



This change log notes all substantial changes from the 2019 to the 2021 version of the *General Records Schedule: Local Government Agencies*. For simplicity, wordsmithing, typographical corrections, pointers to other records series, and modifications to citations have not been tracked. Substantive changes are listed in the left-hand column. In the center column are the titles of new records series that have been added to the schedule. In the right-hand column are records series that have been discontinued because the records are no longer created or received by local government agencies (or in cases where these are listed in the same row as a series that was changed, these records have been combined into that broader records series). The index to the schedule also includes pointers where one series was subsumed into another.

Please note that what had been the Personnel Records standard (Standard 6) has been retitled as the Human Resources standard; alphabetization means this is now Standard 4 (and IT Records and Legal Records have been shifted to standards 5 and 6 respectively).

This updated schedule also includes in the appendix a section entitled “Related Records Series Found in Local Agency Program Schedules,” which identifies records series within the Local General Schedule (indicated with @) that have similar records series on local program schedules.

Changes	New Items	Discontinued Items
<u>Standard 1: Administration and Management Records</u>		
<b>ACCREDITATION RECORDS</b> Added to description outside evaluations of agency		
<b>ADMINISTRATIVE DIRECTIVES, REGULATIONS, AND RULES</b> Added description and modified disposition instructions		
<b>AUDITS: PERFORMANCE</b> Added disposition instructions for PCI attestation reports		
<b>CONSTITUENT COMMENTS, COMPLAINTS, PETITIONS, AND SERVICE REQUESTS</b> Changed title from Citizen to Constituent; clarified that requests for reasonable accommodation included in this series are those from the general public; changed retention for all complaints to 1 year		

Changes in 2021 General Records Schedule: Local Government Agencies



Changes	New Items	Discontinued Items
<b>CONSTITUENT SURVEYS</b> Changed title from Citizen to Constituent		
<b>FACILITY MAINTENANCE, REPAIR, AND INSPECTION RECORDS</b> Clarified this series also includes records related to agency-owned property as well as warranties		
<b>GRANTS</b> Added to description any required certifications and disclosures; specified disposition for grants funded by local appropriations		
	<b>HISTORICAL DESIGNATIONS RECORDS</b>	
<b>LOGISTICS MATERIALS</b> Added agency activities to the description and modified disposition instructions		
<b>MISCELLANEOUS (NON-BUILDING) APPLICATIONS, LICENSES, AND PERMITS</b> Added to description free government-issued business permits		
<b>OFFICE AND PROPERTY SECURITY RECORDS</b> Changed title from Office Security Records; added property to the description and added disposition instructions for recordings that may necessitate action by law enforcement		
	<b>PHONE LOGS</b>	

Changes	New Items	Discontinued Items
Inserted PUBLIC BODIES at beginning of series titles to group together: <ul style="list-style-type: none"> <li>• Agenda and Meeting Packets (also added exhibits to description)</li> <li>• Applications for Appointment</li> <li>• Appointment Reports</li> <li>• Audio and Video Recordings of Meetings</li> <li>• Notices of Public Meetings (renamed Meeting Notices)</li> <li>• Governing and Advisory Body Member File (renamed Member Files)</li> <li>• Minutes of Public Bodies (renamed Minutes)</li> </ul>		
	PUBLIC BODIES: CORRESPONDENCE	
REBATE PROGRAM RECORDS Deleted Citizen from title		
REPORTS AND STUDIES Added a specific disposition for quarterly reports		
REQUESTS FOR PROPOSALS Specified inclusion of elements created by the agency (e.g., notices, evaluations)		
STAFF MEETINGS FILE Renamed from Minutes (Staff Meetings) and added additional materials relevant to internal meetings along with materials from external that had been listed in Agenda and Meeting Packets		
STRATEGIC PLAN Renamed from Comprehensive Plan, added mission statements to the description, and clarified disposition instructions		

Changes	New Items	Discontinued Items
<b>Standard 2: Budget, Fiscal, and Payroll Records</b>		
ACCOUNTS PAYABLE Modified disposition of reimbursements to reflect DES requirements		
ACCOUNTS RECEIVABLE Modified description to add records for debt setoff program		
BOND CLOSING RECORDS Increased retention requirement to mirror state requirements		
GRANTS: FINANCIAL Specified disposition for grants funded by local appropriations		
LONGEVITY PAY Increased retention to reflect DES requirements		
PAYROLL AND EARNINGS RECORDS Increased retention to reflect DES requirements; added employer contributions to description		
PAYROLL DEDUCTION RECORDS Added retirement deductions to description		
SHIFT PREMIUM PAY Increased retention to reflect DES requirements		
TAX FORMS Increased retention to reflect DES requirements		
TIME SHEETS, CARDS, AND ATTENDANCE RECORDS Increased retention to reflect DES requirements		
TRAVEL REIMBURSEMENTS Increased retention to reflect DES requirements		
<b>Standard 3: Geographic Information System (GIS) Records</b>		
MAPS: ALL OTHER Included paper maps in description		

Changes	New Items	Discontinued Items
Standard 4: Human Resources Records (previously Personnel Records)		
<b>APPLICATIONS FOR EMPLOYMENT</b> Added pointer in disposition to Seasonal and Contract Workers		
<b>BENEFITS RECORDS</b> Specified disposition for correspondence with providers		
		<b>CERTIFICATION AND QUALIFICATION RECORDS</b> Already covered by Training and Educational Records; Conferences and Workshops
<b>HAZARDOUS MATERIALS TRAINING RECORDS</b> Added to description documentation of loans of radioactive materials for training purposes		
<b>MEDICAL RECORDS</b> Clarified description to include records of employees, contractors, and volunteers; expanded description of health and physical examinations		
<b>PERSONNEL RECORDS (OFFICIAL COPY)</b> Clarified description to specify employees eligible for benefits		
<b>POLICIES AND PROCEDURES (PERSONNEL)</b> Added description; deleted disposition for non-internal records, which should be considered part of the Reference (Reading) File, and added disposition for HR administrative records (e.g., employee orientation materials)		



Changes	New Items	Discontinued Items
<b>RETIREMENT RECORDS</b> Clarified description; removed separate disposition for deferred compensation – those that are from retirement plans are covered in this item, and those that are for some sort of bonus should be treated as Payroll and Earnings Records		
<b>TRAINING AND EDUCATIONAL RECORDS</b> Added general training materials to description; added disposition for expired employee certifications/qualifications along with one for general training materials		
<b>UNEMPLOYMENT COMPENSATION CLAIMS</b> Increased retention to reflect DES requirements		
<b>UNEMPLOYMENT COMPENSATION REPORTS</b> Increased retention to reflect DES requirements		
<b>Standard 5: IT Records</b>		
Clarified retention for fixity check documentation		
<b>Standard 6: Legal Records</b>		
<b>ANNEXATION RECORDS</b> Specified disposition for withdrawn petitions		
<b>CIVIL RIGHTS CASE RECORDS</b> Specified disposition for employee requests for reasonable accommodations		
<b>ENCROACHMENTS</b> Changed description from citizens to residents		
	<b>EXPUNCTIONS</b>	
	<b>INVESTIGATION AND HEARING RECORDS</b>	
		<b>REASONABLE ACCOMMODATIONS</b> Already covered by Constituent Comments, Complaints, Petitions, and Service Requests
	<b>SETTLEMENTS</b>	



Changes	New Items	Discontinued Items
<b>Standard 8: Risk Management Records</b>		
<b>DISASTER RECOVERY</b> Clarified description and specified disposition for records evaluating the efficacy of recovery efforts		
	<b>EMERGENCY NOTIFICATIONS</b> Moved from the Emergency Services standard of the old County Management schedule	
<b>FIRE, HEALTH, AND ENVIRONMENTAL SAFETY RECORDS</b> Added Environmental to the series title and added specific dispositions for inspection reports and safety audits		
	<b>FIXED NUCLEAR FACILITIES PLANS FILE</b> Moved from the Emergency Services standard of the old County Management schedule	
<b>HAZARDOUS MATERIALS MANAGEMENT</b> Broadened description and added numerous dispositions for particular types of hazardous materials; now includes asbestos management plans		<b>ASBESTOS MANAGEMENT PLAN</b>
<b>LOST, STOLEN, OR DAMAGED PROPERTY REPORTS</b> Deleted citizen from description		
	<b>NATIONAL FLOOD INSURANCE PROGRAM RECORDS</b> Moved from the Emergency Services standard of the old County Management schedule	