

FLORIDA DEPARTMENT *of* STATE



DIVISION OF
LIBRARY and
INFORMATION SERVICES

Records Management: It's Everyone's Job!



My Job? Why?

Effective records management allows agencies to **maintain and locate** records from the **time of creation or receipt to final disposition**:

- Reduce unnecessary records.
- Spend less on records storage.
 - Space (onsite, offsite, electronic).
 - Materials.
- Improve access to records.
- Minimize premature destruction of records.
- Identify and protect vital and historical/archival records.
- Potentially reduce legal costs by **complying with Florida law**.



Did You Say . . . Law?

Chapter 119, *Florida Statutes*, Public Records:

- Defines the term “**public records.**” 119.011(4), F.S.
 - “Public records” means all documents, papers, letters, maps, books, tapes, photographs, films, sound recordings, data processing software, or other material, regardless of the physical form, characteristics, or means of transmission, made or received pursuant to law or ordinance or in connection with the transaction of official business by any agency.
- Establishes the **right of the public to inspect records** unless there is an exemption or restriction. 119.07, F.S.
- Dictates that **agencies must comply** with the retention and disposition rules adopted by the Division of Library and Information Services. 119.021(2)(b), F.S.

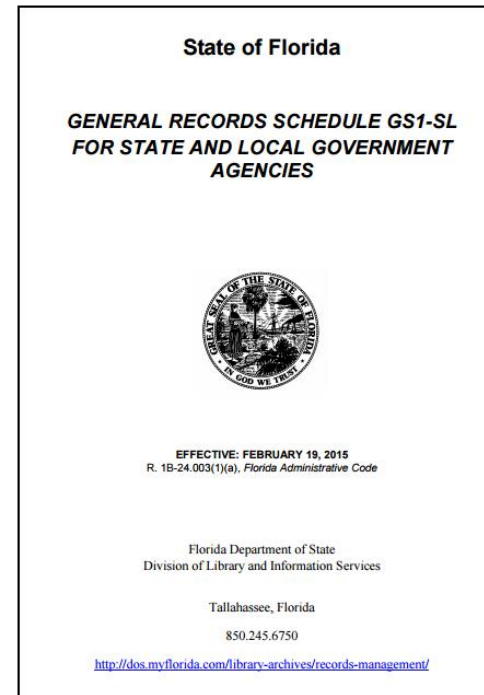
Public Records

- Are created or received in **connection with agency business**.
- Are defined by their **content**, not their format.
- Can be **open to inspection OR restricted** by law.
- Must be **retained for the minimum retention period** set by the Division of Library and Information Services.

Retention Period?

This is the **length of time** you are required to retain each of the different categories of records in your agency before you can legally dispose of them.

Retention periods for **most** of your agency's records will be covered by a record series ("item") in the general records schedules.



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

RECORDS RETENTION SCHEDULES

Item #	Description
Item #189	CONTROL RECORDS series consists of records pertaining to employee or contractor access to a facility or resource (e.g., office area, parking facility, computer network) including, but not limited to, arrival/departure data, key records, identification badge records, parking assignment records, network account and permission records, etc. DO NOT include records relating to visitors, such as visitor logs or visitor badges. RETENTION: 1 anniversary year after superseded or employee separates from employment.
Item #244	CONSTRUCTION HEARING CASE FILES: BUILDING CODE BOARD (COMMERCIAL) series consists of case files documenting approval or denial of requests to construct or modify a structure in conformance with the building code. RETENTION: 10 anniversary years after case closed, whichever is later.
Item #331	CONSTRUCTION HEARING CASE FILES: BUILDING CODE BOARD (RESIDENTIAL) series consists of case files documenting approval or denial of requests to construct or modify a structure in conformance with the building code. RETENTION: 10 anniversary years after case closed.
Item #2	DUPLICATE CONVENIENCE RECORDS series consists of DUPLICATES of correspondence, reports, publications, memoranda, etc., maintained for use of officials and employees in carrying out their duties. The material filed in this series is NOT the official copy. DO NOT use this item if records fall under a more appropriate retention schedule item. RETENTION: Retain until obsolete, superseded, or administrative value is lost.
Item #3	INTERNAL SUPPORT RECORDS series consists of records relating to internal administrative activities rather than the functions for which the records are maintained. These records document day-to-day office management and do not serve as official documentation of office activities. Examples are an individual's daily activity tracking log used to complete periodic activity reports; sign-up sheets of office equipment or facilities (e.g., reserving a meeting room); and records documenting operating and use of staff library. DO NOT use this item if records fall under a more appropriate retention schedule item or if the content/requirements of the records necessitate that an individual retention schedule be used. For instance, use Budget Records: Supporting Documents for budget work papers, or use Purchasing Records relating to purchase of office supplies, etc. RETENTION: Retain until obsolete, superseded, or administrative value is lost.
Item #122	AGENCY RECORDS: AGENCY DIRECTOR/PROGRAM MANAGER series consists of records documenting the substantive actions of elected or appointed program managers or directors. These records constitute the official record of an agency's performance of its functions and formulation of program initiatives. This series may include various types of records, such as: correspondence; statements prepared for delivery at meetings, conventions, or other public functions that are designed to promote departmental programs, activities, and policies; interviews, and reports concerning agency development and implementation. See also "CORRESPONDENCE AND MEMORANDA, PROGRAM AND DEVELOPMENT," "DIRECTIVES/POLICIES/PROCEDURES," and "SUBJECT REFERENCE FILES." These records have archival value. RETENTION: 10 anniversary years; State agencies must contact the State Archives of Florida for archival review and disposition of records. Other agencies should ensure appropriate preservation of records determined to have historical value.
Item #25	ADVERTISEMENTS: LEGAL series consists of advertisements which have appeared in newspapers or other publications as stipulated in §11, Florida Statutes, (where and in what language legal notices to be published) or in the "Administrative Advertising Matters" pertaining to the agency and other legal advertisements which may directly or indirectly affect the agency, but not including advertisements for construction jobs, public hearings or notices, and public sales. A legal advertisement is frequently filed with the item to which it applies. RETENTION: 5 fiscal years.
Item #82	AFFIRMATIVE ACTION RECORDS This record series consists of records relating to an agency's affirmative action plan, including reports submitted to the Equal Employment Opportunity Commission (EEOC), discrimination complaints, correspondence, and investigation.

General Records Schedules

GS1-SL State and Local Government Agencies

GS2 Law Enforcement, Correctional Facilities and District Medical Examiners

GS3 Election Records

GS4 Public Health Care Facilities and Providers

GS5 Public Universities and Colleges

GS7 Public Schools Pre-K-12 and Adult and Career Education

GS8 Fire Department Records

GS9 State Attorneys

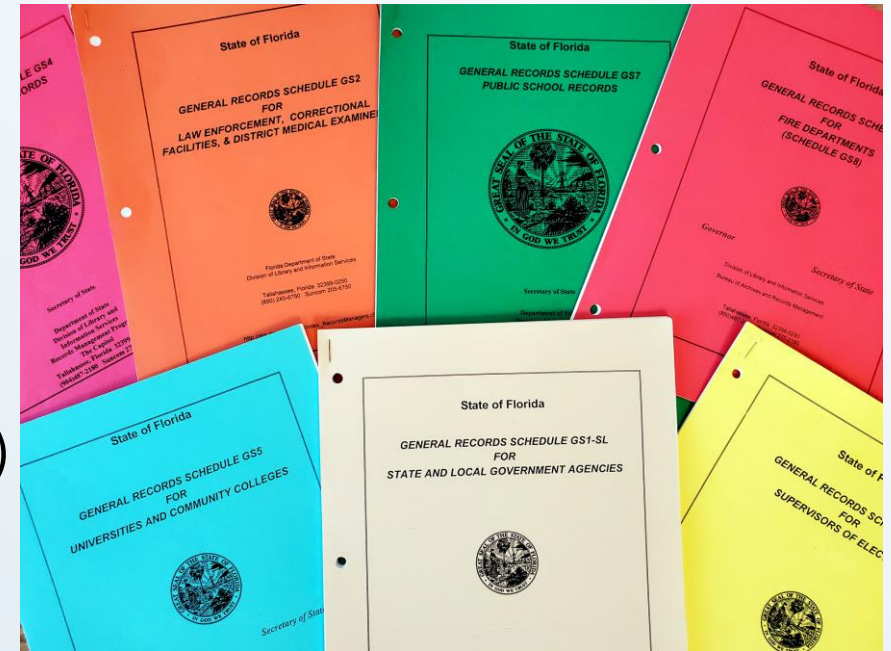
GS11 Clerks of Court Records (*only* county administrative records)

GS12 Property Appraisers

GS13 Tax Collectors

GS14 Public Utilities

GS15 Public Libraries



*The GS6 and GS10 are no longer in use

Record Series

A **record series** is a grouping of related public records that document the same agency program or activity.

Each record series is described by **four elements**:

Record series title	EQUIPMENT/VEHICLE USAGE RECORDS	Item #224	Item number
Description	This record series documents use of agency equipment and vehicles, including, but not limited to, vehicle logs indicating driver, destination, fuel/service stops, and odometer readings and/or total trip mileage; equipment usage logs and/or reports; and other usage documentation.		
Retention	RETENTION: 1 calendar year.		

Record Series Examples

GS1-SL – State and Local Agencies

- **Attendance and Leave Records** Item #116.
- **Financial Transaction Records: Detail** Item #435.
- **Grant Files** Item #422.
- **Training Material Records** Item #147.

GS15 – Public Libraries

- **Acquisition Records** Item #1.
- **Catalog Records** Item #3.
- **Circulation Records** Item #4.
- **Reference Request Records** Item #9.

RECORDS RETENTION SCHEDULES

ACCESS CONTROL RECORDS

Item #189

This record series consists of records pertaining to employee, contractor or subscriber access to a facility or resource (e.g., office building, secure office area, parking facility, computer network) including, but not limited to, arrival/departure data, key assignment records, identification badge records, parking assignment records, network account and permission records, etc. This series does not include records relating to visitors, such as visitor logs or visitor badges. See also "VISITOR/ENTRY RECORDS."

RETENTION: 1 anniversary year after superseded or access rights terminated.

ADDRESS REQUEST RECORDS

Item #415

This record series consists of requests for addresses for properties that previously did not have an address assigned to them. The series includes an address request form providing such information as name of person making request, identifying information regarding the parcel and subdivision, and the type of address requested (residential, commercial, other). The series may also include supporting documentation such as copies of site maps and floor plans.

RETENTION: 5 fiscal years.

ADJUSTMENT HEARING CASE FILES: BUILDING CODE BOARD (COMMERCIAL)

Item #244

This record series consists of case files documenting approval or denial of requests to construct or modify a commercial structure in a manner not in conformance with the building code.

RETENTION: Retain for life of structure OR 10 anniversary years after case closed, whichever is later.

ADJUSTMENT HEARING CASE FILES: BUILDING CODE BOARD (RESIDENTIAL)

Item #331

This record series consists of case files documenting approval or denial of requests to construct or modify a residential structure in a manner not in conformance with the building code.

RETENTION: 10 anniversary years after case closed.

ADMINISTRATIVE CONVENIENCE RECORDS

Item #2

This record series consists of **DUPLICATES** of public records maintained for the convenience of officials and employees in carrying out their duties. These records are **NOT** the official file or record (master) copy. **Do NOT use this item if records fall under a more appropriate retention schedule item.**

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

Example from the
GS1-SL

GENERAL SCHEDULE FOR PUBLIC LIBRARIES GS15

ACQUISITION RECORDS

Item 1

This record series consists of records relating to the acquisition of library materials including, but not limited to books, periodicals, software, compact discs, videotapes, audiotapes, and film. These records may include the accession date, publisher and cost, date entered into or removed from the collection, and method of final disposal.

RETENTION:

- a) Record copy. 3 fiscal years provided applicable audits have been released.
- b) Duplicates. Retain until obsolete, superseded or administrative value is lost.

ANNUAL REPORTS

Item 2

This record series consists of annual library reports relating to library statistics on expenditures, circulation, attendance, print and non-print inventory, services and/or programs and other pertinent information.

RETENTION:

- a) Record copy. 3 fiscal years provided applicable audits have been released.
- b) Duplicates. Retain until obsolete, superseded or administrative value is lost.

CATALOG RECORDS

Item 3

This record series consists of electronic or physical records identifying and describing books and other materials in library collections.

RETENTION:

- a) Record copy. Retain for life of material.
- b) Duplicates. Retain until obsolete, superseded or administrative value is lost.

CIRCULATION RECORDS

Item 4

This record series consists of physical or electronic records of the loan of materials to library users, including records of overdue or delinquent materials.

RETENTION:

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

EQUIPMENT USE RECORDS

Item 5

This record series consists of records of the loan or use of library equipment by the public and may include the loan or use of public access computers, DVD or video tape players, cassette tape recorders and film projectors.

RETENTION:

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

FINES AND REPLACEMENT CHARGE RECORDS

Item 6

This record series consists of records relating to payments for fines and replaced library materials and may include records relating to the withdrawal of materials from the inventory or catalog.

RETENTION:

- a) Record copy. 3 fiscal years provided applicable audits have been released.
- b) Duplicates. Retain until obsolete, superseded or administrative value is lost.

INTERLIBRARY LOAN REQUEST RECORDS

Item 7

This record series consists of physical or electronic forms used by a library to request the loan of books or materials from another library.

RETENTION:

- a) Record copy. Retain until transaction has been completed.
- b) Duplicates. Retain until obsolete, superseded or administrative value is lost.

Example from the
GS15

Due for update – your
input welcome!!!



Individual Agency Retention Schedules

Request from us if you have records not covered in a general schedule.

STATE OF FLORIDA DEPARTMENT OF STATE Division of Library and Information Services Form LSE10SR2-09 Rule 1B-24.003, F.A.C.		Department of State Use Only SCHEDULE NO. _____ Agency No. _____ <input type="checkbox"/> New Schedule <input type="checkbox"/> Revise Existing Schd # _____	
Request for RECORDS RETENTION SCHEDULE			
Agency Information			
1. Agency Name: _____ Division: _____ Bureau: _____		2. RMLO Contact Information Name: _____ Phone: _____ E-mail: _____ Address: _____	
3. Custodian Name: _____ Phone: _____			
Record Series Information			
Retention schedules are established for record series, regardless of media or format. A record series 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.			
4. Proposed Record Series Title. Provide a brief phrase summarizing the form, function and/or subject of the records, without using agency jargon or abbreviations. _____			
5. Record Series Description. Provide a general description of the record series, including its purpose and use. This information should enable someone not familiar with the record series to identify it and understand its contents. Please attach any related forms or other documentation. _____			
6. What is the primary purpose of this record series? <input checked="" type="checkbox"/> Administrative <input type="checkbox"/> Legal <input type="checkbox"/> Fiscal Is this record series subject to audit? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No List any federal, state, or local statutes, laws, ordinances, rules or other legal or regulatory requirements specifically relating to this record series. Please attach copies, if available. _____			
Agency Recommended Retention			
7. Based on your agency's knowledge of the record series and its function, what is your agency's recommended retention period? Record Copy: _____ Duplicate Copies: _____			
Agency Authorization			
8. Authorized by: _____ Signature _____ Title _____ Date _____			
PLEASE SUBMIT TO: Florida Department of State State Library and Archives of Florida Mail Station 9A Tallahassee, Florida 32399-0250			
Please note that this is a retention schedule request and that the schedule is not available for use until reviewed and approved by the Department of State. You will be notified when this review is complete.			

STATE OF FLORIDA DEPARTMENT OF STATE Division of Library and Information Services Form LSE10SR2-09 Rule 1B-24.003, F.A.C.		RECORDS RETENTION SCHEDULE <i>This page for Department of State use only.</i>		SCHEDULE NO. <u>19</u> Agency No. <u>S2500000</u>	
Agency Name: <u>Sarasota Manatee Airport Authority</u>					
Record Series Title, Description, and Retention					
If approved, this records retention schedule remains in effect until there is a change in series content or until other factors are introduced which would affect the retention period, at which time a new request for an individual records retention schedule should be submitted for approval. If a new general records schedule is later established that requires an equal or longer retention period for the same records, that general records schedule supersedes this individual records retention schedule.					
<input checked="" type="checkbox"/> Approved					
Permits/Licenses/Certifications: Recipient Agency This record series documents permits, licenses and certifications issued to the authority by another public agency. Permits, licenses and certifications may be issued to conduct business such as operating weights and measures instruments and engaging in the business of outdoor advertising.					
Retention: a) Record Copy. Retain for as long as is required by the issuing agency or until obsolete, superseded, or administrative value is lost, whichever is applicable. b) Duplicates. Retain until obsolete, superseded or administrative value is lost.					
<input type="checkbox"/> Disapproved Comments: _____					
Schedule Review Analyst Review <u>A. Pepe - 12/08/2017</u> Archivist Review <u>T. McLean 12/8/17</u> Supervisor Review <u>Berna Gallego 12/6/17</u>			Schedule Approval <u>Aneft Dha</u> 12/11/2017 Director Date Division of Library and Information Services Florida Department of State		



Retaining Records Beyond Retention

Dispose of records as they meet retention to **reduce** amount of **unnecessary records**.

Retain for **longer** if there is **good justification**:

- Administrative need.
- Public records request within the last 30 days. 119.07(1)(h), F.S.
- Active or anticipated litigation.
- Audit pending.

Disposition of Records

- Disposition could be **destruction**, **deletion** or **transferring custody** to an archives or historical society.
- Agencies must **document records disposition**.
1B-24.003(9)(d), F.A.C.
- Documentation is **not required** for **OSA records** unless they are part of a **retrospective conversion project**.



Disposition Documentation

Must include for **each record series**:

1. Schedule number.
2. Item number.
3. Record series title.
4. Inclusive dates.
5. Volume.
6. Date and manner of disposition.

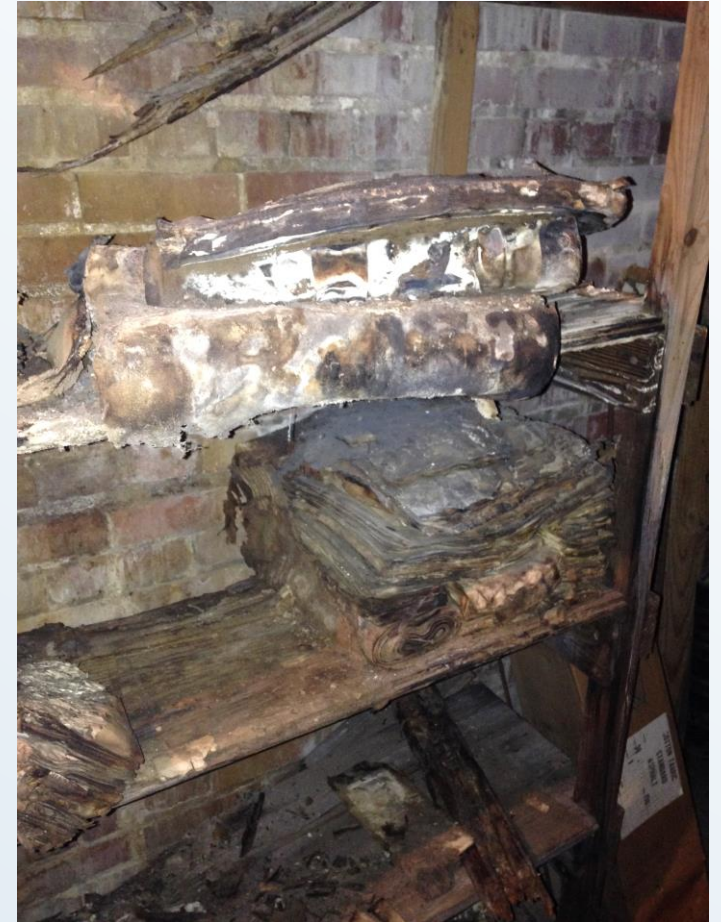
1B-24.003(9)(d), F.A.C.

Example:

5. LIST OF RECORD SERIES						
a. Schedule No.	b. Item No.	c. Title	d. Retention	e. Inclusive Dates	f. Volume In Cubic Feet	g. Disposition Action and Date Completed After Authorization
GS1- SL	238	Public Program/Event Records	5 FY	4/7/2014 - 10/22/2014	0.25	Shredding 7/1/2020

Untimely Disposals

- Create **disposition documentation**.
- **Document what you can** – you may need to make some educated guesses.
- Document dispositions **as you become aware** of them.
- Consider including **additional documentation** (i.e., photographs, memo of explanation, news articles, press releases, etc.).



Public Records Access

“SECTION 24. Access to public records and meetings.—(a) Every person has the **right to inspect or copy any public record** made or received in connection with the official business of any public body, officer, or employee of the state, or persons acting on their behalf, **except with respect to records exempted** pursuant to this section or specifically made confidential by this Constitution. This section specifically includes the legislative, executive, and judicial branches of government and each agency or department created thereunder; counties, municipalities, and districts; and each constitutional officer, board, and commission, or entity created pursuant to law or this Constitution. . . (c) . . . The **legislature**, however, **may provide by general law . . . for the exemption of records** from the requirements of subsection (a) . . .”

Constitution of the State of Florida

“Every person who has **custody of a public record** shall **permit the record to be inspected** and copied by any person desiring to do so, at any **reasonable time**, under **reasonable conditions**, and **under supervision** by the custodian of the public records.”

119.07(1)(a), F.S.



Exempt/Confidential and Exempt

Exempt = “. . . a specified record or meeting, or portion thereof, is **not subject to ... access requirements.**” 119.011(8), F.S.

Exempt information **may be subject** to disclosure in **certain circumstances.**

Confidential and exempt information = not subject to mandatory disclosure and can only be disclosed to those entities and individuals **identified in the statute.**

But – they are **still “public records”** even if the public can’t view them!

Confidential and Exempt Information

Over **1,100 restrictions** are located throughout Florida Statutes. Examples:

- Social Security numbers held by an agency. 119.071(5)(a)5., F.S.
- Patient medical records. 395.3025(4), (5), (7), (8), F.S.; 119.0712(1), F.S.
- Autopsy photographs and recordings. 406.135(2), F.S.
- U.S. Census Bureau information. 13 U.S.C. s. 9, 16 [119.071(1)(g)1.]
- Security system records of property owned or leased by the state. 281.301, F.S.
- Public library registration and circulation records. 257.261, F.S.

257.261 Library registration and circulation records.—(1) All registration and circulation records of every public library, except statistical reports of registration and circulation, are confidential and exempt from the provisions of s. 119.07(1) and from s. 24(a) of Art. I of the State Constitution.

(2) As used in this section, the term “registration records” includes any information that a library requires a patron to provide in order to become eligible to borrow books and other materials, and the term “circulation records” includes all information that identifies the patrons who borrow particular books and other materials.

Annual Compliance Statement

“Each agency shall **submit to the Division**, once a year, a **signed statement attesting to the agency’s compliance** with records management laws, rules, and procedures.” 1B-24.003(11), F.A.C

- Mailed out to agencies in November of each year.
- Completed by the agency.
- Must be returned by **December 31**.

RECORDS MANAGEMENT COMPLIANCE STATEMENT
Fiscal Year 2016-2017
Agency ID: C0121000

Section I Compliance Certification	<p>1. This agency is in compliance with Section 257.36(5), <i>Florida Statutes</i>,¹ and Rule 1B-24.003(9), <i>Florida Administrative Code</i>,² for all public records regardless of medium or format (e.g., paper; electronic, including email; microfilm; audio; video; etc.). <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No (Unmarked responses will be recorded as not in compliance.)</p> <p>2. This agency disposed of <u>11763</u> cubic feet of records during the fiscal year indicated above.</p> <p>3. This agency disposed of records in electronic form during the fiscal year indicated above. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (It is not necessary to indicate volume of electronic records disposed.)</p> <p>4. <input type="checkbox"/> Check here if you would like to be contacted for assistance. Indicate your questions/areas of concern on the reverse side of this form.</p> <p>Agency Head Signature: <u>Robert W. Runcie</u> Date: <u>12/11/2017</u> Name of Agency Head (please print): <u>ROBERT W. RUNCIE</u> Title of Agency Head (please print): <u>BROWARD COUNTY PUBLIC SCHOOLS</u></p>
Section II Agency Information	<p>Please indicate changes to Agency Information on the lines provided on the right.</p> <p style="text-align: center;"><u>Current Information:</u> Please do not erase or cover information below. Indicate changes or additions on the lines below.</p> <p>Agency Name: Broward County School Board _____ Agency Head: Mr. Robert W. Runcie _____ Address: 600 S.E. Third Avenue _____ Fort Lauderdale, Florida 33301-3125 _____</p>
Section III RMLO Information	<p>Section 257.36(5)(a), <i>Florida Statutes</i>,¹ requires public agencies to designate a Records Management Liaison Officer (RMLO). Please indicate changes to RMLO Information on the lines provided on the right. If Current Information is blank, please designate an RMLO for your agency on the lines provided on the right.</p> <p style="text-align: center;"><u>Current Information:</u> Please do not erase or cover information below. Indicate changes or additions on the lines below.</p> <p>RMLO: Ms. Lucia Ungaro _____ Address: 7720 West Oakland Park Blvd _____ Sunrise, FL 33351 _____ Phone: (754) 321-3151 Ext.: _____ Email: lucia.ungaro@browardschools.com _____</p>

¹Section 257.36(5), *Florida Statutes*: "For the purposes of this section, the term 'agency' shall mean any state, county, district, or municipal officer, department, division, bureau, board, commission, or other separate unit of government created or established by law. It is the duty of each agency to: (a) Cooperate with the division in complying with the provisions of this chapter and designate a records management liaison officer. (b) Establish and maintain an active and continuing program for the economical and efficient management of records."

²Rule 1B-24.003(9), *Florida Administrative Code*: "Public records may be destroyed or otherwise disposed of only in accordance with retention schedules established by the Division. Photographic reproductions or reproductions through electronic recordkeeping systems may substitute for the original or paper copy, per Section 92.28, F.S. Photographic or electronic copies. ... Prior to records disposition, agencies must ensure that all retention requirements have been satisfied. For each record series being disposed of, agencies shall identify and document the following: 1. Records retention schedule number; 2. Item number; 3. Record series title; 4. Inclusive dates of the records; 5. Volume in cubic feet for paper records; for electronic records, record the number of bytes and/or records and/or files if known, or indicate that the disposed records were in electronic form; and 6. Disposition action (manner of disposition) and date."

Please complete and return this compliance statement by December 29, 2017 (submit one copy only, please) to:
 Department of State
 Records Management Program, Mail Station 9E **OR** recmgt@dos.myflorida.com
 Tallahassee, FL 32399-0250

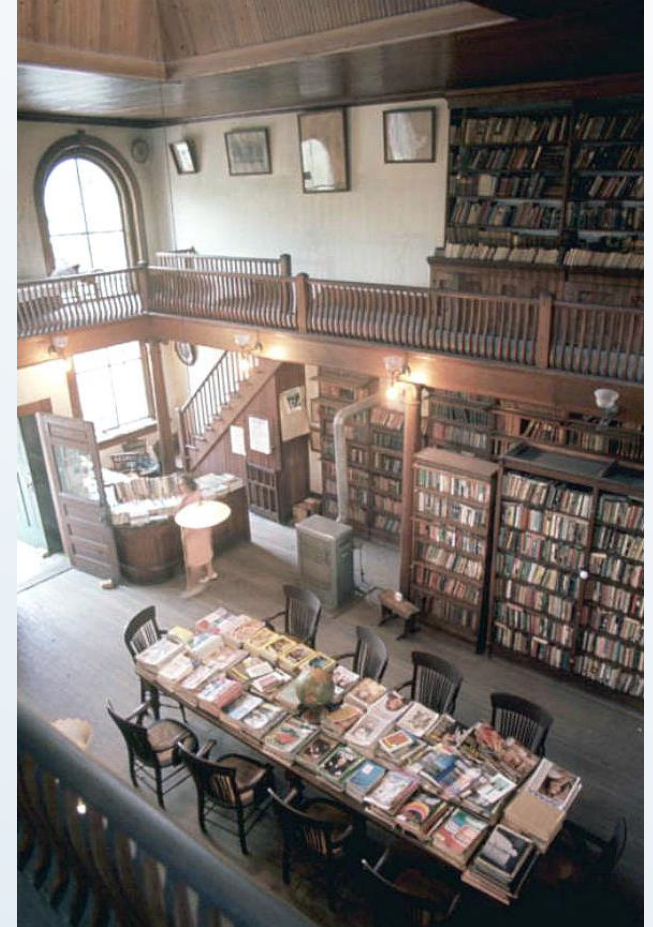


Records Management Liaison Officer

- **Required by statute.** 257.36(5)(a), F.S.
- Point of contact between **agency** and **Bureau of Archives and Records Management**.
- Other **RMLO** duties are determined by the agency but may include:
 - Participating in the development of records management policies and procedures.
 - Coordinating the identification of agency's records.
 - Maintaining retention schedules and disposition documentation.
 - Coordinating staff training on records management.
 - Ensuring compliance statement is returned to DLIS in a timely manner.

Public Agency Responsibilities

- **Develop** a records management policy.
- **Maintain** an economical and efficient records management program.
- **Appoint** a records management liaison officer (**RMLO**).
- **Adhere** to established retention schedules.
- **Document** the disposition of public records.
- **Follow** access provisions for public records.
- **Return** completed annual compliance statement.



DOS Records Management Resources

info.florida.gov

FLORIDA DEPARTMENT OF STATE | Corporations | Arts and Culture | Elections | Historical Resources | Library and Information Services


DIVISION OF LIBRARY and INFORMATION SERVICES

The Division manages the State Library and Archives, supports public libraries, directs records management services, and is the designated information resource provider for the state of Florida

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Early Map of La Florida

RESEARCH	RECORDS MANAGEMENT	SERVICES FOR LIBRARIES
Research at the State Archives	General Records Schedules	Grants
Services for State Employees	Records Management Liaison Officers	Continuing Education
Search Our Catalogs	Dispose of Public Records	Community Engagement
Get a Library Card	Training	Florida Libraries
Preserve Your Collections	Forms and Publications	Find a Florida Library


MORE IN RESEARCH | MORE IN RECORDS MANAGEMENT | MORE IN SERVICES FOR LIBRARIES

Department of State / Division of Library and Information Services / Records Management


Records Management




General Records Schedules




Records Management Liaison Officers




Forms and Publications




Records Management Training




Dispose of Public Records




State Records Center



Disaster Recovery



Florida Statutes and Rules



Records Management FAQ



Resources!

Department of State / Division of Library and Information Services / Records Management / General Records Schedules

General Records Schedules

General Records Schedules set retention requirements for records documenting administrative and program functions common to several or all government agencies.

Examples include personnel, accounting and general administration.

Not all individual records are covered by these General Records Schedules. Please contact your Records Management Liaison Officer for more information.

Schedule number	Agency	Last revised	PDF	Excel
GS1-SL	State and Local Government Agencies	2020	557KB	86KB
GS2	Law Enforcement, Correctional Facilities and District Medical Examiners	2021	833KB	59KB
GS3	Election Records	2012	632KB	138KB
GS4	Public Hospitals, Health Care Facilities and Medical Providers	2020	458KB	62KB
GS5	Public Universities and Colleges	2012	69KB	62KB
GS6	Building Departments	See GS1-SL		
GS7	Public Schools Pre-K-12 and Adult and Career Education	2019	105KB	110KB
GS8	Fire Departments	2020	523KB	41KB
GS9	State Attorneys	2004	26KB	
GS10	Public Defenders	Deactivated Dec 2013		
GS11	Clerks of Court	2010	121KB	55KB
GS12	Property Appraisers	2013	115KB	64KB
GS13	Tax Collectors	2019	147KB	75KB
GS14	Public Utilities	2020	727KB	51KB
GS15	Public Libraries	2003	39KB	

RECORDS MANAGEMENT

Department of State / Division of Library and Information Services / Records Management / Records Management Training

Records Management Training

Seminars

DLIS hopes to resume in-person, full-day seminars at a future date.
Contact rmtraining@dos.myflorida.com to discuss virtual training options.

Records management seminars:

- > Teach basic records management principles and best practices.
- > For individuals with records management responsibilities.
- > For individuals employed by newly created public agencies.
- > Good refresher course in records management.
- > Various locations around the state; classes last all day.

Webinars

Records management webinars:

- > Provide your agency with an efficient and economical alternative to on-site training in a few hours.
- > Available upon request; can be tailored to your agency's specific needs.
- > Overview of Florida's Public Records Law.
- > Methods of records inventory.
- > How to determine retention and disposition requirements.

On-site presentations and consultations

On-site presentations

- > Teach records management principles and best practices.
- > Offer in-person opportunities for questions and discussion.
- > For agency officials and employees with records management responsibilities.
- > For agency officials and employees of newly-created public agencies.
- > For organizations whose members are Florida public agency employees or officials.

Consultations

- > Review agency's records management programs and practices.
- > Provide advice, guidance and recommendations based on agency's specific conditions and requirements.
- > For Florida public agencies and institutions.

Read more about presentations and consultations, their fees and more.

Contact rmtraining@dos.myflorida.com to request:

- > An on-site training presentation for your agency or professional organization.
- > An on-site consultation for your agency.

RECORDS MANAGEMENT

Department of State / Division of Library and Information Services / Records Management / Forms and Publications

Forms and Publications

Forms

Form	Word	PDF	Excel
Request for Records Retention Schedule	57 KB	50 KB	
Records Disposition Document	44 KB	13 KB	
Records Management Liaison Officer Appointment Form		77 KB	
Transmittal and Receipt for Records Storage	67 KB	14 KB	
Request for Reference Service	80 KB	16 KB	
Request for Return of Reference Service Work	55 KB	13 KB	
Records Storage Box Labels (Two Per Page)	65 KB	106 KB	
Records Storage Box Labels (Three Per Page)	78 KB	200 KB	
Request for Non-SRC Destruction	38 KB	25 KB	
Non-SRC Destruction Box Label	34 KB	7 KB	
Records Inventory Worksheet		251 KB	
Transmittal/Receipt Transfer of Public Records to Archives		38 KB	
File Plan Form			16 KB

Publications

- > [Managing Florida's Public Records \(PDF\)](#)
- > [General Records Schedules](#)
- > [Florida State Records Center Handbook \(PDF\)](#)
- > [Public Records Center Facilities Guidelines \(PDF\)](#)
- > [Records Storage and Facilities Guidelines for Archives and Historical Records Repositories \(PDF\)](#)
- > [Records Management Self-Evaluation Guide \(PDF\)](#)
- > [Micrographics Handbook \(PDF\)](#)
- > [Legislative Records: Guide to Preparation and Transfer \(PDF\)](#)

RECORDS MANAGEMENT

General Records Schedules

Records Management Liaison Officers

Forms and Publications

Records Management Training

Dispose of Public Records

State Records Center

Disaster Recovery

Florida Statutes and Rules

Records Management FAQ

Related Links

CONTACT US



Contact us at recmgt@dos.myflorida.com.



Records Management Training

- **Seminars** – full day classes conducted in locations around the state.
- **Webinars** – one- to four-hour online classes provided upon request.
- **On-site presentations** – classes for requesting public agencies/institutions or professional organizations.
- **On-site consultations** – review and recommendations for requesting public agencies/institutions.



Vie Miller, Stephanie Boggs

Technical Assistance

- Records retention questions.
- New records retention schedules.
- Updating retention schedules.
- Public access questions.
- Compliance reporting questions.
- Phone, email or on-site assistance (Tallahassee area).



Brenda Lippy

Need Legal Advice?

We cannot provide legal advice or legal interpretation.

- Request guidance from and proceed on the advice of your agency's legal counsel.
- Consult Government-in-the-Sunshine Manual.
- Search **Attorney General Opinions**.
<http://myfloridalegal.com/opinions>



Attorney General Opinions

[en Español](#)
 Florida Attorney General Advisory Legal Opinions

- [Requesting an Attorney General Opinion](#)
- [Searchable Database of Attorney General Opinions](#)
- [Historical Collection of Attorney General Opinions](#)
- [Attorney General Opinion Indexes - 1895 to 1981](#)
- [How to Obtain Previous Opinions](#)
- [Dual Officeholding Pamphlet](#)
- [Sunshine Manual](#)
- [Annual Report](#)

Search for Advisory Legal Opinions

Construct your query then click Search

Search by Word
 Search for of the following words:

1. <input type="text" value="public records"/>	2. <input type="text" value="fees"/>
3. <input type="text"/>	4. <input type="text"/>
5. <input type="text"/>	6. <input type="text"/>
7. <input type="text"/>	8. <input type="text"/>

Find exact word matches only

Search Results

[Simple Search](#) [Advanced](#)

Your Search Produced 500 out of 500 Maximum Results. 1 through 20 shown.

AGO 2016-16	10/05/2016	South Broward Hospital District - Public Records
AGO 90-10	02/06/1990	Public records, local regulation
AGO 76-34	02/16/1976	Use of computer terminal and public records
AGO 2005-28	04/28/2005	Public Records, fees for copying records
AGO 83-80	10/31/1983	Public records; children's residence
AGO 75-304	12/19/1975	Contract to furnish public records
AGO 99-41	06/30/1999	Copying fees for records in central voter file
AGO 90-81	10/04/1990	Public record, fee for copies
AGO 2013-03	01/30/2013	Public Records, charges for electronic records
AGO 90-07	01/29/1990	Retrieval costs when public records stored off premises
AGO 88-23	06/01/1988	Training tapes as public records
AGO 85-19	02/28/1985	Setting fee for record duplication, preemption
AGO 80-57	06/17/1980	Public records request by telephone
AGO 2002-37	05/20/2002	Records, providing records through private entity

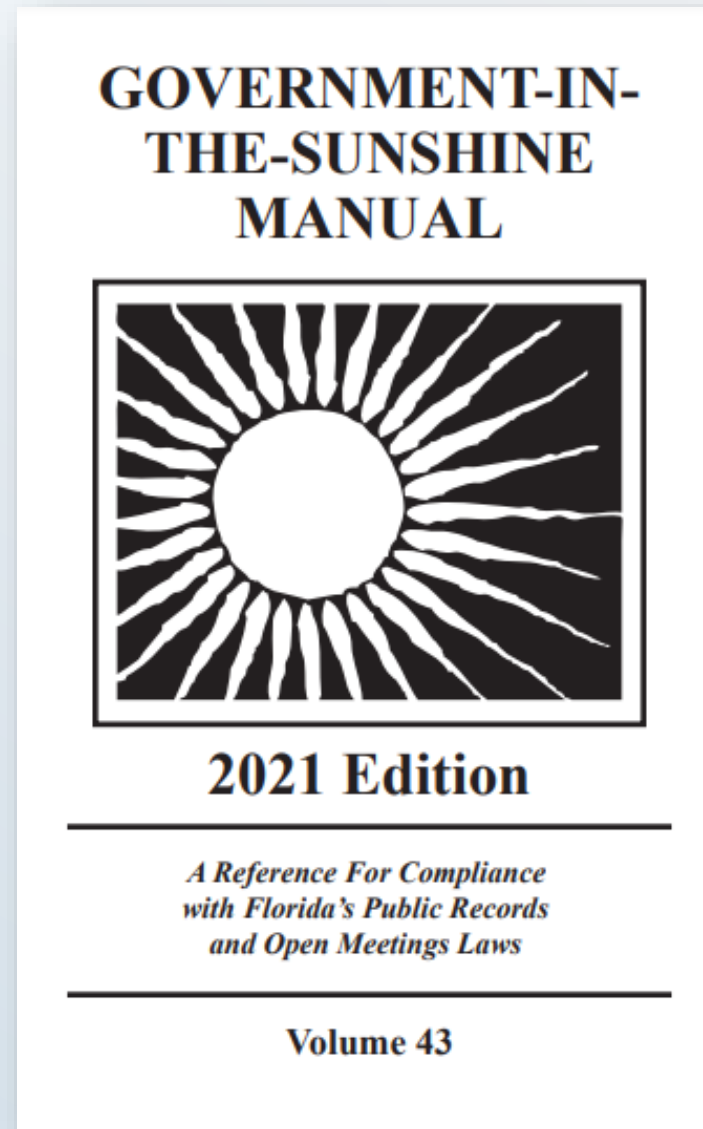
Government-in-the-Sunshine Manual

- Great guide to Florida **public records requirements**.
- Lists **restrictions** and **corresponding statutes**.
- Available on the **Florida Attorney General's website**.

<http://www.myflsunshine.com/sun.nsf/sunmanual>

- Print editions can be purchased from the **First Amendment Foundation**.

<https://first-amendment-foundation.myshopify.com/collections/publications>



Records Management Program Contacts

Training

General

RMTraining@DOS.MyFlorida.com

Stephanie Boggs

Stephanie.Boggs@DOS.MyFlorida.com

850.245.6745

Vie Miller

Vie.Miller@DOS.MyFlorida.com

850.245.6746

Technical Assistance

General

Recmgt@DOS.MyFlorida.com

850.245.6750, Option 2

Brenda Lipply

Brenda.Lipply@DOS.MyFlorida.com

850.245.6770



Questions





FLORIDA DEPARTMENT *of* STATE

Ron DeSantis, Governor
Laurel M. Lee, Secretary of State
Florida Department of State
Division of Library and Information Services

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