

# Grants, Loans & Tax Incentive Programs

SCHEDULE NUMBER	SERIES TITLE	DESCRIPTION	DISPOSITION INSTRUCTIONS	DATE APPROVED
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

G236	Grant Operating Files - Awarded, Pass-Through	This series consists of files related to grants for which a state agency, board, or commission has received a federal pass-through grant. Included are budget modifications, correspondence, invoices, pay vouchers, and related items. (2 CFR 200.332)	Hold three (3) years after close of grant, then dispose. Must be held three (3) years after conclusion of audit.	1/16/2025
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