

RECORDS RETENTION SCHEDULE

(1) DEPARTMENT, BOARD OR COMMISSION Board of Equalization, Sales and Use Tax Department		(2) AGENCY BILLING CODE 24450	(3) PAGE 1 OF 2 PAGES	
(4) DIVISION/ BRANCH/ SECTION Sales and Use Tax Administration- Field Operations Division		(5) ADDRESS 450 N Street, Sacramento, CA MIC:46		
CHECK THE APPROPRIATE BOX				
(6) <input type="checkbox"/> New schedule of records that have never been scheduled. [Complete boxes (9)–(12)]				
(7) <input checked="" type="checkbox"/> Revising a previous schedule. [Complete boxes (9)–(16)] (A new approval number will be assigned.)				
(8) <input type="checkbox"/> Amending some pages of a previous schedule. [Complete boxes (13)–(16)] (The original approval number will remain in effect.)				
NEW SCHEDULE INFORMATION (If applicable)	(9) SCHEDULE NUMBER 10K	(10) SCHEDULE DATE 10/30/2012	(11) NUMBER OF PAGES 2	(12) CUBIC FEET (Total Schedule) 49
PREVIOUS SCHEDULE INFORMATION (If applicable)	(13) SCHEDULE NUMBER 10AA	(14) APPROVAL NUMBER 06-118	(15) APPROVAL DATE(S) 6/20/2006	(16) PAGE NUMBER(S) REVISED 2
(17) MISSION/FUNCTIONAL STATEMENT The mission of Sales and Use Tax Department is to serve the public through fair, effective and efficient administration of the Sales and Use Tax Program.				
PART I – AGENCY STATEMENTS				
As the program manager (or person authorized to sign for the program manager) directly responsible for the records listed on this records retention schedule, I certify that all records listed are necessary and that each retention period is correct. For revisions, all items on the previous schedule are included or accounted for on the recapitulation. Vital records identified by this schedule are protected. If protection is not currently provided but plans are underway, the details of such plans are shown in Column 48, Remarks.				
(18) SIGNATURE – MANAGER RESPONSIBLE FOR THE RECORDS Stephen Rudd		(19) TITLE Chief of Field Operations Division	(20) PHONE NUMBER 916-322-4889	(21) DATE SIGNED 10/12/12
In accordance with Government Code 14755, approval of this Records Retention Schedule by the Department of General Services is hereby requested. Retention periods shown have been established in accordance with the criteria set forth by Section 1667 of the State Administrative Manual.				
(22) SIGNATURE – RECORDS MGMT. ANALYST Marissa Kubo-Fernandez		(23) CLASSIFICATION AGPA	(24) NAME (Printed or Typed) Marissa Kubo-Fernandez	(25) PHONE NUMBER 916 323-6341
(26) DATE SIGNED 10/22/12				
PART II – DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)				
(27) SIGNATURE – CALRIM CONSULTANT Ramona M. Gutierrez		(28) APPROVAL NUMBER 12 216	(29) DATE SIGNED 11/5/2012	(30) EXPIRATION DATE 11/5/2017
PART III – ARCHIVAL SELECTION (Per Government Code Section 14755)				
THE ATTACHED RECORDS RETENTION SCHEDULE:			FOR ARCHIVES' STAMP	
(31) <input checked="" type="checkbox"/> Contains no material subject to further review by the California State Archives			 KEY 33166 CALIFORNIA STATE ARCHIVES	
(32) <input type="checkbox"/> Contains material subject to archival review. Items stamped "NOTIFY ARCHIVES" may not be destroyed without clearance by the California State Archives. (Per Section 1671 of the State Administrative Manual.)				
(33) SIGNATURE – CHIEF OF ARCHIVES OR DESIGNATED REPRESENTATIVE Andrew Hyslop		(34) DATE SIGNED 11/15/2012		

RECORDS RETENTION SCHEDULE

(35) CalRIM APPROVAL NUMBER							(36) PAGE 2 OF 2					
ITEM #	CUBIC FEET *	CA. STATE ARCHIVES USE ONLY	TITLE AND DESCRIPTION OF RECORDS <i>(Double spaces between items)</i>	MEDIA	VITAL	RETENTION				PRA (Exempt) & IPA	REMARKS	PAGES
						OFFICE	DEPT.	SRC	TOTAL			
(37)	(38)	(39)	(40)	(41)	(42)	(43)	(44)	(45)	(46)	(47)	(48)	
1	4		Confidential District Files	P		Active			Active		Consolidated files from Districts 1-4 and Out-Of-State District. Retained for 3 years and then go to confidential destruction.	
2	7		Confidential District Personnel Files	P		Active			Active		Consolidated files from Districts 1-4 and Out-Of-State District. Retained for 3 years and then go to confidential destruction.	
3	2		Confidential Chrons Files	P		Active +3			Active		Consolidated files from Districts 1-4 and Out-Of-State District. Retained for 3 years and then go to confidential destruction.	
4	5		Executive Secretary Files	P		Active			Active		Unit Personnel records	
5	31		Field Operations Subject Files	P		Active +3			Active +3		Consolidated files from Districts 1-4 and Out-Of-State District. Retained for 3 years and then go to confidential destruction. +	
TOTAL									49			

* Provide total of office and departmental

