

- ❖ **After Close** (or terminated, completed, expired, or settled): The record is related to a function or activity with a finite closure date.
- ❖ **Administratively Valuable:** The immediate purpose for which the record was created has been fulfilled and subsequent need for the record to conduct the operations of the agency, if any has been satisfied.
- ❖ **Calendar Year End:** December 31
- ❖ **Fiscal Year End:** August 31
- ❖ **School Year End:** June 31
- ❖ **PERMANENT:** A record that possesses enduring legal, fiscal, or administrative value and must be preserved permanently by the agency.
- ❖ **Until Superseded:** The record is replaced by an updated version. If a record subject to this retention period is discontinued or is no longer required by law, the date of the supersession is the date the decision to discontinue the record is made or the law takes effect. If the record related to an employee, the date of supersession is the date of termination or the last date the record is needed with reference to the employee, as applicable. For example, an authorization for direct deposit would be superseded on the date of the last deposit is made under the authorization.
- ❖ **Record Copy:** the document which is kept on file as an original or official record for the total retention period. It is distinct from a “working” or convenience” copy, which is a duplicate used for reference purposes.
 - **Caution:** *Care must be taken by records management officers in determining if duplicate records are, indeed, convenience copies or if two or more copies of the same document must be considered record copies. It is very possible for the same document to be present in two or more units of a state agency and be the record copy in each unit if it serves a different function in of those units.*
- ❖ **Record Series:** A group of identical or related records with the same function and the same retention period that is evaluated as a unit for retention scheduling purposes.
- ❖ **Retention Period:** The amount of time a records series **must** be retained before destruction or archival preservation.
- ❖ **Retention Notes:** OTHER SCHEDULES – This schedule should be used by public school districts, regional educational service centers, and other local education agencies (as defined on page 2) in conjunction with Local Schedule GR (Records Common to All Governments) and Local Schedule TX (Records of Property Taxation). In particular, many records maintained by public school districts are includable among the general administrative, financial, and personnel record series in Local Schedule GR, especially those relating to grant allocations, funding, and reporting. In any instances of conflict between retention periods established in this schedule and in Local Schedules GR or TX, the retention periods in this schedule shall prevail.