

# **LOCAL GOVERNMENT RECORDS COMMITTEE**

Tuesday, April 18, 2023

10:30 A.M.

William F. Winter Archives & History Building  
Jackson, Mississippi

## **AGENDA**

- I. Call to Order
- II. Public Comment
- III. Minutes  
Adoption of Minutes from January 17, 2023
- IV. Report of Local Government Records Office
- V. Consideration of Proposed Retention Schedules
  - All Local Governments
    - Health Insurance GSL 06-11
    - Personnel Records GSL 05-15 thru 16
  - Counties
    - Circuit Clerk GSC 07-09
    - Law Enforcement GSC 08-35
  - Municipalities
    - Law Enforcement GSM 08-15
- VI. Other Business
- VII. Adjournment

# **MISSISSIPPI DEPARTMENT OF ARCHIVES AND HISTORY**

## **MINUTES OF A MEETING OF THE LOCAL GOVERNMENT RECORDS COMMITTEE**

**Tuesday, January 17, 2023**

The Local Government Records Committee held its regular quarterly meeting at 10:30 a.m. on Tuesday, January 17, 2023, in the 3<sup>rd</sup> Floor Board Room of the William F. Winter Archives and History Building, Jackson, Mississippi. David Pilcher, Director, Archives & Records Services, presided. Lauren Harmon, LGR Specialist, Local Government Records (LGR) Office, A&RS, recorded the minutes of the meeting.

The following members of the Committee were present:

Angela Richburg, Mississippi Municipal League; and  
Anne Webster, At-large Member.

The following members of the Committee attended by teleconference:

Phil Burchfield, Association of School Superintendents;  
Felecia Caples, Mississippi Historical Society;  
Lisa Chism, Department of Revenue;  
Tim Kellar, Mississippi Chancery Clerks' Association;  
Taylor McKee, State Auditor;  
Misty Monroe, Office of the Attorney General; and  
Ahmad Smith, Mississippi Bar Association.

The following members of the Committee were absent:

James Brumfield, Mississippi Sheriffs' Association;  
Norman A. Cannady, Assessors/Collectors Association;  
Cathy Clark, Municipal Clerks and Collectors' Association;  
Erin Feathers, Mississippi Genealogical Society;  
Jennifer Head, Office of the Secretary of State;  
Landis Mickens, Mississippi Association of Supervisors; and  
Zack Wallace, Circuit Clerks Association.

The following MDAH staff members were present:

Tim Barnard, Director, Local Government Records Office, A&RS; and  
Bob Dent, Director of Government Records, A&RS

- I. Mr. Pilcher recognized a quorum and called the meeting to order.

- II. Mr. Pilcher acknowledged an opportunity for public comment. There was no public comment.
- III. Minutes of the July 19, 2022, meeting were presented to the Committee. Ms. Webster moved, Ms. Richburg seconded, and the Committee unanimously approved the minutes.
- IV. Mr. Barnard reported on the recent activities of the LGR Office, which has not yet reached pre-COVID levels. There were seven “A Day at Your Disposal” (DAYD) visits to six counties and one municipality, as well as thirteen courtesy visits to three counties and ten municipalities. There are DAYD visits to Hancock and Quitman counties scheduled for later this month.

Ms. Harmon persuaded several more municipalities to join the Local Government Records Program, including Ocean Springs and Moss Point. The total number of participating municipalities is twenty-six, doubling the numbers from last year. Ms. Blount, MDAH Director, spoke again at the Municipal League’s Conference on January 9 about the fee, hopefully sparking more interest. Meanwhile, Itawamba County has joined, leaving only three counties not collecting the fee.

The LGR Office held its annual *Maintaining a Healthy Records Program* workshop in October, with sixty-two people attending at least one session. They represented 28 counties, 17 municipalities, 3 libraries, 2 school districts, and 7 community colleges; there were 5 others who were not identified. An in-person, county-specific version of this workshop will be conducted with Hancock County next week.

This week, the MDAH Board of Trustees will review nine applications for the Local Government Records Grant, awarding up to \$10,000 towards each grantee with a total of \$50,000. This yearly grant program is available only to participating counties.

- V. Mr. Barnard presented the following schedules:

- A. All Local Governments

- Personnel Records

- GSL 05-01a Personnel File, Official Record

- Description: The master personnel record maintained for each employee. May include job application, personnel transaction record reflecting position classification and salary level, payroll withholding information, leave summary record, performance documentation, and other documents related to the individual’s employment. See Schedule GSL 05-01b for any records needed to calculate post-employment benefits.  
*Replaces Schedules CJC 05-01, GSC 05-02, GSM 05-02, GSS 05-02, and Lib 04-04.*

Retention: ~~Fifty-five years after earliest date of hire, OR~~ Seven (7) years after termination of employment.

GSL 05-01b Retirement Documentation

Description: All records needed for the retirement of an employee, including requests for retirement, insurance authorization, correspondence, election of option forms, calculations of benefits, etc.

Retention: Fifty-five (55) years after earliest date of hire, OR Seven (7) years after termination of employment, whichever is later.

GSL 05-06 ~~Job Applications, Not Hired~~ Applicant Records

Description: ~~Applications submitted for employment from individuals not hired for the position.~~

Records documenting the selection process and justification for non-hire, including job applications, pre-employment assessments, denial letter, etc.

Retention: Two (2) years after final decision on position applied for.  
Copies used by supervisors and selection committee: One (1) year after final decision.

Mr. Barnard explained that the entire personnel file was not required to be retained for fifty-five (55) years and only the retirement documentation was needed for that longer period of time. The personnel officer could move all retirement documents to another folder, disposing of all other personnel information sooner. The amendment to GSL 05-06 was made to create a larger scope for the schedule.

Ms. Richburg moved, Mr. Kellar seconded, and the Committee unanimously approved the retention schedules.

#### Personnel Records

GSL 05-10 Pre-Employment Documents

Description: Documents related to the hiring process, including job descriptions, recruitment notices, job advertisements, etc.

Retention: Until Superseded.

GSL 05-11 Pre-Employment Assessments, Hired

Description: Civil Service Exams, analysis forms, resumes, and other related documents used in determining whether an applicant is hired.

Retention: Three (3) years.

GSL 05-12 Employee Licenses / Certifications

Description: Any licenses / certification issued to an employee by professional, educational, or other agencies and organizations. Typically, they are occupation-specific and are often requirements for employment.

Retention: Until superseded.

GSL 05-13 Training Records – Individual

Description: This series documents all training completed by individuals employed by the local government, whether educational or professional development.

*Replaces Schedules GSC 15-18, GSC 08-19, GSM 17-18, and GSM 08-08.*

Retention: Three (3) years after termination of employment.

GSL 05-14 Training Records – General

Description: This series documents training activity provided to local government personnel. Information in this series includes description of training activities, sign-in sheet, and general information regarding the training provided. See GSL 05-13 Training Records – Individual, for records regarding individuals attending training.

*Replaces Schedules GSC 15-19, GSC 08-20, GSM 17-19, and GSM 08-09.*

Retention: Course Materials and Forms: Until superseded.  
Training Day Records: 5 years.

Mr. Barnard explained that a municipality asked about retention of Civil Service Exams, and staff realized that further schedules were needed. For the training records, there were previous schedules for fire and law enforcement in the county and municipal schedules, so a general schedule was created for everyone. It was also found that the original retention of ten (10) years for general training records was unnecessarily long, so it was reduced to five (5) years.

Ms. Webster moved, Ms. Caples seconded, and the Committee unanimously approved the retention schedules.

#### VI. Consideration of Pre-1920s Records Disposal Request – **Lauderdale County**

Lauderdale County will soon be moving into a new courthouse, with their county archives moving into the old courthouse. The archivist is searching for records that are eligible for disposal before the transfer. All records listed are dated from 1900 to 1920. The request includes county and tax collector cash books, as well as their cash receipts and disbursements, along with tax receipt books. Typically, these tax receipt books can be disposed of if the land roll is maintained – which it is. Additionally, the entries appear in chronological order; without an index, they are useless.

Mr. Burchfield moved, Ms. Webster seconded, and the Committee unanimously approved the retention schedules.

VII. Other Business

The date for the next Local Government Records Committee meeting is Tuesday, April 18, 2023 at 10:30 A.M.

VIII. Adjournment

There being no further business, Mr. Pilcher adjourned the meeting.

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David Pilcher, Chair

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# PROPOSED RECORDS RETENTION SCHEDULE

## All Local Governments

### Health Insurance

SERIES	TITLE	DESCRIPTION	RETENTION
GSL 06-11	Continuation of Insurance Benefits (COBRA) records	Records documenting individual election whether to continue insurance benefits beyond employment with the local government entity.	Six (6) years after termination of employment.

These retention schedules are being presented April 18, 2023, to the Local Government Records Committee for adoption. Use of these schedules for records disposition may not be undertaken until approval by the committee. Public comments are welcomed. Approved retention guidelines are available at "[www.mdah.ms.gov/new](http://www.mdah.ms.gov/new)."

Public comments may be sent to "Local Government Records Office, P. O. Box 571, Jackson, MS 39205" or by email to "[locgov@mdah.ms.gov](mailto:locgov@mdah.ms.gov)"

# PROPOSED RECORDS RETENTION SCHEDULE

## All Local Governments

### Personnel Records

SERIES	TITLE	DESCRIPTION	RETENTION
GSL 05-15	Verification of Employment Records	Inquiries and responses concerning verification of an employee's prior or current employment with the local government entity.	Three (3) years.
GSL 05-16	Family Medical Leave Act (FMLA) Records	Records documenting extended absence from work by an employee under provisions of the federal Family Medical Leave Act. Confidential medical records must be kept separate from main personnel file.	Three (3) years after release of audit following termination of extended absence.

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# PROPOSED RECORDS RETENTION SCHEDULE

## Counties

### Circuit Clerk

SERIES	TITLE	DESCRIPTION	RETENTION
GSC 07-09	Appearance Bonds	Bonds filed through the sheriff's office and forwarded to the clerk regarding individuals arrested for various offenses. If an individual is indicted, the bond may be added to the appropriate case file; bonds without an indictment are often filed together.	Ten (10) years from date of filing.

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# PROPOSED RECORDS RETENTION SCHEDULE

## Counties

### Law Enforcement

SERIES	TITLE	DESCRIPTION	RETENTION
GSC 08-35	Sex Offender Registry Files	Information pertaining to convicted sex offenders, including court orders, drivers license copies, sex offender agreement forms, acknowledgement forms, and related files.	One (1) year after annual update showing offender no longer resides in county, by either moving, subsequent incarceration outside the county, or death.

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# PROPOSED RECORDS RETENTION SCHEDULE

## Municipalities

### Law Enforcement

SERIES	TITLE	DESCRIPTION	RETENTION
GSM 08-15	Sex Offender Registry Files	Information pertaining to convicted sex offenders, including court orders, drivers license copies, sex offender agreement forms, acknowledgement forms, and related files.	One (1) year after annual update showing offender no longer resides in municipality, by either moving, subsequent incarceration outside the municipality, or death.

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