

REQUEST FOR APPROVAL OF RECORDS RETENTION SCHEDULE
 STD. 72 (REV. 8/87)

DEPARTMENT, BOARD OR COMMISSION	Board of Equalization	BILLING CODE	24399
DIVISION, BUREAU OR OTHER UNIT	Legal Section	CUBIC FEET (Total Schedule)	1793.1

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

ADDRESS	1020 N Street, Sacramento		
SCHEDULE NUMBER	PAGE NUMBER(S)	SCHEDULE DATE	
I-C	3	7-28-88	

TO: (1) DEPARTMENT OF GENERAL SERVICES
 OFFICE OF RECORDS MANAGEMENT

IF THIS IS A REVISION OF AN EXISTING SCHEDULE (including addition or deletion of pages), enter the following information from the EXISTING schedule:

(2) CHIEF, STATE ARCHIVES	1020 "O" Street, Room 130 Sacramento, CA 95814 445-4293 or ATSS 485-4293	
SCHEDULE NUMBER	PAGE NUMBER(S)	SCHEDULE DATE
I-C	2	11-1-83
APPROVAL NUMBER	APPROVAL DATE	
85-031	1-17-85	

- Check this box to indicate ALL items in the schedule have been reviewed. (A new approval number will be assigned.)
- Check this box to indicate only certain items in this schedule have been reviewed for revision, addition, or deletion. (The original approval number will remain in effect.)

PART I — AGENCY STATEMENTS

As the program manager directly responsible for the records listed on the attached schedule, I certify that I have reviewed the need for the records, 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.

SIGNATURE—MANAGER DIRECTLY RESPONSIBLE FOR THE RECORDS: *Randy Owyang* TITLE: Chief Counsel DATE: 7/29/88

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 for the head of this agency in matters pertaining to the retention and disposal of records. (Per Section 1611 of the State Administrative Manual.)

SIGNATURE—RECORDS MANAGEMENT COORDINATOR

Beverly D. Burns for Carl Allen
 TITLE: Chief, Management Analysis Section DATE: September 30, 1988 TELEPHONE: (916) 455-5878

PART II — DEPARTMENT OF GENERAL SERVICES APPROVAL (Per Government Code Section 14755)

The Department of General Services has no jurisdiction over entries made in Column 16 of STD. Form 73. Our approval covers Columns 1 — 15 and 17 only.

SIGNATURE: *Randy Owyang* APPROVAL NUMBER: 88-436

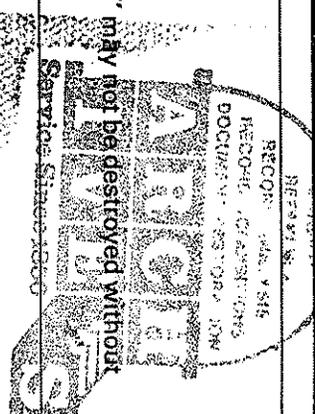
TITLE: *Statewide Records Mgt Officer* DATE: 11/4/88

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. (State Administrative Manual Section 1614.)

SIGNATURE—CHIEF OF ARCHIVES: *John F. Burns* DATE: NOV 28 1988



RECORDS RETENTION SCHEDULE

STD. 73 (REV. 5-85)

See instructions on reverse
and in SAM 1600

DEPARTMENT (1) Board of Equalization		SCHEDULE NUMBER (2) I-C	DATE (3) 7/28/88
ORGANIZATIONAL UNIT Legal Section		PAGE 1	OF PAGES (4) 3
ADDRESS (number, street, city) 1020 "N" Street, Sacramento		DEPARTMENT OF GENERAL SERVICES APPROVAL NUMBER (5)	

ITEM NUMBER (6)	CUBIC FEET (7)	CALIFORNIA STATE ARCHIVES USE ONLY (8)	TITLE AND DESCRIPTION OF RECORDS (9)	Media (10)	Vital (11)	RETENTION				PRA (Exempt) & IPA (16)	REMARKS (17)
						OFFICE (12)	DEPT. (13)	SRC (14)	TOTAL (15)		
1	25	County Archives	Hearing reports, hearing	P		3			3	X	Exemption: Sec. 15619, Gov. Code. Destruction: Confidential.
2	14.7	County Archives	Miscellaneous correspondence pertaining to hearings	P		3			3	X	Exemption: Sec. 15619, Gov. Code. Destruction: Confidential.
3	4.8		Personnel Files	P	Active	13			Active +3	X	Active until employee separates. Exemption: Sec. 6254, Gov. Code. Sec. 1798.34 Civil Code. Destruction: Confidential.
4	1347.5		Correspondence, rulings, reports, memoranda and docus. which constitute legal precedent in property taxes, business taxes and general administration	P	Current				Current	X	Subject to annual review and only retained until superseded by more recent legal decisions or opinions or until precedent value is lost by a change in the law. Exemption: Sec. 6254, Gov. Code. Destruction: Confidential.

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						OFFICE (12)	DEPT. (13)	SRC (14)	TOTAL (15)		
5	15.1		Information and Records - material relating to confidentiality, privacy and personnel	P		Current			Current	X	Subject to annual review and only retained until superseded or made obsolete by a change in the law. Destruction: Confidential. Exemption: Sec. 6254 (a) & (k), Gov. Code. Sec. 7056, Rev. & Tax. Code. Sec. 954, Evidence Code
6	97.3		Litigation material	P		Active			Active	X	Active until litigation is completed. Exemption: Sec. 6254, Gov. Code. Destruction: Confidential
7	2.2		Supoena files	P		Active			Active	X	Active until litigation is completed. Exemption: Sec. 15619, Gov. Code. Destruction: Confidential
8	128.1		Franchise and income tax and senior citizens property tax assistance appeals, briefs, correspondence, exhibits, hearing transcripts, and opinions and orders filed therein. Appeals disposed of by:	P						X	Upon disposition, the original signed opinions of the Board will be removed from the file and transferred to archives. Miscellaneous correspondence regarding these laws not taken as appeals and chronies also are retained one year. Exemption: Sec. 15619, Gov. Code. Destruction: Confidential.
			(a) Opinions	P		2			2	X	
			(b) Dismissals	P		1+			1+	X	

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DEPARTMENT (1) Board of Equalization	SCHEDULE NUMBER (2) I-C	DATE (3) 7/28/88
ORGANIZATIONAL UNIT Legal Section	PAGE 3	OF 3 PAGES (4)
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						OFFICE (12)	DEPT. (13)	SRC (14)	TOTAL (15)		
9	158.4		Rulemaking Files	P	X	Perm.			Perm.		Retained for research and historical value.