Records Retention Policy

Draft Considerations

Definitions

Records Retention Schedule - A retention schedule describing the records and setting the minimum retention period is required for each record series. A record series, as defined in Rule 1B-24, Florida Administrative Code, is “a group of related public records arranged under a single filing arrangement or kept together as a unit (physically or intellectually) because they consist of the same form, relate to the same subject or function, result from the same activity, document a specific type of transaction, or have some other relationship arising from their creation, receipt, or use.” Examples of series that agencies might maintain are Personnel Files, Client Case Files, Project Research Files, Equipment Maintenance and Repair Records, and Procurement Files. Each record series might contain records in a variety of forms and formats that collectively document a particular program, function or activity of the agency.

Financial Records

Audits

Description

Retention Schedule

Operational Records

Audits

Description

Retention Schedule

Performance Records

Description

Retention Schedule

Volunteer Records

Description

Retention Schedule

References

<https://files.floridados.gov/media/706717/gs1-sl-june-2023.pdf>