence, witness interviews, copies of applicable personnel policies, and notices from the Equal Employment Opportunity Commission.	Hold file on (1) year after the Notice of Right to Sue has been issued by the EEOC; then dispose if no litigation has begun. If a Letter of Determination was issued by the EEOC, or the complainant filed suit; then hold file three (3) years after conclusion of conciliation or litigation; then dispose. Audit must have been released three (3) years after financial settlement. 29 CFR 1602	1/19/2017
G67	Request for Leave	Employee's personal and medical leave	Hold original or authenticated reproduction four (4) years; then destroy.	1/19/2017
G68	Cumulative Leave Records	Employee's leave accrued, taken and balance.	Hold original or authenticated reproduction four (4) years; then destroy.	1/19/2017
G79	I-9 Forms	This series is filed separately from the regular personnel files and agencies must be able to provide access to the Department of Justice or Department of Labor within three (3) days of a request.	Hold three (3) years after date of hire or one (1) year after termination, whichever is greater, then dispose.	4/20/2017
G80	Health Plan Benefits	This series includes information about the health benefits available to all state employees.	Office of Insurance to hold information related to health benefits and programs seven (7) years after modification or termination of plan benefits, then dispose. State Agencies hold state employee health benefits plan information three (3) years after the plan is amended or superseded, then dispose.	4/20/2017
G81	Supplemental Health Plan Benefits	This series include information about supplemental benefits available to state employees for a given agency.	Agencies will hold supplemental health benefits plan information six (6) years after the plan is amended or superseded, then dispose.	4/20/2017

G82	Drug Test Records	This series includes the testing results of employees from drug tests administered as a condition of employment.	Hold drug test records one (1) year from receipt of test results, then dispose. DOT positions in aviation, trucking, railroads, mass transit and pipelines must hold records five (5) years from receipt of test results, then dispose. If test resulted in adverse action against an employee, hold the records five (5) years after conclusion of final action.	4/20/2017
G83	Americans with Disabilities Act documentation	This series includes all documents received from, or used to make a decision for compliance with the Americans with Disabilities Act. The Equal Employment Opportunity Commission, Department of Transportation, Federal Communications Commission, and Department of Justice all enforce portions of the Act.	Hold all documents received from an employee, or created as part of the decision making process, one (1) year after receipt of the records or personnel action is finalized, then dispose.	4/20/2017
G84	Age Discrimination in Employment Act	This series includes documents received or used in the decision making process related to age discrimination in employment. The Equal Employment Opportunity Commission regulates and enforces this Act.	Hold all documents received from an employee, or created as part of the decision making process, one (1) years after receipt of the records or personnel action is finalized, then dispose. All payroll records are held according to the payroll retention schedules.	4/20/2017
G85	Applicant Selection Process Records	This series include certificates of eligibles, applications, resumes, cover letters, interview notes, and other documents presented for a position of employment.	Agencies will hold two (2) years after the final decision is made on the position for which the information was received. Supervisors and selection committee members to hold copies one (1) year after completion of interview and decision process, then dispose.	4/20/2017

G86	Safety Data (Toxic Substance Exposure)	This series includes files related to the safety of state employees and exposure of hazardous or toxic substances. This includes Material Safety Data Sheet, medical exams, reports, and communications.	Hold all safety and health records related to exposure thirty (30) years after the individual is no longer employed by the state, then dispose.	4/20/2017
G87	Worker's Compensation Files	This series includes files related to accident reports, potential claims, and actual claims filed for Worker's Compensation Coverage due to injury or illness related to employment.	Supervisors hold all files until they can be transferred into the agencies Official Files. The Official files are held for reports of injury in which no claim for coverage was filed for two (2) years, then dispose. Hold all records related to Worker's Compensation coverage or benefits paid for seven (7) years after last payment is made.	4/20/2017
G91	Personal Service Contract Files	Documents related to and including personal service contracts, analysis, requests for approval, advertisements, invitations to bid, vendor bids, awards, contracts and all other records as required by the Personal Service Contract Review Board for the administration of personal service contracts.	Hold three (3) years after final payment and agreed settlement, then dispose. Audit must have been released three (3) years prior to disposal.	7/20/2017
G107	Garnishments	This series includes court documents of service to agency, calculation of garnishable wages, correspondence, release of garnishment, statement of satisfaction, and other files.	Hold three (3) years after complete satisfaction of judgement, court order, or after audit; whichever is longer, then dispose.	1/18/2018
G201	Time Management	This series includes documentation of case management, staff assignment and time study reports to determine the amount of time involved in projects by staff/contractors, and to allocate costs for future expenditures relating to the number of individuals involved.	Hold one (1) year, then dispose.	7/18/2024

G108	Unemployment Records	This series includes notices and responses to claims, determinations, notices of hearings, and decisions, unemployment insurance payment reports, and other files.	Hold five (5) years; then dispose. Audit must have been released three (3) years prior to disposal.	1/18/2018
G109	Pre-Employment Background Investigation	This series contains information related to pre-employment background investigations to include copies of employment applications, release forms, credit reports, driver's licenses, transcripts, social security numbers, professional licenses or certifications, verification of education and licensure, sex offenders registry, personal and professional references, fingerprint applications, lie-detector results, blood or urine test results, correspondence, criminal, driving, education, court, and military records.	Hold one (1) year from conclusion of investigation; then dispose. If investigation resulted in the applicant not being hired, hold the records five (5) years after conclusion of final action; then dispose. Drug test records are held according to schedule G82	1/18/2018
G110	During Employment Background Investigation	This series may include copies of drivers' licenses, copies of professional licenses or certifications, release forms, personal and employment references, education records, employment applications, fingerprint applications, lie-detector results, blood or urine test results, correspondence, and other files.	Hold one (1) year from conclusion of investigation; then dispose. If investigation resulted in adverse action against an employee, hold five (5) years after conclusion of final action; then dispose. Drug test records are held according to schedule G82.	1/18/2018

Procurement

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G165	Procurement, Competitive Bid	This series includes documents involved in the competitive bid process for contracts, requests for proposals, requests for bids, or related. These may include advertisements, drawings and specifications, scoring documents, budgets, recap and tabulation sheets, bidder packets or applications, award and rejection letters, and requests for copies of proposals or submitter lists.	Hold one (1) year after award of contract and conclusion of any challenges, then dispose of all documents specific to the unsuccessful bidders. All other information will be incorporated into the awarded contract.	4/20/2023
G166	Procurement - State Contract, Federally Funded	Documents relating to procurement of goods and services on state contract. Included are copies of the contract and supporting documentation.	Hold five (5) years from the end of the fiscal year purchased, then dispose. Audit must have been released three (3) years prior to disposal.	4/20/2023
G167	Procurement - State Contract, State Funded	Documents relating to procurement of goods and services on state contract. Included are copies of the contract and supporting documentation.	Hold three (3) years from the end of the fiscal year purchased, then dispose. Audit must have been released three (3) years prior to disposal.	4/20/2023

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Property

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G116	Fixed Assets	This series consists of records related to specific assets as outlined by the Office of the State Auditor. Documentation may include additions, deletions, property inventories, affidavits of lost or stolen property, assignments of property, authority to dispose documents, hand receipts, logs, reports, transfers to surplus, duplicate purchasing records, court orders, equipment manuals, and related files.	Hold three (3) years after asset has been removed from inventory, then dispose. Audit must have been released three (3) years prior to disposal.	10/22/2020

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Public Relations

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G53	Press Releases	This series consists of official public releases of the agency. These records may include, but are not limited to, news releases, prepared statements, and public service announcements.	Annually transfer one copy to State Archives.	1/22/2009
G54	Public Relations Working Files	This series consists of materials created in the preparation of press releases. Included are rough drafts, design and layout documents, and printing information.	Maintain in current files area three (3) years, then destroy.	1/22/2009
G55	Agency Publications	This series consists of publications produced for public distribution. Includes, but is not limited to, books, reports, studies, pamphlets, posters, leaflets, brochures, magazines, and maps.	Each agency shall provide the MS. Library Commission with copies of each publication in compliance with Section 25-51-1 et. seq. of the Mississippi Code of 1972, as amended; and one copy to the State Archives. The State Archives can accept a copy in native format.	1/22/2009
G56	History Files: Agency	This series consists of material that documents particularly significant accomplishments and events in the history of an agency. Although scheduled for destruction under another schedule, it may be considered because of its exceptional content. Included, but not limited to articles, notes and program documentation, narratives, photographs, recordings, and scrapbooks. This may be print, audio, electronic, or audio/visual material.	Contact State Archives for archival review.	1/22/2009

G57	Invitations and Programs	This series consists of invitations to public agency events and programs printed for public agency events.	Annually transfer one copy to State Archives.	1/22/2009
G58	Speeches (Elected Officials and Executive Level)	This series consists of official speeches given by an agency director, deputy director, or elected state official. Included are final versions or final mark-up versions of speeches.	Annually transfer one copy to State Archives.	1/22/2009
G63	Newsletters, Bulletins & Brochures	Agency publications that provide information about activities, programs or services of an agency, board or commission and any of its subunits.	Transfer original format, whether paper or electronic, or agreed upon digitized copy to Archives at the end of each fiscal year.	10/20/2011
G64	Newsletter Support Files	This series includes working papers, mailing lists and other files used to create the final newsletter.	Hold support files one (1) year; then dispose.	10/20/2011

State Plan

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G29	State Plan	<p>These records document agency actions as they relate to their respective State Plan documents, which are required as part of participating in federal programs. This series includes the actual state plan on file, background information, forms, correspondence, reference to or inclusion of Administrative Procedures Act (APA) filings, memorandums, economic impact statements, historical state plan documents, and miscellaneous supporting materials.</p>	<p>The official agency copy must be held permanently. If previously held paper documents are electronically imaged, the image must be verified by the agency and may become the official record for this series for permanent retention. Once authenticated, the original paper documents may be destroyed. The form and format of electronic images must not restrict the ability of the public to obtain copies as outlined in applicable laws.</p>	4/19/2007

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Training Records

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G113	Annual Training Plans	This series consists of the annual training plans with details about current and future plans for an agency. The training plans are developed, evaluated, and updated based on annual assessments that identify current job related needs. The plans also provide guidance toward comprehensive job related training to all staff.	Hold five (5) years; then dispose.	1/18/2018
G202	Training Events	Sign-in sheets, announcements, and correspondence. Correspondence and invoices for training provided by a third party must follow Procurement retention schedules.	Hold three (3) years, then dispose.	7/18/2024
G203	Training Master Files	Development files to include curriculum, presentation material, hand-outs, lecture notes or information compiled for the presentation of the training. Agency should obtain a copy from contractors or vendors who are providing the training for the benefit of the agency.	Hold until superseded, then dispose.	7/18/2024

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Vehicle Records

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
G92	Passenger Vehicle Purchase, Lease, Rent or Acquire Approval Files	Includes documents of vehicle choice justification, internal and BFM approvals, VR-1, CR-1 and grant agreement if applicable, Commuter Mileage Calculator, sales agreement/contract, vehicle replacement justification, and other files as required to obtain a licensed passenger vehicle.	Hold files three (3) years, then dispose. Audit must have been released three (3) years prior to disposal.	7/20/2017
G93	Passenger Vehicle Purchase, Lease, Rent or Acquire Ownership/Use Files	Includes documents related to the vehicle warranty, window sticker, owner's manuals, and other documents received when taking possession of a passenger vehicle.	Hold files for the life of the vehicle, then transfer to the new owner upon disposition of vehicle.	7/20/2017
G94	Passenger Vehicle Maintenance and Care Files	Includes agency policy for proper maintenance, tracking of maintenance costs, routine and additional maintenance/repair information, and warranty tracking system.	Hold files for the life of the vehicle, then transfer to the new owner upon disposition of vehicle.	7/20/2017
G95	Passenger Vehicle Monthly and Annual Inspection Files	Monthly and annual inspection files completed by agency staff and submitted to the agency's fleet manager. Includes notes on vehicle condition and necessary repairs.	Disposition: Hold one (1) year, then dispose.	7/20/2017
G96	Passenger Vehicle Fuel and Mileage Logs	Required forms completed by agency staff to document daily use and fuel purchase for an agency vehicle.	Hold three (3) years after audit, then dispose.	7/20/2017

G97	Fuel Card Files	Files held by each agency's fleet manager which document fuel card assignment, use, billing, invoices/receipts, and related material.	Hold three (3) years after audit, then dispose.	7/20/2017
G98	Passenger Vehicle Operating Records	Files of authorized users of an agency's vehicles, which include the Vehicle Use Agreement, copy of driver's license, driving record report, copy of fleet policies and procedures. Files are updated annually.	Hold one (1) year, then dispose.	7/20/2017
G99	Passenger Vehicle Misuse Incident Report	Forms and files which document the misuse of an agency's vehicle. This series may include complaints, notes, investigative material, photographs, and DFA approved forms.	Hold one (1) year after resolution of incident, then dispose. If the incident resulted in personnel action against the employee or operator of the vehicle, transfer the file to the personnel file.	7/20/2017