

**PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS**

AGENDA ITEM SUMMARY

Meeting Date: August 14, 2018 ☒ **Consent** ☐ **Regular**
☐ **Workshop** ☐ **Public Hearing**

Department:

Submitted By: Clerk & Comptroller, Palm Beach County

Submitted For: Sharon R. Bock, Clerk & Comptroller

I. EXECUTIVE BRIEF

Motion and Title:

Staff recommends motion to receive and file: A list of Clerk & Comptroller (Clerk) Finance Department records which have met the revised required State retention schedule and are scheduled for destruction.

Summary:

These records have met the required retention schedule of the Florida Division of Library and Information Services (§28.30, §28.31, §257.36 (6))

Background and Justification:

The Clerk seeks to notify the Board of her intent to destroy these records in advance of their destruction.

Attachments:

- Memorandum from Clerk's Finance Department with Records Destruction Authorization.
- General Records Schedule GS1-SL for State and Local Government Agencies.
- Compact Diskette containing Records for Destruction.

Recommended by: Stephen I. Weiss, Director - Finance Services Date 7-19-18

Approved by: N/A
County Administrator Date

II. FISCAL IMPACT ANALYSIS

A. Five Year Summary of Fiscal Impact:

Fiscal Years	2018	2019	2020	2021	2022
Capital Expenditures	_____	_____	_____	_____	_____
Operating Costs	_____	_____	_____	_____	_____
External Revenues	_____	_____	_____	_____	_____
Program Income (County)	_____	_____	_____	_____	_____
In-Kind Match (County)	_____	_____	_____	_____	_____
NET FISCAL IMPACT	_____	_____	_____	_____	_____
# ADDITIONAL FTE POSITIONS (Cumulative)	_____	_____	_____	_____	_____

Is Item Included In Current Budget? Yes _____ No _____

Does this item include the use of Federal Funds? Yes _____ No _____


Budget Account No.: Fund _____ DEPT _____ Unit _____ Object _____

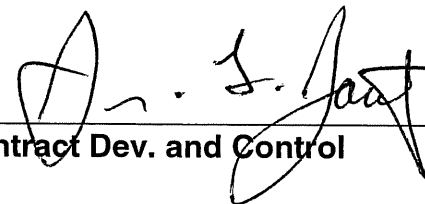
B. Recommended Sources of Funds/Summary of Fiscal Impact:
No Fiscal Impact

C. Departmental Fiscal Review:


III. REVIEW COMMENTS

A. OFMB Fiscal and/or Contract Dev. and Control Comments:


Lisa Pan 7/19/18
OFMB 7/19/18


An. S. Jant 7/26/18
Contract Dev. and Control

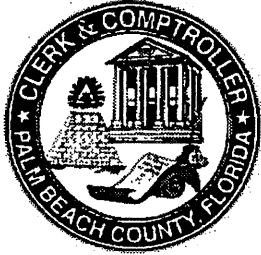
B. Legal Sufficiency:



Assistant County Attorney

C. Other Department Review:

Department Director



SHARON R. BOCK
Clerk & Comptroller
Palm Beach County

Memorandum

Date: July 10, 2018
From: Patricia Conceicao, Finance Department Records Management Coordinator
To: Elena Madonna, Manager, Financial Services, Revenue & Cash Management
Subject: Destruction of Finance Department Records

In the table below, you will find a listing of Finance Records from your department that are due for destruction. Attached you will find excerpts of the General Records Schedule for State and Local Government agencies that pertain to these records. As outlined below, this approval consists of Board County Commissioners Records totaling 133 boxes/199.5 cubic feet.

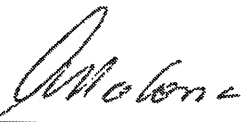
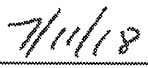
Schedule Item Number	Record Series Titles	Start/End Fiscal Year	Number of Boxes/Volume in Cubic Feet
GS1-SL Item #365	RECEIPT/REVENUE RECORDS: DETAIL Record copy, 5 fiscal years after transaction completed.	2009 & 2012	133 boxes 199.5 cubic feet

Please review the attachments and indicate your approval for this records destruction. Your signature on the approval form attests that, to the best of your knowledge, there are no unresolved (1) audit questions, (2) investigations, (3) civil suits pending, (4) pending/open public records requests, or (5) other reasons for delaying the destruction.

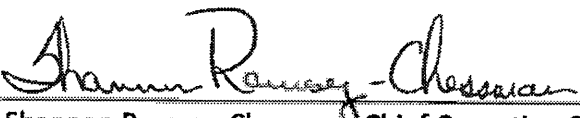
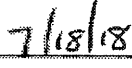
If the destruction is to be delayed, please state the reason below. Please return the completed package to the Finance Department Records Management Coordinator after signing.

If you should have any questions, please contact the Finance Department Records Management Coordinator. Thank you in advance for your assistance in this matter.

Reason for destruction delay

 _____  _____

Elena Madonna, Manager, Financial Services, Revenue Date

 _____  _____

Shannon Ramsey-Chessman Chief Operating Officer Date

PUBLICATION PRODUCTION RECORDS

Item #198

This record series consists of records used to generate publications such as catalogs, pamphlets, leaflets, and other media items. The series may include, but is not limited to, rough, blue lined, camera-ready, and final copies, as well as illustrations (e.g., cropped photographs). See also "NEWS RELEASES" and "PUBLIC INFORMATION FILES."

RETENTION: Retain until receipt of final, published copy or cancellation of publication project.

PURCHASING RECORDS

Item #42

This record series consists of copies of purchase orders that are retained by the originating office, while the record copy is sent to the Purchasing/Business Office and another copy is sent to the appropriate vendor for action. The series may include, but is not limited to, copies of requisitions, copies of receiving reports, and a log of outstanding and paid requisitions and purchase orders used for cross-referencing purposes. See also "DISBURSEMENT RECORDS: DETAIL."

RETENTION: Retain until obsolete, superseded, or administrative value is lost.

RADIO LOGS

Item #292

This record series consists of a log recording such information as the time radio calls were received/placed, who the transmitting parties were, the reason for the call, if additional units were dispatched to a location, or if information was retrieved and transmitted back to the caller. These logs may be used for police, fire, EMS, or other radio dispatch operations including road and bridge or development departments. See also "911 COMMUNICATIONS RECORDS," "911 RECORDS: LOGS" and "COMMUNICATIONS AUDIO RECORDINGS."

RETENTION: 1 fiscal year.

RAIN CHECKS

Item #293

This record series documents rain checks issued to persons who have paid a fee or charge for an event, service, activity, or commodity that cannot be provided as scheduled. The records provide such information as date rain check was issued, event or item to be provided, expiration date, any limitations on use of the rain check, and name of the staff member issuing the rain check.

RETENTION: 3 fiscal years.

REAL PROPERTY RECORDS: CONDEMNATION/DEMOLITION

Item #364

This record series documents the demolition and clearance of buildings deemed unfit for occupancy or condemned. The series may include, but is not limited to, demolition orders, inspection reports, notices to property owners, and copies of any related court documents.

RETENTION: 5 anniversary years after final action.

REAL PROPERTY RECORDS: PROPERTY ACQUIRED

Item #172

This record series consists of documents pertaining to real property acquired by a government agency. The series may include, but is not limited to, agency property deeds, appraisals, surveys, copies of building plans or blueprints, records of sale or other disposition of the property, and other supporting documents. See also "REAL PROPERTY RECORDS: PROPERTY NOT ACQUIRED."

RETENTION: 3 fiscal years after termination of agency's ownership of the real property.

REAL PROPERTY RECORDS: PROPERTY NOT ACQUIRED

Item #164

This record series consists of documents pertaining to real property considered for acquisition but not acquired by a government agency. The series may include, but is not limited to, appraisals, surveys and other supporting documents. See also "REAL PROPERTY RECORDS: PROPERTY ACQUIRED."

RETENTION: 3 fiscal years.

RECEIPT/REVENUE RECORDS: DETAIL

Item #365

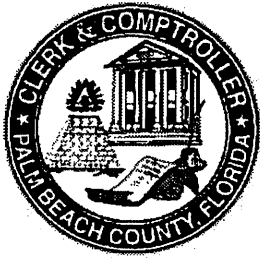
This series consists of records documenting specific receipts/revenues collected by an agency through cash, checks, electronic fund transfers (EFT), credit and debit cards, or other methods. The series may include, but is not limited to, records such as cash collection records and reports, cash receipt books, cash register tapes, deposit/transfer slips, EFT notices, credit and debit card records, receipt ledgers, receipt journal transactions and vouchers, refund records, bad check records, and other accounts receivable and related documentation. **NOTE:** Agencies that electronically transmit checks to a financial institution must retain the checks under this item unless the financial institution is retaining complete images of the checks for the minimum retention required for this item. Retention is based on Section 95.11(2), *Florida Statutes*, Statute of Limitations on contracts, obligations, or liabilities. See also "RECEIPT/REVENUE RECORDS: SUMMARY."

RETENTION: 5 fiscal years after transaction completed.

RECEIPT/REVENUE RECORDS: SUMMARY

Item #366

This record series consists of records providing summary or aggregate documentation of receipts/revenues collected by an agency. The series may include, but is not limited to, records such as trial balance reports, bank statements, credit



SHARON R. BOCK

Clerk & Comptroller
Palm Beach County

Memorandum

Date: July 10, 2018
From: Patricia Conceicao, Finance Department Records Management Coordinator
To: Paul A. Guzinski, Manager, Financial Services, Financial Reporting
Subject: Destruction of Finance Department Records

In the table below, you will find a listing of Finance Records from your department that are due for destruction. Attached you will find excerpts of the General Records Schedule for State and Local Government agencies that pertain to these records. As outlined below, this approval consists of Board County Commissioners Records totaling 18 boxes/27 cubic feet.

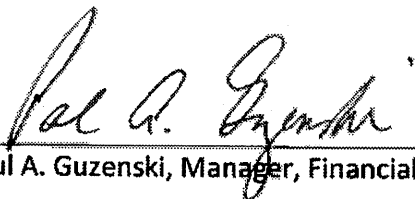
Schedule Item Number	Record Series Titles	Start/End Fiscal Year	Number of Boxes/Volume in Cubic Feet
GS1-SL Item # 340	DISBURSEMENT RECORDS: DETAIL Record copy, 5 Fiscal years after transaction completed.	2012 & Prior	15.5 boxes 23.25 cubic feet
GS1- SL Item # 85	BANK STATEMENTS: RECONCILIATION Record copy, 5 fiscal years.	2011	2 boxes 3 cubic feet
GS1-SL Item # 242	DRAFTS AND WORKING PAPERS Retain until obsolete, superseded or administrative value is lost.	2009	.5 boxes 0.75 cubic feet

Please review the attachments and indicate your approval for this records destruction. Your signature on the approval form attests that, to the best of your knowledge, there are no unresolved (1) audit questions, (2) investigations, (3) civil suits pending, (4) pending/open public records requests, or (5) other reasons for delaying the destruction.


If the destruction is to be delayed, please state the reason below. Please return the completed package to the Finance Department Records Management Coordinator after signing.

If you should have any questions, please contact the Finance Department Records Management Coordinator. Thank you in advance for your assistance in this matter.

Reason for destruction delay

 7/11/18

Paul A. Guzenski, Manager, Financial Services, Financial Reporting Date

 7/18/18

Shannon Ramsey-Chessman Chief Operating Officer Date

General Records Schedule GS1-SL for State and Local Government Agencies

AUDITS: SUPPORTING DOCUMENTS

Item #57

This record series consists of the documentation and supporting documents used to develop audit reports, including all bills, accounts, transaction records, reports or other related documentation. The audits may be instigated by any agency, organization, or internal management. See also "AUDITS: AUDITOR GENERAL," "AUDITS: INDEPENDENT," "AUDITS: INTERNAL," and "AUDITS: STATE/FEDERAL."

RETENTION: 5 fiscal years after audit report release date.

AUTOMATED ACCOUNTING SYSTEM REPORTS

Item #50

This record series consists of reports generated by an agency's automated accounting system, such as SAMAS (State Automated Management Accounting System), FLAIR (Florida Accounting & Information Resource), Aspire, or other automated accounting system. Included are such reports as a log of all updated transactions entered into the system and a financial statement for each month for all divisions and/or bureaus of the agency. See also "DISBURSEMENT RECORDS: DETAIL," "DISBURSEMENT RECORDS: SUMMARY," "RECEIPT/REVENUE RECORDS: DETAIL," "RECEIPT/REVENUE RECORDS: SUMMARY," and "FINANCIAL HISTORY SUMMARY RECORDS."

RETENTION: 3 fiscal years.

BACKFLOW AND CROSS CONNECTION CONTROL PROGRAM RECORDS

Item #416

This record series documents the testing of residential and commercial backflow assemblies. The Backflow and Cross Connection Control Program (established pursuant to Rule 62-555.360, *Florida Administrative Code*, Cross-Connection Control for Public Water Systems) prevents the backflow of contaminants into the potable water supply. The series includes, but is not limited to, backflow prevention device inspection forms, backflow assembly test/certification forms, reclaimed water surveys and cross connection control inspection forms. Information regarding the number of inspections completed is generated from these forms and submitted as an annual report to the Florida Department of Health. Retention is pursuant to Rule 62-550.720(3), *Florida Administrative Code*, Recordkeeping.

RETENTION: 10 anniversary years.

BACKUPS: ELECTRONIC/DIGITAL RECORDS

There is no retention schedule for backup tapes, disks, drives, servers or other forms of electronic/digital data backup. A backup should be just that, a data/records backup kept solely for disaster recovery/business continuity but *not intended to serve as the record copy or as a records retention tool*. In the case of disaster, the backup would be used to recover system operability and/or restore lost records; otherwise, agency records that have not met their retention should *not* be disposed of on the basis of the existence of a backup. If for any reason (for instance, a disaster erases emails on your server) the only existing copy of an item that has not met its retention period is on a backup tape or drive, the custodial agency of that record must ensure that the record on the backup is maintained for the appropriate retention period. A backup containing record copies/only existing copies of items that have not passed their retention would have to be retained for the length of the longest unmet retention period. Preferably, the records should be restored to the agency's systems from the backup to ensure that the backup is not used as a records retention tool.

BALLOTS

Item #397

This record series consists of ballots and related records for elections conducted to determine issues not governed by Florida election laws. This may include votes on issues addressed by municipal pension board members, advisory councils and committees; election of a chair by board members; election of members of a pension board by employees; and other similar instances. The series may include, but is not limited to: nomination forms, ballots, envelopes, vote tally sheets, and related unused forms. **NOTE:** For ballots and vote sheets for votes that are required to be taken in public by public officers at public meetings as defined in Section 286.011, *Florida Statutes*, use MINUTES: OFFICIAL MEETINGS (PRELIMINARY/AUDIO RECORDINGS/VIDEO RECORDINGS). **NOTE:** For ballots and other records relating to elections governed by Florida election laws, use *General Records Schedule GS3 for Election Records*.

RETENTION: 30 days after vote count or cancellation of election.

BANK/FINANCIAL ACCOUNT STATEMENTS

Item #85

This record series consists of monthly statements of bank/financial accounts and any related reconciliation records documenting debits, credits and account balances. See also "DISBURSEMENT RECORDS" items and "RECEIPT/REVENUE RECORDS" items.

RETENTION: 5 fiscal years.

BARGAINING RECORDS

Item #87

This record series consists of contracts and supporting documentation related to contracts or agreements between public agencies and labor organizations or employee unions.

RETENTION: 5 fiscal years after expiration or cancellation of contract.

BID RECORDS: CAPITAL IMPROVEMENT SUCCESSFUL BIDS

Item #70

This record series documents the processing and letting of capital improvement successful bids including, but not limited to, legal advertisements, "Requests for Proposals," "Requests for Qualifications," "Letters of Interest," "Invitations to Bid,"

General Records Schedule GS1-SL for State and Local Government Agencies

DISBURSEMENT RECORDS: DETAIL

Item #340

This series consists of records documenting specific expenditures or transfers of agency moneys for the procurement of commodities and services and other purposes. The series may include, but is not limited to, procurement records such as requisitions, requisition logs, purchase orders, contracts, purchasing card (p-card) receipts, vendor invoices, receiving reports, acceptances of contract deliverables, approvals, and related documentation; and expenditure records for disbursements made through checks, warrants, electronic fund transfers (EFT), purchasing cards, or other methods, such as payment vouchers, approvals, check registers, canceled or voided checks, check stubs, canceled or voided warrants, disbursement ledgers, journal transactions, expenditure detail reports, refund records, and other accounts payable and related documentation. The series may also include a copy of the agency's sales tax exemption form. Retention is based on Section 95.11(2), *Florida Statutes*, Statute of Limitations on contracts, obligations, or liabilities. See also "DISBURSEMENT RECORDS: SUMMARY," "PURCHASING RECORDS," and "TRAVEL RECORDS."

RETENTION: 5 fiscal years after transaction completed.

DISBURSEMENT RECORDS: SUMMARY

Item #341

This series consists of records providing summary or aggregate documentation of expenditures or transfers of agency moneys for the procurement of commodities and services and other purposes. The series may include, but is not limited to, summary records such as trial balance reports, check logs and registers, summary expenditure reports, federal grant final closeout reports, summary journal transactions, and other accounts payable summary and related documentation. See also "DISBURSEMENT RECORDS: DETAIL."

RETENTION: 10 fiscal years.

DISCIPLINARY CASE FILES: EMPLOYEES

Item #98

This record series documents the investigation of allegations of employee misconduct and/or violation of department regulations or orders, state or federal statutes, or local ordinances. The series may include, but is not limited to, statements by the employee, witnesses, and the person filing the complaint. Cases include both formal and informal disciplinary proceedings relating to allegations that were determined as sustained, not sustained, unfounded, or exonerated. "Formal discipline" is defined as disciplinary action involving demotion, removal from office, suspension, or other similar action. "Informal discipline" is defined as any disciplinary action involving written and verbal reprimands, memoranda, or other similar action. These records are filed separately from the employee personnel file, but the final action summary becomes part of the personnel file. See also "EMPLOYEE CONDUCT COUNSELING RECORDS," "PERSONNEL RECORDS" items, and "STAFF ADMINISTRATION RECORDS."

RETENTION: 5 anniversary years after final action.

DOMESTIC PARTNERSHIP REGISTRY RECORDS

Item #399

This record series documents domestic partnerships established and dissolved under authority of law or ordinance. Records may include, but are not limited to, Affidavits of Domestic Partnership, domestic partnership amendments, Affidavits of Termination of Domestic Partnership, and other supporting or related documentation.

RETENTION: Permanent.

DONATION RECORDS

Item #342

This record series documents donations of funds, property, historical documents, artifacts, or other items of long-term value or significance to a public agency or institution including, but not limited to, donations to the collections of cultural heritage institutions such as public archives and museums. The series may include, but is not limited to, correspondence; deeds of gift and/or other transfer documentation; description and/or value of item(s) donated; and documentation of the purpose of the donation and any limitations/restrictions on use. See also "ENDOWMENTS/BEQUESTS/TRUST FUND RECORDS."

RETENTION: Permanent.

DRAFTS AND WORKING PAPERS

Item #242

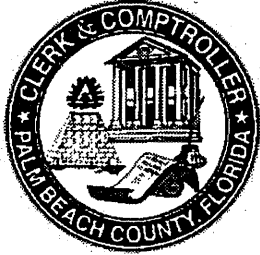
This record series consists of materials used in developing, compiling, and assembling a final product such as an agency report or database. The series may include, but is not limited to, copies of correspondence or memoranda; circulated drafts; data entry forms; notes; calculations; and other supporting documents. Drafts of documents that could have a significant effect on an agency's programs, functions and responsibilities (for instance, agency mission statements or major policy initiatives) should be placed under "ADMINISTRATOR RECORDS: AGENCY DIRECTOR/PROGRAM MANAGER" or other applicable record series.

RETENTION: Retain until obsolete, superseded, or administrative value is lost.

DRUG TEST CASE FILES

Item #260

This record series documents drug testing of individuals under Florida's Drug-Free Workplace Act, or as required for Commercial Driver's License (CDL) or other drivers under U.S. Department of Transportation regulations. The case file may include, but is not limited to, documentation of decisions to administer reasonable suspicion or post-accident testing, or verifying the existence of a medical explanation of the inability of the driver to provide adequate breath or a urine specimen for testing; the employer's copy of a drug or alcohol test form, including the results of the test; a copy of the controlled substances test chain of custody control form; documents sent by the Medical Review Officer (MRO) to the



SHARON R. BOCK
Clerk & Comptroller
Palm Beach County

Memorandum

Date: July 10, 2018
From: Patricia Conceicao, Finance Department Records Management Coordinator
To: Carol Richmond, Manager, Finance Services, Payables
Subject: Destruction of Finance Department Records - Payables

In the table below, you will find a listing of Finance Records from your department that are due for destruction. Attached you will find excerpts of the General Records Schedule for State and Local Government agencies that pertain to these records. As outlined below, this approval consists of Board County Commissioners Records totaling 261 boxes/391.5 cubic feet.

Schedule Item Number	Record Series Titles	Start/End Fiscal Year	Number of Boxes/Volume in Cubic Feet
GS1-SL Item #340	DISBURSEMENT RECORDS: DETAIL Record copy, 5 Fiscal years after transaction completed.	2012 & Prior	261 boxes 391.5 cubic feet

Please review the attachments and indicate your approval for this records destruction. Your signature on the approval form attests that, to the best of your knowledge, there are no unresolved (1) audit questions, (2) investigations, (3) civil suits pending, (4) pending/open public records requests, or (5) other reasons for delaying the destruction.

If the destruction is to be delayed, please state the reason below. Please return the completed package to the Finance Department Records Management Coordinator after signing.

If you should have any questions, please contact the Finance Department Records Management Coordinator. Thank you in advance for your assistance in this matter.

Reason for destruction delay

Carol Richmond
Carol Richmond, Manager, Financial Services, Payables

7/10/18
Date

Shannon Ramsey-Chessman
Shannon Ramsey-Chessman Chief Operating Officer

7/15/18
Date

General Records Schedule GS1-SL for State and Local Government Agencies

DISBURSEMENT RECORDS: DETAIL

Item #340

This series consists of records documenting specific expenditures or transfers of agency moneys for the procurement of commodities and services and other purposes. The series may include, but is not limited to, procurement records such as requisitions, requisition logs, purchase orders, contracts, purchasing card (p-card) receipts, vendor invoices, receiving reports, acceptances of contract deliverables, approvals, and related documentation; and expenditure records for disbursements made through checks, warrants, electronic fund transfers (EFT), purchasing cards, or other methods, such as payment vouchers, approvals, check registers, canceled or voided checks, check stubs, canceled or voided warrants, disbursement ledgers, journal transactions, expenditure detail reports, refund records, and other accounts payable and related documentation. The series may also include a copy of the agency's sales tax exemption form. Retention is based on Section 95.11(2), *Florida Statutes*, Statute of Limitations on contracts, obligations, or liabilities. See also "DISBURSEMENT RECORDS: SUMMARY," "PURCHASING RECORDS," and "TRAVEL RECORDS."

RETENTION: 5 fiscal years after transaction completed.

DISBURSEMENT RECORDS: SUMMARY

Item #341

This series consists of records providing summary or aggregate documentation of expenditures or transfers of agency moneys for the procurement of commodities and services and other purposes. The series may include, but is not limited to, summary records such as trial balance reports, check logs and registers, summary expenditure reports, federal grant final closeout reports, summary journal transactions, and other accounts payable summary and related documentation. See also "DISBURSEMENT RECORDS: DETAIL."

RETENTION: 10 fiscal years.

DISCIPLINARY CASE FILES: EMPLOYEES

Item #98

This record series documents the investigation of allegations of employee misconduct and/or violation of department regulations or orders, state or federal statutes, or local ordinances. The series may include, but is not limited to, statements by the employee, witnesses, and the person filing the complaint. Cases include both formal and informal disciplinary proceedings relating to allegations that were determined as sustained, not sustained, unfounded, or exonerated. "Formal discipline" is defined as disciplinary action involving demotion, removal from office, suspension, or other similar action. "Informal discipline" is defined as any disciplinary action involving written and verbal reprimands, memoranda, or other similar action. These records are filed separately from the employee personnel file, but the final action summary becomes part of the personnel file. See also "EMPLOYEE CONDUCT COUNSELING RECORDS," "PERSONNEL RECORDS" items, and "STAFF ADMINISTRATION RECORDS."

RETENTION: 5 anniversary years after final action.

DOMESTIC PARTNERSHIP REGISTRY RECORDS

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RETENTION: Permanent.

DONATION RECORDS

Item #342

This record series documents donations of funds, property, historical documents, artifacts, or other items of long-term value or significance to a public agency or institution including, but not limited to, donations to the collections of cultural heritage institutions such as public archives and museums. The series may include, but is not limited to, correspondence; deeds of gift and/or other transfer documentation; description and/or value of item(s) donated; and documentation of the purpose of the donation and any limitations/restrictions on use. See also "ENDOWMENTS/BEQUESTS/TRUST FUND RECORDS."

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DRAFTS AND WORKING PAPERS

Item #242

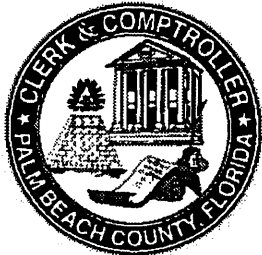
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DRUG TEST CASE FILES

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This record series documents drug testing of individuals under Florida's Drug-Free Workplace Act, or as required for Commercial Driver's License (CDL) or other drivers under U.S. Department of Transportation regulations. The case file may include, but is not limited to, documentation of decisions to administer reasonable suspicion or post-accident testing, or verifying the existence of a medical explanation of the inability of the driver to provide adequate breath or a urine specimen for testing; the employer's copy of a drug or alcohol test form, including the results of the test; a copy of the controlled substances test chain of custody control form; documents sent by the Medical Review Officer (MRO) to the



SHARON R. BOCK
Clerk & Comptroller
Palm Beach County

Memorandum

Date: July 9, 2018
From: Patricia Conceicao, Finance Department Records Management Coordinator
To: Stephen Weiss, Director, Finance Services, Board Services/Value Adjustment Board
Subject: Destruction of Finance Department Records

In the table below, you will find a listing of Finance Records from your department that are due for destruction. Attached you will find excerpts of the General Records Schedule for State and Local Government agencies that pertain to these records. As outlined below, this approval consists of Board County Commissioners Records totaling 46 boxes/69 cubic feet.

Schedule Item Number	Record Series Titles	Start/End Fiscal Year	Number of Boxes/Volume in Cubic Feet
GS11 Item # 16	VALUE ADJUSTMENT BOARD FILES: NO APPEAL FILED Record copy 4 anniversary years after final decision provided no appeal is filed in circuit court.	2013	46 boxes 69 cubic feet,

Please review the attachments and indicate your approval for this records destruction. Your signature on the approval form attests that, to the best of your knowledge, there are no unresolved (1) audit questions, (2) investigations, (3) civil suits pending, (4) pending/open public records requests, or (5) other reasons for delaying the destruction.

If the destruction is to be delayed, please state the reason below. Please return the completed package to the Finance Department Records Management Coordinator after signing.

If you should have any questions, please contact the Finance Department Records Management Coordinator. Thank you in advance for your assistance in this matter.

Reason for destruction delay



Stephen Weiss, Director, Finance Services, Board Services/Value Adjustment Board

7-9-18
Date



Shannon Ramsey-Chessman Chief Operating Officer

7/18/18
Date

General Records Schedule GS11 for Clerks of Court

Statutes, Statute of Limitations for actions on tax deeds.

RETENTION:

- a) Record copy. 4 anniversary years after tax deed recorded in Official Records.
- b) Duplicates. Retain until obsolete, superseded, or administrative value is lost.

TAX ROLLS

Item #75

This record series consists of the final paid tax roll submitted to the Clerk of the Circuit Court by the Tax Collector as provided in Department of Revenue Rule 12D-13.015(2)-(3), *Florida Administrative Code*, which requires that, "After the tax collector has completed collection of the taxes...he or she shall deliver the original tax roll to the clerk of the circuit court...The original tax roll may not be destroyed by the clerk of the court or any other officer or person until such time as written permission has been obtained from the Division of Archives, History and Records Management."

RETENTION:

- a) Record copy. Permanent.
- b) Duplicates. Retain until obsolete, superseded, or administrative value is lost.

TEEN COURT RECORDS

Item #13

This record series documents non-judicial hearings in a diversion/intervention program in which teenage offenders are "tried" by other teenagers. The series may include, but is not limited to, Probable Cause Affidavits; Civil Citations; Teen Court Program introductory letters to parents; letters to victims (restitution); victims' statements; waiver of rights; intake interview summaries; jury sentencing forms; contract agreements; verification of restitution (receipt); letter of apology/essay; TASC (Treatment Alternative for Street Crime) Assessment (Psychosocial Evaluation); community service or jury duty time sheets; successful completion reports (disposition forms); and Department of Juvenile Justice Recommendation to State Attorney's Office. This item *only* covers records from programs in counties in which the Teen Court program is administered by the county and not by the Judicial Branch.

RETENTION:

- a) Record copy. 5 anniversary years after child reaches the age of majority or final disposition, whichever occurs later.
- b) Duplicates. Retain until obsolete, superseded, or administrative value is lost.

VALUE ADJUSTMENT BOARD FILES: APPEAL FILED

Item #91

This record series consists of files created by the Clerk pursuant to Chapters 194 and 196, Florida Statutes, and Rule 12D-10.003(4)(a), *Florida Administrative Code*. This series may include, but is not limited to, the petition; hearing tapes and/or notes; recommendation of the Special Master; record of decision; notice of adjustment or disapproval; and supporting documents. FOR MINUTES OF THE VALUE ADJUSTMENT BOARD MEETINGS, SEE GS1-SL FOR STATE AND LOCAL GOVERNMENT AGENCIES, ITEM #32, "MINUTES: OFFICIAL MEETINGS."

RETENTION:

- a) Record copy. 5 anniversary years from final action if an appeal is filed in circuit court.
- b) Duplicates. Retain until obsolete, superseded, or administrative value is lost.

VALUE ADJUSTMENT BOARD FILES: NO APPEAL FILED

Item #16

This record series consists of files created by the Clerk pursuant to Chapters 194 and 196, Florida Statutes, and Rule 12D-10.003(4)(a), *Florida Administrative Code*. This series may include, but is not limited to, the petition; hearing tapes and/or notes; recommendation of the Special Master; record of decision; notice of adjustment or disapproval; and supporting documents. FOR MINUTES OF THE VALUE ADJUSTMENT BOARD MEETINGS, SEE GS1-SL FOR STATE AND LOCAL GOVERNMENT AGENCIES, ITEM #32, "MINUTES: OFFICIAL MEETINGS."

RETENTION:

- a) Record copy. 4 anniversary years after final decision provided no appeal is filed in circuit court.
- b) Duplicates. Retain until obsolete, superseded, or administrative value is lost.

WILLS: SAFEKEEPING

Item #72

This record series consists of original wills deposited with the Clerk pursuant to Section 732.901, Florida Statutes, Production of wills. The original will is removed from the safekeeping file and filed with all other pleadings if a probate case is actually filed.

RETENTION:

- a) Record copy. 20 calendar years after submitted.
- b) Duplicates. Retain until obsolete, superseded, or administrative value is lost.



CLERK TO THE
BOARD OF COUNTY COMMISSIONERS
Palm Beach County, Florida

DATE: April 17, 2018

TO: Patricia Conceicao
Finance Records Management/DRMC

FR: Steve Weiss, Director
Finance Services

RE: RECORDS DESTRUCTION REQUEST 2013

The following Value Adjustment Board records have been reviewed and have met and or exceeded the Florida Department of State's record retention requirement. We submit these documents for destruction approval.

BOX #	RECORD SERIES DESCRIPTION	RECORD DATE	SCANNED	GS1-L #	STATUTORY RETENTION PERIOD
1	VAB Hearings 2013 Hearing Rm Folders	09-30-13 10-02-13 10-07-13 10-30-13	n/a	#16	4 YRS
2	VAB Hearings 2013 Hearing Rm Folders	10-31-13 11-04-13 11-05-13	n/a	#16	4 YRS
3	VAB Hearings 2013 Hearing Rm Folders	11-06-13 11-07-13 11-12-13	n/a	#16	4 YRS
4	VAB Hearings 2013 Hearing Rm Folders	11-13-13	n/a	#16	4 YRS
5	VAB Hearings 2013 Hearing Rm Folders	11-14-13	n/a	#16	4 YRS

6	VAB Hearings 2013 Hearing Rm Folders	11-18-13 11-19-13 11-20-13	n/a	#16	4 YRS
7	VAB Hearings 2013 Hearing Rm Folders	11-21-13	n/a	#16	4 YRS
8	VAB Hearings 2013 Hearing Rm Folders	12-03-13	n/a	#16	4 YRS
9	VAB Hearings 2013 Hearing Rm Folders	12-04-13	n/a	#16	4 YRS
10	VAB Hearings 2013 Hearing Rm Folders	12-05-13	n/a	#16	4 YRS
11	VAB Hearings 2013 Hearing Rm Folders	12-12-13	n/a	#16	4 YRS
12	VAB Hearings 2013 Hearing Rm Folders	12-17-13 12-18-13 12-19-13	n/a	#16	4 YRS
13	VAB Hearings 2013 Hearing Rm Folders	01-07-14 01-13-14 01-14-14* (box 1 / 2)* 01-15-14	n/a	#16	4 YRS
14	VAB Hearings 2013 Hearing Rm Folders	01-14-14 (box 2 / 2)	n/a	#16	4 YRS
15	VAB Hearings 2013 Hearing Rm Folders	01-16-14	n/a	#16	4 YRS
16	VAB Hearings 2013 Hearing Rm Folders	01-21-14 01-22-14	n/a	#16	4 YRS
17	VAB Hearings 2013 Hearing Rm Folders	01-23-14	n/a	#16	4 YRS
18	VAB Hearings 2013 Hearing Rm Folders	01-27-14 01-29-14	n/a	#16	4 YRS
19	VAB Hearings 2013 Hearing Rm Folders	01-30-14 (box 1 / 2)	n/a	#16	4 YRS
20	VAB Hearings 2013 Hearing Rm Folders	01-30-14 (box 2 / 2)	n/a	#16	4 YRS
21	VAB Hearings 2013 Hearing Rm Folders	02-05-14	n/a	#16	4 YRS
22	VAB Hearings 2013 Hearing Rm Folders	02-06-14	n/a	#16	4 YRS
23	VAB Hearings 2013 Hearing Rm Folders	02-10-14 02-12-14	n/a	#16	4 YRS
24	VAB Hearings 2013 Hearing Rm Folders	02-13-14	n/a	#16	4 YRS
25	VAB Hearings 2013 Hearing Rm Folders	02-18-14 02-19-14	n/a	#16	4 YRS
26	VAB Hearings 2013 Hearing Rm Folders	02-20-14 (box 1 / 2)	n/a	#16	4 YRS

27	VAB Hearings 2013 Hearing Rm Folders	02-20-14 (box 2 / 2)	n/a	#16	4 YRS
28	VAB Hearings 2013 Hearing Rm Folders	02-26-14	n/a	#16	4 YRS
29	VAB Hearings 2013 Hearing Rm Folders	02-27-14 03-05-14	n/a	#16	4 YRS
30	VAB Hearings 2013 Hearing Rm Folders	03-06-14	n/a	#16	4 YRS
31	VAB Hearings 2013 Hearing Rm Folders	03-12-14 03-13-14* (box 1 / 2)*	n/a	#16	4 YRS
32	VAB Hearings 2013 Hearing Rm Folders	03-13-14 (box 2 / 2)	n/a	#16	4 YRS
33	VAB Hearings 2013 Hearing Rm Folders	03-20-14 (box 1 / 2)	n/a	#16	4 YRS
34	VAB Hearings 2013 Hearing Rm Folders	03-20-14 (box 2 / 2)	n/a	#16	4 YRS
35	VAB Hearings 2013 Hearing Rm Folders	03-26-14 03-27-14	n/a	#16	4 YRS
36	VAB Hearings 2013 Hearing Rm Folders	04-03-14	n/a	#16	4 YRS
37	VAB Hearings 2013 Hearing Rm Folders	04-10-14	n/a	#16	4 YRS
38	VAB Hearings 2013 Hearing Rm Folders	04-30-14 05-01-14	n/a	#16	4 YRS
39	2013 VAB Petition Withdrawals/Settles	00001-00694	n/a	#16	4 YRS
40	2013 VAB Petition Withdrawals/Settles	00700-01699	n/a	#16	4 YRS
41	2013 VAB Petitions Withdrawals/Settles	01700-02599	n/a	#16	4 YRS
42	2013 VAB Petitions Withdrawals/Settles	02600-03895	n/a	#16	4 YRS
43	2013 VAB Petitions Withdrawals/Settles	03900-04906	n/a	#16	4 YRS
44	2013 VAB Reports Daily Transaction Rpts.	n/a	n/a	#16	4 YRS
45	2013 VAB Special Magistrates Billing/rating sheets, supporting documents, etc.	n/a	n/a	#16	4 YRS
46	2013 VAB Reschedules, returned mail, misc.	n/a	n/a	#16	4 YRS