

DEPARTMENT OF PERSONNEL & ADMINISTRATION  
 STATE ARCHIVES AND PUBLIC RECORDS  
 RECORDS DISPOSITION SCHEDULE

Archives No  
 07-29

DEPARTMENT	DIVISION	SECTION	PERMANENT	X
Local Affairs	Property Taxation	Exemptions	NON-PERMANENT	

ITEM NO.	DESCRIPTION	RETENTION PERIOD	SPECIAL INSTRUCTIONS
1.	<b>Exemption Files</b> A. Application for Exemption and Supporting Documentation B. Determination Sheets C. Annual Reports for Exemption D. Reports to the Administrator E. Field or other Investigative Reports F. Notice of Revocation of Exemption G. Notice of Forfeiture of Right to Claim Exemption H. Appeals to Board of Assessment Appeals 1) Appeal (copy) 2) Briefs (copy) 3) Board of Decision (copy) I. Appeal to Appellate Courts 1) Court Decision	Permanent	Microfilm Microfilm at yearly intervals Transfer silver microfilm to custody of State Archivist Destroy originals after microfilm has been accepted for transfer/deposit in State Archives.  NOTE: No record shall be destroyed that pertains to any pending legal case, claim, action or audit.

I request approval of the above records disposition schedule. Retention periods have been established by this agency after careful evaluation of all of the factors listed in the State Records Management Policies and Procedures Manual. I hereby certify that I am authorized to act for the head of this agency in matters pertaining to disposal of records. I also certify that I will comply with all conditions listed on page 4-10 of the Records Management Policies and Procedures Manual.

State Archivist's Signature <i>Terry Jettison</i>	Date 12/19/2006	Records Liaison Officer's Signature <i>Monica Acoustic</i>	Date 11/16/2006
Attorney General's Signature <i>John W. Suthers by mmm</i>	Date 1/24/07	State Auditor's Signature <i>[Signature]</i>	Date 1/8/07

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2.	<b>Yearly Exemption Print Outs</b> A. Alpha Index to Property Owners B. Exempt properties by parcel ID C. Exempt properties by class code (type of Exemption) D. Exempt Property Master Record	Current + three years	Current and preceding year kept on-site, prior years in storage at Camp George West.
3.	<b>Exemption Files Additional Information</b> A. Field Examiner's report worksheets B. Sketches of land or improvements C. Recorded deeds or contracts D. Articles of incorporation E. Bylaws F. Financial Statements G. Telephone call records H. Internal notes I. Bulletins, reports or Announcements J. Any other information gathered	Kept on-site for six months after final determination	This is information gathered during the course of an exempt property examination that is not required to be permanently retained as part of the official record  NOTE: No record shall be destroyed that pertains to any pending legal case, claim, action or audit.

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State Archivist's Signature <i>Terry Helton</i>	Date 12/19/2006	Records Liaison Officer's Signature <i>Mona Houston</i>	Date 11/16/2006
Attorney General's Signature <i>John W. Suthers by mm</i>	Date 1/24/07	State Auditor's Signature <i>Robert E. Ray</i>	Date 1/8/07