

RECORDS RETENTION SCHEDULE  
 APPROVAL REQUEST

2/11/99

Submit three copies with three copies of the  
 Records Retention Schedule, STD. 73.

(1) DEPARTMENT, BOARD OR COMMISSION  
 Board of Equalization  
 DIVISION, BUREAU OR OTHER UNIT  
 Sales & Use Tax Department-  
 ADDRESS  
 Operations  
 450 N Street, Sacramento, CA 95814

O: DEPARTMENT OF GENERAL SERVICES  
 OFFICE OF INFORMATION SERVICES  
 1500 5th Street, Room 116  
 Sacramento, CA 95814 (or IMS C-39)

CHECK THE APPROPRIATE BOX:  
 New schedule of records that have never been scheduled. (Complete boxes 5 - 8.)  
 Revising a previous schedule. (Complete boxes 5 - 12.)  
 Amending some pages of a previous schedule. (Complete boxes 8 - 12.)  
 (The original approval number will remain in effect.)

(916) 445-2294 or CALNET 485-2294	(5) SCHEDULE NUMBER	(4) SCHEDULE DATE	(7) NUMBER OF PAGES	(9) CUBIC FEET (Total Schedule)
NEW SCHEDULE INFORMATION (if applicable)	10-E	August 26, 1998	2	88.31
PREVIOUS SCHEDULE INFORMATION (if applicable)	(9) SCHEDULE NUMBER(S)	(10) APPROVAL NUMBER(S)	(11) APPROVAL DATE(S)	(12) PAGE NUMBER(S) REVISED
10-E	94-117	06/15/94	2	2

PART I -- AGENCY STATEMENTS

As the program manager (or person authorized to sign for the program manager) directly responsible for the records listed on the attached schedule, I certify that all records are listed, that I have reviewed the need for the records, (per Section 1611 of the State Administrative Manual) that each retention period is necessary and correct as scheduled, and (for a revised schedule) that all items on the previous schedule have been accounted for.

(8) SIGNATURE-MANAGER DIRECTLY RESPONSIBLE FOR THE RECORDS  
*DeLoan*  
 (14) TITLE  
 RMO  
 (15) DATE SIGNED  
 2/3/99

In accordance with Government Code 14755, approval of the attached Records Retention Schedule by the Department of General Services is hereby requested. Retention periods have been established by this agency after a careful evaluation of all the factors listed in Section 1667 of the State Administrative Manual.

I hereby certify that I am authorized to act on behalf of the head of this agency in matters pertaining to the retention and disposal of records. (Per Section 1611 of the State Administrative Manual.)

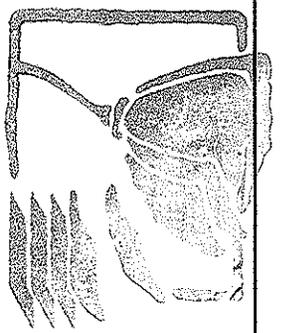
(6) SIGNATURE-RECORDS MANAGEMENT ANALYST  
*Rodney Palmer*  
 (17) TITLE  
 RMC  
 (18) NAME (Printed or Typed)  
 Rodney Palmer  
 (19) TELEPHONE  
 445-3593  
 (20) DATE SIGNED  
 11/17/98

PART II -- DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)  
 (21) SIGNATURE-OIS CONSULTANT  
*Ramona M. Hastings*  
 (22) APPROVAL NUMBER  
 98-261  
 (23) TITLE  
 Records Management Consultant  
 (24) DATE SIGNED  
 12/28/98

PART III -- ARCHIVAL SELECTION (Per Government Code Section 14755)

THE ATTACHED RECORDS RETENTION SCHEDULE:

- Contains no material subject to further review by the California State Archives
- Contains material subject to archival review. Items stamped "Hold/Notify Archives" may not be destroyed without clearance by the Secretary of State. (Per Section 1614 of the State Administrative Manual.)



(25) SIGNATURE-CHIEF OF ARCHIVES  
*Carl A*  
 (26) DATE SIGNED  
 FEB 3 1999  
 CALIFORNIA STATE ARCHIVES

State of California

DEPARTMENT (1) <b>Board of Equalization</b>		SCHEDULE NUMBER (2) <b>10-E</b>	DATE (3) <b>AUGUST 26, 1998</b>
ORGANIZATIONAL UNIT <b>Sales &amp; Use Tax Admin./Assistant Chief of Field Operations</b>		PAGE <b>1</b>	OF PAGES <b>2</b>
ADDRESS (Number <b>450</b> )	Street <b>N</b>	City) <b>Sacramento, CA 95814</b>	DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5) <b>8028</b>

**Records Retention Schedule**

STD. 73 (REV. 5-92)  
See Instructions on reverse and in SAM 1600

Item Number (Triple Space Between Items) (6)	Cubic Feet* (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS (Triple space between Items) (9)	M E D I A L (10)	V I T A L (11)	RETENTION				PRA (Exempt & IPA) (16)	REMARKS
						Office (12)	Dept. (13)	SRC (14)	Total (15)		

**Mission:** The mission of the Sales and Use Tax Administration is to provide timely and informative services to taxpayers concerning the business tax laws administered by the Board; and to provide fair, firm and uniform treatment of taxpayers in the administration and collection of business taxes; and to perform these functions efficiently, effectively and with maximum quality.

<u>Assistant Chief of Field Operations</u>												
1.	32.3	<i>Not / Not / Not</i>	Subject Files and Correspondence	P		5				5		
2.	20.0		Confidential Files - <i>criminal cases, employee investigations, internal audit - security reports.</i>	P		5				5		Public Records Act. Government Code 6254
3.	0		Binders: CPPM, BEAM, SAM, Audit Manuals, etc.	P								These are not records. They are copies of manuals generated in other offices.
<u>Administrative Assistant to Chief of Field Operations</u>												
4.	23.0	<i>Not / Not / Not</i>	Subject Files and Correspondence	P		5				5		
5.	3.0		District Requisitions					<i>Curr +1</i>			<i>Curr +1</i>	<i>current until superseded.</i>
<u>Technical Advisor to Chief of Field Operations</u>												
6.	5.5	<i>Not / Not / Not</i>	Subject Files and Correspondence.	P		5				5		

\* Provide total of office and departmental

08/26/98

State of California

DEPARTMENT (1) <b>Board of Equalization</b>		SCHEDULE NUMBER (2) <b>10-E</b>	DATE (3) <b>AUGUST 26, 1998</b>
ORGANIZATIONAL UNIT <b>Sales &amp; Use Tax Admin./Assistant Chief of Field Operations</b>		PAGE <b>2</b>	OF PAGES <b>2</b>
ADDRESS (Number <b>450</b> )	Street <b>N</b>	City) <b>Sacramento, CA 95814</b>	
			DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5) <b>73-261</b>

**Records Retention Schedule**

STD. 73 (REV. 5-92)

See Instructions on reverse and in SAM 1600

Item Number (Triple Space Between Items) (6)	Cubic Feet* (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS (Triple space between items) (9)	M E D I A L (10)	V I T A L (11)	RETENTION				PRA (Exempt) & IPA (16)	REMARKS
						Office (12)	Dept. (13)	SRC (14)	Total (15)		
			<u>Staff Service Analyst</u>								
7.	3.0		Subject Files and Correspondence	P		5			5		
			<u>Secretary</u>								
8.	1.5		Confidential Files -- Personnel	P		5			5		Time and Attendance records -- confidential destruct. Purged after five years.
9.	.01		<u>RECORDS MANAGEMENT</u> Records retention schedule approval request, records retention schedule Std. 70 & Std. 73	P		Curr.			Curr.		Current until superseded.
<b>Total Cu. Ft.</b>	<b>88.3</b>										
			Curr. = Current.								

\* Provide total of office and departmental