

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

Issued to: Municipal Clerk, Office of

Last Revised: 12/12/2017



Vermont State Archives and Records Administration

Vermont Office of the Secretary of State

AGENCY SPECIFIC RECORD SCHEDULE FOR: Municipal Clerk, Office of

- Authority:** A custodian of public records shall not destroy, give away, sell, discard, or damage any record or records in his or her charge, unless specifically authorized by law or under a record schedule approved by the state archivist pursuant to subdivision 117(a)(5) of Title 3. (1 V.S.A. § 317a)
- Scope:** This agency specific record schedule is applicable only to the records listed on this record schedule that are produced or acquired during the course of agency business. Records are any written or recorded information, regardless of physical form or characteristics, and includes electronic or digital records and data. (1 V.S.A. § 317)
- Use:** This is an agency specific record schedule (SRS). The agency (Municipal Clerk, Office of) may develop its own internal policies and procedures to assure that the requirements outlined in this record schedule are being applied across the agency. For records required to be retained until OBSOLETE, an internal policy clearly stating specific retention requirements that best meet the agency's administrative needs is highly advised. Specific Record Schedule (SRS) numbers shall be cited in all internal policies to demonstrate compliance with 1 V.S.A. § 317a.
- Exemptions:** It is the policy of Title 1, Chapter 5, Subchapter 3 of Vermont Statutes Annotated to provide for free and open examination of records consistent with Chapter 1, Article 6 of the Vermont Constitution. All people, however, have a right to privacy in their personal and economic pursuits, which ought to be protected unless specific information is needed to review the action of a governmental officer. Some records listed on this record schedule may be exempt from public inspection and copying for this reason. Security measures to protect records and information from unauthorized access, use, and disclosure are necessary if the records are exempt pursuant to 1 V.S.A. §§ 315-320. Please see Appendix B for Access Requirements and Appendix E for related legal references regarding exemptions from public inspection and copying.
- Retention:** This agency specific record schedule reflects the retention and disposition requirements for the following records regardless of their media, format, or mode of transmission. Duplicate records within the same agency that are used for specific legal, fiscal, or administrative purposes may be either retained using the retention requirement listed in this schedule or in accordance to an internal policy. Any copies of records made only for convenience of reference or informational purposes may be discarded when no longer needed unless otherwise directed through an internal policy. Within the same agency, duplicates or copies of records shall not be retained longer than the original records.
- Adoption:** This agency specific record schedule is in effect for the agency (Municipal Clerk, Office of) at the time the incumbent takes office and includes any records created or produced as part of the transition into his or her role as an elective or appointive official. If, at any time, this agency specific record schedule does not address all the records created or produced in the course of agency business or the requirements related to the following records have changed, this schedule will need to be revised accordingly by the Vermont State Archives and Records Administration.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

SRS-1350.1059: Dog Licenses

SRS-1350.1059: This schedule is reserved for recorded evidence of activities and transactions that relate to or affect, in a specific manner, the licensing of domestic pets and wolf-hybrids.

Classification: Domestic pets and wolf-hybrids (Licensing)

Retention: Retain current certifications for licensed dogs and wolf-hybrids at all times.

All other records shall be retained as specified in this schedule with the exception of transitory records. Transitory records created or received as part of the licensing process may be weeded as appropriate in accordance with GRS-1714.1000 (Municipal Clerk's Transitory Records).

Public Access: General

SPECIFIC RECORDKEEPING REQUIREMENTS for SRS-1350.1059 (see APPENDIX E for related legal references)

Record Category/Type:	Applicability/Use:	Appraised Value:	Retention/Disposition:
SRS-1350.1059.21 Certificates Public Access: <i>General</i>	Use for written documents delivered to the municipal clerk certifying that conditions or requirements for obtaining or renewing a license have been met. For licensed dogs and wolf-hybrids, retain most current certificates at all times and use this schedule for certificates that have expired based on expiration date of the certificate or license, whichever is earlier.	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)
SRS-1350.1059.50 Notices, Legal Public Access: <i>General</i>	Use for official, written statements, notices, or announcements required by law.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 1 Year(s) THEN: Destroy (General)
SRS-1350.1059.81 Registers Public Access: <i>General</i>	Use for registers, databases and similar systems that provide for the systematic and regular recording of the names of the owners or keepers of the dogs or wolf-hybrids licensed and the names, registered numbers and descriptions of such dogs or wolf-hybrids, and related information.	Temporary (Legal)	RETAIN UNTIL: Superseded PLUS: 3 Year(s) THEN: Destroy (General)

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SRS-1350.1059.151 Returns Public Access: <i>General</i>	Use for sworn statements of the amount of moneys received and paid, lists of dogs and wolf-hybrids not licensed or inoculated as required by law, and similar annual reports, lists or statistics related to the licensing of dogs and wolf-hybrids.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 1 Year(s) THEN: Destroy (General)
SRS-1350.1059.150 Waivers Public Access: <i>Review</i>	Use for written statements by the municipality waiving the license fee due to financial hardship.	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)

SRS-1350.1059 was approved by the Vermont State Archivist on 5/31/2017.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

SRS-1690.1103: Managing General Elections

SRS-1690.1103: This schedule is reserved for recorded evidence of activities and transactions that relate to or affect, in a specific manner, managing the general election held on the first Tuesday after the first Monday in November, in even-numbered years.

Classification: General elections (Managing)

Retention: Retain final vote returns permanently.

Retain checklists a minimum of five (5) years after the election is completed, then destroy by recycling.

Retain early and absentee voter applications, ballots, lists, and vote calculation worksheets until expired, then recycle. Applications, ballots, lists, and worksheets expire 22 months after the election is completed.

Retain voter petitions until expired, then destroy by recycling. Petitions expire 30 days after the general election is completed.

All other records shall be retained as specified in this schedule with the exception of transitory records. Transitory record created or received as part of managing a general election may be weeded as appropriate in accordance with SRS-1714.1000 (Municipal Clerk's Transitory Records).

Public Access: General

SPECIFIC RECORDKEEPING REQUIREMENTS for SRS-1690.1103 (see APPENDIX E for related legal references)

Record Category/Type:	Applicability/Use:	Appraised Value:	Retention/Disposition:
SRS-1690.1103.8 Applications Public Access: <i>General</i>	Use for written applications for an early or absentee voter ballot. Applications for general elections expire 22 months after the election for which they were used is completed.	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)
SRS-1690.1103.129 Ballots Public Access: <i>General</i>	Use for pre-printed Australian ballots used to cast a vote. Includes voting instructions provided with ballot, spoiled, and sample ballots, and signed ballot envelopes. Ballots for general elections expire 22 months after the election for which they were used is completed. For unused ballots, use the retention requirements for Blanks in SRS-1714.1000 (Municipal Clerk's Transitory Records).	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)

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<p>SRS-1690.1103.21 Certificates Public Access: <i>General</i></p>	<p>Use for declarations by voters that they have met voter eligibility requirements. Includes court orders allowing individuals to vote.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)</p>
<p>SRS-1690.1103.22 Checklists Public Access: <i>General</i></p>	<p>Use for voter checklists printed for the election. Includes master, district, entrance and exit checklists. For posted copies of the voter checklist, use the retention requirements for Reference Sources in SRS-1714.1000 (Municipal Clerk's Transitory Records).</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 5 Year(s) THEN: Destroy (General)</p>
<p>SRS-1690.1103.55 Lists Public Access: <i>General</i></p>	<p>Use for lists of voters requesting delivery of early or absentee ballots. Lists for general elections expire 22 months after the election for which they were used is completed. For lists of voters used by Justices of the Peace to deliver ballots, use the retention requirements for Reference Sources in SRS-1714.1000 (Municipal Clerk's Transitory Records).</p>	<p>Temporary (Administrative)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1690.1103.50 Notices, Legal Public Access: <i>General</i></p>	<p>Use for official, written statements, notices, or announcements that are required by law. Includes warnings of elections.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 1 Year(s) THEN: Destroy (General)</p>
<p>SRS-1690.1103.67 Petitions Public Access: <i>General</i></p>	<p>Use for petitions to nominate candidates or act on public questions. Petitions expire 30 days after the general election is completed.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1690.1103.151 Returns Public Access: <i>General</i></p>	<p>Use for official grand total of vote counts or official return of votes.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 0 Year(s) THEN: Archives</p>
<p>SRS-1690.1103.104 Worksheets Public Access: <i>General</i></p>	<p>Use for tally and summary sheets used to prepare or update vote calculations. Worksheets for general elections expire 22 months after the election for which they were used is completed.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>

SRS-1690.1103 was approved by the Vermont State Archivist on 12/11/2017.

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SRS-1348.1103: Managing Local Elections

SRS-1348.1103: This schedule is reserved for recorded evidence of activities and transactions that relate to or affect, in a specific manner, managing any election which deals with the selection of persons to fill public office or the settling of public questions solely within a single municipality or in several municipalities, in which the municipalities must unanimously concur if the question is to be approved. Includes special elections. The election of a representative to the General Assembly is not a "local election."

Classification: Local elections (Managing)

Retention: Retain final vote returns permanently.

Retain checklists a minimum of five (5) years after the election is completed, then destroy by recycling.

Retain early and absentee voter applications, ballots, early and absentee voter lists, and vote calculation worksheets until expired, then recycle. Applications, ballots, lists, and worksheets expire 90 days after the election is completed.

Retain voter petitions until expired, then destroy by recycling. Petitions expire 30 days after the local election for which they were used is completed.

All other records shall be retained as specified in this schedule with the exception of transitory records. Transitory records created or received as part of managing a local election may be weeded as appropriate in accordance with SRS-1714.1000 (Municipal Clerk's Transitory Records).

Public Access: General

SPECIFIC RECORDKEEPING REQUIREMENTS for SRS-1348.1103 (see APPENDIX E for related legal references)

Record Category/Type:	Applicability/Use:	Appraised Value:	Retention/Disposition:
SRS-1348.1103.8 Applications Public Access: <i>General</i>	Use for written applications for an early or absentee voter ballot. Applications for local elections expire 90 days after the election for which they were used is completed. For joint applications for early or absentee voter ballots in local and general elections, use the retention requirements for Applications in SRS-1690.1103 (General Elections Records).	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)

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<p>SRS-1348.1103.129 Ballots Public Access: <i>General</i></p>	<p>Use for pre-printed Australian ballots, sheets of paper or other devices used to cast a vote. Includes voting instructions provided with ballot, spoiled, and sample ballots, and signed ballot envelopes. Ballots expire 90 days after the election is completed. For unused ballots, use the retention requirements for Blanks in SRS-1714.1000 (Municipal Clerk's Transitory Records).</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1348.1103.21 Certificates Public Access: <i>General</i></p>	<p>Use for declarations by voters that they have met voter eligibility requirements. Includes court orders allowing individuals to vote.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)</p>
<p>SRS-1348.1103.22 Checklists Public Access: <i>General</i></p>	<p>Use for voter checklists printed for the election. Includes master, district, entrance and exit checklists. For posted copies of the voter checklist, use the retention requirements for Reference Sources in SRS-1714.1000 (Municipal Clerk's Transitory Records).</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 5 Year(s) THEN: Destroy (General)</p>
<p>SRS-1348.1103.55 Lists Public Access: <i>General</i></p>	<p>Use for official lists of voters requesting early or absentee ballots. Lists expire 90 days after the election is completed. For lists of voters used by Justices of the Peace to deliver ballots, use the retention requirements for Reference Sources in SRS-1714.1000 (Municipal Clerk's Transitory Records).</p>	<p>Temporary (Administrative)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1348.1103.50 Notices, Legal Public Access: <i>General</i></p>	<p>Use for official, written statements, notices, or announcements that are required by law. Includes warnings of elections. For elections that occur at municipal meetings the original meeting warning shall be recorded with the clerk before being posted.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 1 Year(s) THEN: Destroy (General)</p>
<p>SRS-1348.1103.67 Petitions Public Access: <i>General</i></p>	<p>Use for petitions to nominate candidates and bring public questions before voters. Petitions expire 30 days after the local election for which they were used is completed.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1348.1103.151 Returns Public Access: <i>General</i></p>	<p>Use for official grand total of vote counts or official return of votes. Includes charter change returns.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 0 Year(s) THEN: Archives</p>

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SRS-1348.1103.104

Worksheets

Public Access: **General**

Use for tally and summary sheets used to prepare or update vote calculations. Worksheets expire 90 days after the election is completed.

Temporary (Legal)

RETAIN UNTIL: Expired

PLUS: 0 Year(s)

THEN: Destroy (General)

SRS-1348.1103 was approved by the Vermont State Archivist on 12/11/2017.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

SRS-1689.1103: Managing Primary Elections

SRS-1689.1103: This schedule is reserved for recorded evidence of activities and transactions that relate to or affect, in a specific manner, managing any election which precedes a general or special election, for the purpose of permitting political parties to nominate, from among all of the candidates for any office, only that number of candidates equal to the number of persons to be elected to that office at the succeeding general or special election.

Classification: Primaries (Managing)

Retention: Retain final vote returns permanently.

Retain checklists a minimum of five (5) years after the election is completed, then destroy by recycling.

Retain early and absentee voter applications, ballots, lists and vote calculation worksheets until expired, then recycle. Applications, ballots, lists, and worksheets are expire 22 months after the election is complete.

Retain voter petitions until expired, then destroy by recycling. Petitions expire 30 days after the general election for which they were used is completed.

All other records shall be retained as specified in this schedule with the exception of transitory records. Transitory record created or received as part of managing a general election may be weeded as appropriate in accordance with SRS-1714.1000 (Municipal Clerk's Transitory Records).

Public Access: General

SPECIFIC RECORDKEEPING REQUIREMENTS for SRS-1689.1103 (see APPENDIX E for related legal references)

Record Category/Type:	Applicability/Use:	Appraised Value:	Retention/Disposition:
SRS-1689.1103.8 Applications Public Access: <i>General</i>	Use for written applications for an early or absentee voter ballot. Applications for primaries expire 22 months after the election for which they were used is completed.	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)
SRS-1689.1103.129 Ballots Public Access: <i>General</i>	Use for pre-printed Australian ballots used to cast a vote. Includes voting instructions provided with ballot, spoiled, and sample ballots, and signed ballot envelopes. Ballots for primaries expire 22 months after the election for which they were used is completed. For unused and unvoted ballots, use the retention requirements for Blanks in SRS-1714.1000 (Municipal Clerk's Transitory Records).	Temporary (Legal)	RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)

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<p>SRS-1689.1103.21 Certificates Public Access: <i>General</i></p>	<p>Use for declarations by voters that they have met voter eligibility requirements. Includes court orders allowing individuals to vote.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)</p>
<p>SRS-1689.1103.22 Checklists Public Access: <i>General</i></p>	<p>Use for voter checklists printed for the election. Includes master, district, entrance and exit checklists. For posted copies of the voter checklist, use the retention requirements for Reference Sources in SRS-1714.1000 (Municipal Clerk's Transitory Records).</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 5 Year(s) THEN: Destroy (General)</p>
<p>SRS-1689.1103.55 Lists Public Access: <i>General</i></p>	<p>Use for lists of voters requesting delivery of early or absentee ballots. Lists for primaries expire 22 months after the election for which they were used is completed. For lists of voters used by Justices of the Peace to deliver ballots, use the retention requirements for Reference Sources in SRS-1714.1000 (Municipal Clerk's Transitory Records).</p>	<p>Temporary (Administrative)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1689.1103.50 Notices, Legal Public Access: <i>General</i></p>	<p>Use for official, written statements, notices, or announcements that are required by law. Includes warning of elections.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 1 Year(s) THEN: Destroy (General)</p>
<p>SRS-1689.1103.67 Petitions Public Access: <i>General</i></p>	<p>Use for petitions to nominate candidates or act on public questions. Petitions expire 30 days after the general election for which they were used is completed.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1689.1103.151 Returns Public Access: <i>General</i></p>	<p>Use for official grand total of vote counts or official return of votes.</p>	<p>Permanent (Archival)</p>	<p>RETAIN UNTIL: Completed/Closed PLUS: 0 Year(s) THEN: Archives</p>
<p>SRS-1689.1103.104 Worksheets Public Access: <i>General</i></p>	<p>Use for tally and summary sheets used to prepared or update vote calculations. Worksheets for primaries expire 22 months after the election for which they were used is completed.</p>	<p>Temporary (Legal)</p>	<p>RETAIN UNTIL: Expired PLUS: 0 Year(s) THEN: Destroy (General)</p>

SRS-1689.1103 was approved by the Vermont State Archivist on 12/11/2017.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

SRS-1714.1000: Municipal Clerk Transitory Records

SRS-1714.1000: This schedule is reserved for records that are created and received in the course of business by the office of the Municipal Clerk but transitory in nature meaning that that they are: (1) are only needed for a limited period of time in order to complete a routine action or prepare or update a formal or ongoing record; (2) not subject to any legal recordkeeping requirements, explicit or implied; and (3) administratively obsolete after a specific action or process is complete.

Classification: Municipal Clerk (GENERAL)

Retention: Transitory records shall be retained by the office of the Municipal Clerk as specified in this schedule or until the Municipal Clerk's last day in office, whichever is shorter, and then destroyed.

Public Access: General

SPECIFIC RECORDKEEPING REQUIREMENTS for SRS-1714.1000 (see APPENDIX E for related legal references)

Record Category/Type:	Applicability/Use:	Appraised Value:	Retention/Disposition:
SRS-1714.1000.187 Blanks Public Access: <i>General</i>	Use for blank forms or other pre-printed worksheets that have no markings, are not written or printed on and have not been filled out. Includes unused and unvoted ballots.	Temporary (Administrative)	RETAIN UNTIL: Obsolete PLUS: 0 Year(s) THEN: Destroy (General)
SRS-1714.1000.28 Correspondence (Routine) Public Access: <i>General</i>	Use for any correspondence, produced or received, that is routine in nature and not subject to any specific legal requirements. Includes transmittal letters that do not add information to that contained in the transmitted material and correspondence from other agencies that is received for general information purposes only.	Temporary (Administrative)	RETAIN UNTIL: Obsolete PLUS: 0 Year(s) THEN: Destroy (General)
SRS-1714.1000.37 Drafts Public Access: <i>General</i>	Use for preliminary or tentative versions of a document. Drafts that are acted upon or put into practice must be retained according to their intended record type (i.e. policies) as listed in another general record schedule or an agency-specific record schedule.	Temporary (Administrative)	RETAIN UNTIL: Obsolete PLUS: 0 Year(s) THEN: Destroy (General)
SRS-1714.1000.60 Notes Public Access: <i>General</i>	Use for brief statements of a fact or experience, written down for review, or as an aid to memory, or to inform someone else. Includes short, informal notes such as phone messages.	Temporary (Administrative)	RETAIN UNTIL: Obsolete PLUS: 0 Year(s) THEN: Destroy (General)

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<p>SRS-1714.1000.74 Publications Public Access: <i>General</i></p>	<p>Use for reproduced or published material received from other offices which require no action and are not required for documentary purposes. Includes catalogues, trade journals, other publications or papers received which require no action and are not part of a case upon which action is being taken or will be taken.</p>	<p>Temporary (Administrative)</p>	<p>RETAIN UNTIL: Obsolete PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1714.1000.80 Reference sources Public Access: <i>General</i></p>	<p>Use for sources of information that were intended primarily for consultation and, if used to prepare or update a formal or ongoing record, are cited as needed. Includes duplicate, informational, extra, unofficial, or informal copies of records that were kept only for convenience or quick reference.</p>	<p>Temporary (Administrative)</p>	<p>RETAIN UNTIL: Obsolete PLUS: 0 Year(s) THEN: Destroy (General)</p>
<p>SRS-1714.1000.139 Requests Public Access: <i>General</i></p>	<p>Use for requests and responses for forms, publications, records, and other agency information that do not require administration review before, or further action after, the form, publication, record, or other agency information is provided.</p>	<p>Temporary (Administrative)</p>	<p>RETAIN UNTIL: Obsolete PLUS: 0 Year(s) THEN: Destroy (General)</p>

SRS-1714.1000 was approved by the Vermont State Archivist on 12/11/2017.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

SRS-1319.1109: Voter Registration Records

SRS-1319.1109: This schedule is reserved for recorded evidence of activities and transactions that relate to or affect, in a specific manner, the registering of persons qualified to vote in an election in this State or a political subdivision of this State.

Classification: Voters (Registering)

Retention: Applications and decisions to decline to register to vote shall be retained until the general election for which they were used is complete or the decision to decline is received, plus four (4) years, then destroyed.

For minutes of public meetings related to voter registration use the retention requirements for Minutes in GRS-1000.1102 (Administrative Policy) and retain permanently.

Other records shall be retained as specified in this schedule with the exception of transitory records. Transitory records created or received as part of the voter registration process may be weeded as appropriate in accordance with SRS-1714.1000 (Municipal Clerk's Transitory Records).

Public Access: Redact

SPECIFIC RECORDKEEPING REQUIREMENTS for SRS-1319.1109 (see APPENDIX E for related legal references)

Record Category/Type:	Applicability/Use:	Appraised Value:	Retention/Disposition:
SRS-1319.1109.8 Applications Public Access: <i>Exempt</i>	Use for completed voter registration applications and oaths or affirmations. Includes written notices of intent to apply and applications submitted by or through the Department of Motor Vehicles or voter registration agencies on which individuals declined to register.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 4 Year(s) THEN: Destroy (Shred)
SRS-1319.1109.133 Decisions Public Access: <i>General</i>	Use for written decisions related to voter registration. Includes town clerk's and the Board of Civil Authority's voter renewal decisions. For decisions on voter registration that are in formal written minutes of the Board of Civil Authority, use the retention requirements for Minutes in GRS-1000.1102 (Administrative Policy Records).	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)
SRS-1319.1109.50 Notices, Legal Public Access: <i>General</i>	Use for evidence of official written notices or warnings. Includes proof of challenge letters, certificates of service and certified mail receipts.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 4 Year(s) THEN: Destroy (General)

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SRS-1319.1109.81 Registers Public Access: <i>Redact</i>	Use for the statewide voter checklist system. For working or printed copies of the checklist, use the retention requirements for Reference Sources in SRS-1714.1000 (Municipal Clerk's Transitory Records).	Temporary (Legal)	RETAIN UNTIL: Superseded PLUS: 2 Year(s) THEN: Destroy (Shred)
SRS-1319.1109.139 Requests Public Access: <i>General</i>	Use for written requests filed by voters to have their names stricken from the statewide voter checklist and challenge response post cards or letters.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)

SRS-1319.1109 was approved by the Vermont State Archivist on 12/11/2017.

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Appendix A: Appraisal Values

An appraisal value establishes the usefulness or importance of a record after its original purpose has passed. The value of a record also dictates how it must be disposed after retention requirements are met (also see "Retention Requirements"). The appraisal values below represent categories of values that may be assigned to records following the record appraisal process. See "Vermont Archival Records" in the Archives and Records Management Handbook for conditions a record must meet to be appraised as "archival."

Appraisal Value	Description	Usage
Conditional Archival	Records may have archival value.	Assigned to records that meet the conditions of a "Vermont Archival Record" under special conditions.
Permanent (Archival)	Records have archival value.	Assigned to records that meet the conditions of a "Vermont Archival Record" and are therefore permanent (archival) records.
Temporary (Administrative)	Records have temporary administrative value.	Assigned to records that do not meet the conditions of a "Vermont Archival Record" but are needed for administrative reasons.
Temporary (Legal)	Records have temporary legal value.	Assigned to records that do not meet the conditions of a "Vermont Archival Record" but have legal requirements governing their retention.
Unappraised	Default value for records that have not been appraised.	Assigned to records that have not been appraised and do not yet have retention or disposition requirements.

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Appendix B: Public Access Requirements

A public access requirement is the availability of a record for public use and inspection pursuant to 1 V.S.A. §§ 315-320. Unless exempt from public inspection and copying pursuant to 1 V.S.A. § 317, records are expected to be promptly produced for public inspection upon request. Public agencies shall follow the procedure outlined in 1 V.S.A. § 318. The access requirements below represent actions agencies must take based on specific laws associated with the accessibility of their records. With general record schedules, the default requirement is always REVIEW unless it is clear that certain records or information within a record are exempt from public use and inspection pursuant to 1 V.S.A. § 317. Agencies using general record schedules should defer to their internal policies for specific access requirements.

Access	Description	Usage
Exempt	Records shall not be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320.	Assigned to records that are wholly exempt from public use and inspection pursuant to 1 V.S.A. § 317.
General	Records may be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320.	Assigned to records that are not exempt from public inspection and copying pursuant to 1 V.S.A. § 317.
Redact	Records contain specific information that shall not be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320.	Assigned to records that contain specific information that is exempt from public inspection and copying pursuant to 1 V.S.A. § 317 and require exempt information to be redacted from the records prior to public use, inspection and/or copying.
Review	Records may be provided for free and open examination pursuant to 1 V.S.A. §§ 315-320 but not always. Default value for general schedules, which require agencies to establish internal policies.	Assigned to records that are generally not exempt from public inspection and copying pursuant to 1 V.S.A. § 317 but, in limited circumstances, may be exempt. Internal review and/or policy is required.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

Appendix C: Retention Requirements

A retention requirement is the length of time a record must be retained by an agency before it may be destroyed or transferred to the State Archives or an agency archives (also see "Disposition Requirements"). The retention requirements below represent events or triggers that cause records to move from an active to inactive state. An "event" is tied to a specific time requirement: i.e. Retain Until "Calendar Year Ends" PLUS 3 Years.

Retention	Description	Usage
Audit Complete	Retain until an audit or verification is complete.	Assigned to records that are actively used or needed until the information contained therein has been audited or verified.
Calendar Year Ends	Retain until the end of the calendar year.	Assigned to records that are actively used or needed until the end of the calendar year.
Completed/Closed	Retain until the activity or process supported by the record is completed.	Assigned to records that are actively used or needed until the activity is formally completed, closed, or finalized (includes appeals).
Expired	Retain until the conditions or requirements supported by the record are satisfied and no further action is needed.	Assigned to records that are actively used or needed until the conditions or requirements are satisfied and complete.
Fiscal Year Ends	Retain until the end of the fiscal year.	Assigned to records that are actively used or needed until the end of the fiscal year.
Life of Asset Ends	Retain for the life of the person, structure, object, organization, etc. that is the subject of the record.	Assigned to records that are actively used or needed for the life of person, structure, object, organization, etc.
Obsolete	Retain until the record is no longer needed and is valueless.	Assigned to records that have limited administrative value and may be purged when they no longer have any administrative value. Agency must develop internal policy that states when records no longer have administrative value.
Superseded	Retain until the record is superseded, updated, or revised.	Assigned to records that will be superseded, updated, or revised.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

Appendix D: Disposition Requirements

A disposition requirement is how an agency must dispose of a record from its legal custody once retention requirements have been met. Disposition is based on the record's appraisal value. If the record has been appraised as non-archival it will be destroyed after retention requirements are met. If appraised as archival the record will be transferred to the State Archives or agency archives for permanent preservation and access. The disposition requirements below represent actions that an agency must take once a record has met its retention requirements.

Disposition	Description	Usage
Archives	Retain permanently. These records are eligible for transfer to the State Archives or agency archives.	Assigned to records that have been appraised as having archival value and are therefore permanent records.
Confirm	Confirm disposition with the Vermont State Archives and Records Administration after retention requirement has been met.	Assigned to records that are maintained in a centralized database or information system or are appraised as conditional archival.
Destroy (General)	Destroy by recycling or deleting the record.	Assigned to records that have been appraised as non-archival and are not exempt from public access. Agency discretion advised for general record schedules.
Destroy (Shred)	Destroy by shredding (includes electronic shredding).	Assigned to records that have been appraised as non-archival and are exempt from public access or contain sensitive information.
Unappraised	Default value for records that have not been appraised.	Assigned to records that have not been appraised and do not yet have retention or disposition requirements.
Weed	Separate records that meet the conditions of a "Vermont Archival Record" from those that do not (temporary).	Assigned to records that have been appraised as conditional archival. Upon weeding the temporary records from the archival records, transfer archival records to Archives and destroy temporary records.

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

Appendix E: Legal References

SRS-1350.1059: Dog Licenses		<i>Review for Exemption?</i>
20 010 CVR 011	Dog, cat, and wolf-hybrid spaying and neutering program and fund	Yes
20 V.S.A. § 3581	General requirements [related to domestic pet or wolf-hybrid control]	No
20 V.S.A. § 3582	Dogs or wolf-hybrids obtained after April 1	No
20 V.S.A. § 3583	Domestic pets and wolf-hybrids kept for breeding purposes	No
20 V.S.A. § 3587	Dogs brought into state	No
20 V.S.A. § 3588	Issuance of licenses; record of licenses [related to domestic pet or wolf-hybrid control]	No
20 V.S.A. § 3589	Record of licenses [related to domestic pet or wolf-hybrid control]	No
20 V.S.A. § 3590	List of dogs and wolf-hybrids not licensed	No
20 V.S.A. § 3621	Issuance of warrant to impound, destroy; complaint	No
SRS-1690.1103: Managing General Elections		<i>Review for Exemption?</i>
1 V.S.A. § 315	Statement of policy [related to free and open examination of records]	Yes
1 V.S.A. § 316	Access to public records and documents	No
1 V.S.A. § 317	Definitions; public agency; public records and documents	Yes
1 V.S.A. § 317a	Disposition of public records	No
1 V.S.A. § 318	Procedure [related to producing records for inspection]	No
1 V.S.A. § 319	Enforcement [related to the denial of a request for public records]	No
1 V.S.A. § 320	Penalties [related to court orders for the production of any public agency records]	No
17 V.S.A. § 1881a	Senatorial districts; nominations and election	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

17 V.S.A. § 2154	Statewide voter checklist	Yes
17 V.S.A. § 2357	Place of filing petition [related to primary elections]	No
17 V.S.A. § 2359	Notification to secretary of state [related to primary elections]	No
17 V.S.A. § 2360	Preservation of petitions	No
17 V.S.A. § 2362	Primary ballots	No
17 V.S.A. § 2455	Duties of election officials	No
17 V.S.A. § 2471	General election ballot	No
17 V.S.A. § 2501	Determining districts [related to conduct of elections]	No
17 V.S.A. § 2508	Campaigning during polling hours; voter access	No
17 V.S.A. § 2521	Warnings and notices [related to conduct of elections]	No
17 V.S.A. § 2522	Sample ballots	No
17 V.S.A. § 2523	Posting at polling place on election day	No
17 V.S.A. § 2531	Application for early voter absentee ballot	No
17 V.S.A. § 2532	Applications; form [related to early or absentee voters]	No
17 V.S.A. § 2533	Notification of invalid application [related to early or absentee voters]	No
17 V.S.A. § 2535	Form of early voter absentee ballots and envelopes	No
17 V.S.A. § 2537	Early or absentee voting in the town clerk's office	No
17 V.S.A. § 2538	Delivery of ballots by justices of the peace	No
17 V.S.A. § 2540	Instructions to be sent with ballots	No
17 V.S.A. § 2542	Signing certificate [related to early or absentee voters]	No
17 V.S.A. § 2545	Receipt of marked ballots by town clerk; delivery to election officers	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

17 V.S.A. § 2546	Deposit of early voter absentee ballots in ballot box	No
17 V.S.A. § 2549	Use of federal war ballot	No
17 V.S.A. § 2555	Provisional ballot envelopes	No
17 V.S.A. § 2563	Admitting voter	No
17 V.S.A. § 2564	Challenges [related to conduct of elections]	No
17 V.S.A. § 2566	Marking ballots	No
17 V.S.A. § 2568	Spoiled and unused ballots	No
17 V.S.A. § 2571	Checking voter's name upon leaving	No
17 V.S.A. § 2583	Official checklist to be tallied	Yes
17 V.S.A. § 2585	Ballots not to be written upon	No
17 V.S.A. § 2586	Secretary of state to prepare forms [related to conduct of elections]	No
17 V.S.A. § 2588	Filing returns [related to count and return of votes]	No
17 V.S.A. § 2590	Securing and storing ballots, tally sheets, and checklists	No
17 V.S.A. § 2592	Canvassing committees; canvass of votes in general or special elections	No
17 V.S.A. § 2593	Participation to be entered on statewide checklist by town clerk	No
52 U.S.C. § 20302	State responsibilities	No
52 U.S.C. § 20306	Prohibition of refusal of applications on grounds of early submission [related to voting and elections]	No
52 U.S.C. § 20701	Retention and preservation of records and papers by officers of elections; deposit with custodian; penalty for violation	No

SRS-1348.1103: Managing Local Elections

Review for Exemption?

1 V.S.A. § 315	Statement of policy [related to free and open examination of records]	Yes
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STATE OF VERMONT SPECIFIC RECORD SCHEDULE

1 V.S.A. § 316	Access to public records and documents	No
1 V.S.A. § 317	Definitions; public agency; public records and documents	Yes
1 V.S.A. § 317a	Disposition of public records	No
1 V.S.A. § 318	Procedure [related to producing records for inspection]	No
1 V.S.A. § 319	Enforcement [related to the denial of a request for public records]	No
1 V.S.A. § 320	Penalties [related to court orders for the production of any public agency records]	No
16 V.S.A. § 261	Organization and adjustment of supervisory unions	No
17 V.S.A. § 2154	Statewide voter checklist	Yes
17 V.S.A. § 2359	Notification to secretary of state [related to primary elections]	No
17 V.S.A. § 2455	Duties of election officials	No
17 V.S.A. § 2501	Determining districts [related to conduct of elections]	No
17 V.S.A. § 2508	Campaigning during polling hours; voter access	No
17 V.S.A. § 2521	Warnings and notices [related to conduct of elections]	No
17 V.S.A. § 2522	Sample ballots	No
17 V.S.A. § 2523	Posting at polling place on election day	No
17 V.S.A. § 2531	Application for early voter absentee ballot	No
17 V.S.A. § 2532	Applications; form [related to early or absentee voters]	No
17 V.S.A. § 2533	Notification of invalid application [related to early or absentee voters]	No
17 V.S.A. § 2535	Form of early voter absentee ballots and envelopes	No
17 V.S.A. § 2537	Early or absentee voting in the town clerk's office	No
17 V.S.A. § 2538	Delivery of ballots by justices of the peace	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

17 V.S.A. § 2540	Instructions to be sent with ballots	No
17 V.S.A. § 2542	Signing certificate [related to early or absentee voters]	No
17 V.S.A. § 2545	Receipt of marked ballots by town clerk; delivery to election officers	No
17 V.S.A. § 2546	Deposit of early voter absentee ballots in ballot box	No
17 V.S.A. § 2555	Provisional ballot envelopes	No
17 V.S.A. § 2563	Admitting voter	No
17 V.S.A. § 2564	Challenges [related to conduct of elections]	No
17 V.S.A. § 2566	Marking ballots	No
17 V.S.A. § 2568	Spoiled and unused ballots	No
17 V.S.A. § 2571	Checking voter's name upon leaving	No
17 V.S.A. § 2583	Official checklist to be tallied	Yes
17 V.S.A. § 2585	Ballots not to be written upon	No
17 V.S.A. § 2586	Secretary of state to prepare forms [related to conduct of elections]	No
17 V.S.A. § 2588	Filing returns [related to count and return of votes]	No
17 V.S.A. § 2590	Securing and storing ballots, tally sheets, and checklists	No
17 V.S.A. § 2593	Participation to be entered on statewide checklist by town clerk	No
17 V.S.A. § 2640a	Representative annual meetings [related to local elections]	No
17 V.S.A. § 2642	Warning and notice contents [related to local elections]	No
17 V.S.A. § 2644	Warnings [related to local elections]	No
17 V.S.A. § 2645	Charters, amendment, procedure [related to local elections]	No
17 V.S.A. § 2681	Nominations, petitions [related to local elections]	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

17 V.S.A. § 2681a	Local election ballots	No
17 V.S.A. § 2682	Process of voting; appointments [related to local elections]	No
17 V.S.A. § 2682b	Tie voted for local election	No

SRS-1689.1103: Managing Primary Elections	<i>Review for Exemption?</i>
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1 V.S.A. § 315	Statement of policy [related to free and open examination of records]	Yes
1 V.S.A. § 316	Access to public records and documents	No
1 V.S.A. § 317	Definitions; public agency; public records and documents	Yes
1 V.S.A. § 317a	Disposition of public records	No
1 V.S.A. § 318	Procedure [related to producing records for inspection]	No
1 V.S.A. § 319	Enforcement [related to the denial of a request for public records]	No
1 V.S.A. § 320	Penalties [related to court orders for the production of any public agency records]	No
17 V.S.A. § 1881a	Senatorial districts; nominations and election	No
17 V.S.A. § 2154	Statewide voter checklist	Yes
17 V.S.A. § 2357	Place of filing petition [related to primary elections]	No
17 V.S.A. § 2359	Notification to secretary of state [related to primary elections]	No
17 V.S.A. § 2360	Preservation of petitions	No
17 V.S.A. § 2362	Primary ballots	No
17 V.S.A. § 2455	Duties of election officials	No
17 V.S.A. § 2501	Determining districts [related to conduct of elections]	No
17 V.S.A. § 2508	Campaigning during polling hours; voter access	No
17 V.S.A. § 2521	Warnings and notices [related to conduct of elections]	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

17 V.S.A. § 2522	Sample ballots	No
17 V.S.A. § 2523	Posting at polling place on election day	No
17 V.S.A. § 2531	Application for early voter absentee ballot	No
17 V.S.A. § 2532	Applications; form [related to early or absentee voters]	No
17 V.S.A. § 2533	Notification of invalid application [related to early or absentee voters]	No
17 V.S.A. § 2535	Form of early voter absentee ballots and envelopes	No
17 V.S.A. § 2537	Early or absentee voting in the town clerk's office	No
17 V.S.A. § 2538	Delivery of ballots by justices of the peace	No
17 V.S.A. § 2540	Instructions to be sent with ballots	No
17 V.S.A. § 2542	Signing certificate [related to early or absentee voters]	No
17 V.S.A. § 2545	Receipt of marked ballots by town clerk; delivery to election officers	No
17 V.S.A. § 2546	Deposit of early voter absentee ballots in ballot box	No
17 V.S.A. § 2549	Use of federal war ballot	No
17 V.S.A. § 2555	Provisional ballot envelopes	No
17 V.S.A. § 2563	Admitting voter	No
17 V.S.A. § 2564	Challenges [related to conduct of elections]	No
17 V.S.A. § 2566	Marking ballots	No
17 V.S.A. § 2568	Spoiled and unused ballots	No
17 V.S.A. § 2571	Checking voter's name upon leaving	No
17 V.S.A. § 2583	Official checklist to be tallied	Yes
17 V.S.A. § 2585	Ballots not to be written upon	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

17 V.S.A. § 2586	Secretary of state to prepare forms [related to conduct of elections]	No
17 V.S.A. § 2588	Filing returns [related to count and return of votes]	No
17 V.S.A. § 2590	Securing and storing ballots, tally sheets, and checklists	No
17 V.S.A. § 2592	Canvassing committees; canvass of votes in general or special elections	No
17 V.S.A. § 2593	Participation to be entered on statewide checklist by town clerk	No
52 U.S.C. § 20302	State responsibilities	No
52 U.S.C. § 20306	Prohibition of refusal of applications on grounds of early submission [related to voting and elections]	No
52 U.S.C. § 20701	Retention and preservation of records and papers by officers of elections; deposit with custodian; penalty for violation	No

SRS-1714.1000: Municipal Clerk Transitory Records	<i>Review for Exemption?</i>
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1 V.S.A. § 315	Statement of policy [related to free and open examination of records]	Yes
1 V.S.A. § 316	Access to public records and documents	No
1 V.S.A. § 317	Definitions; public agency; public records and documents	Yes
1 V.S.A. § 317a	Disposition of public records	No
1 V.S.A. § 318	Procedure [related to producing records for inspection]	No
1 V.S.A. § 319	Enforcement [related to the denial of a request for public records]	No
1 V.S.A. § 320	Penalties [related to court orders for the production of any public agency records]	No

SRS-1319.1109: Voter Registration Records	<i>Review for Exemption?</i>
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1 V.S.A. § 315	Statement of policy [related to free and open examination of records]	Yes
1 V.S.A. § 316	Access to public records and documents	No
1 V.S.A. § 317	Definitions; public agency; public records and documents	Yes

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

1 V.S.A. § 317a	Disposition of public records	No
1 V.S.A. § 318	Procedure [related to producing records for inspection]	No
1 V.S.A. § 319	Enforcement [related to the denial of a request for public records]	No
1 V.S.A. § 320	Penalties [related to court orders for the production of any public agency records]	No
11 CFR 9428.2	Definitions [related to national voter registration act]	No
11 CFR 9428.3	General information [related to national mail voter registration form]	No
11 CFR 9428.4	Contents [related to national mail voter registration form]	No
11 CFR 9428.5	Format [related to national mail voter registration form]	No
17 V.S.A. § 2122	Residence; special cases; checklist	No
17 V.S.A. § 2123	Residents of unorganized towns and gores	No
17 V.S.A. § 2124	Voter's oath or affirmation; how administered	No
17 V.S.A. § 2126	Village checklist	No
17 V.S.A. § 2144	Deadline for applications	No
17 V.S.A. § 2144a	Registration [related to persons eligible to vote]	No
17 V.S.A. § 2144b	Additions to checklist by town clerk	No
17 V.S.A. § 2145	Application forms	No
17 V.S.A. § 2145a	Registrations at the department of motor vehicles	No
17 V.S.A. § 2145b	Voter registration agencies	No
17 V.S.A. § 2145c	Submission of voter registration forms by other persons or organizations	No
17 V.S.A. § 2146	Action of board of civil authority	No
17 V.S.A. § 2147	Alteration of checklist	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

17 V.S.A. § 2149	Conclusiveness of list [related to voter registration checklist]	No
17 V.S.A. § 2150	Removing names from checklist [related to registered voters]	No
17 V.S.A. § 2151	Federal district court [related to qualification and registration of voters]	No
17 V.S.A. § 2152	Division of checklist	No
17 V.S.A. § 2154	Statewide voter checklist	Yes
17 V.S.A. § 2358	Examining petitions, supplementary petitions	No
17 V.S.A. § 2532	Applications; form [related to early or absentee voters]	No
52 U.S.C. § 10101	Voting rights	No
52 U.S.C. § 20302	State responsibilities	No
52 U.S.C. § 20306	Prohibition of refusal of applications on grounds of early submission [related to voting and elections]	No
52 U.S.C. § 20503	National procedures for voter registration for elections for federal office	No
52 U.S.C. § 20504	Simultaneous application for voter registration and application for motor vehicle driver's license	No
52 U.S.C. § 20505	Mail registration	No
52 U.S.C. § 20506	Voter registration agencies	No
52 U.S.C. § 20507	Requirements with respect to administration of voter registration	No
52 U.S.C. § 20508	Federal coordination and regulations [related to voting assistance and election administration]	Yes
52 U.S.C. § 20701	Retention and preservation of records and papers by officers of elections; deposit with custodian; penalty for violation	No
52 U.S.C. § 20702	Theft, destruction, concealment, mutilation, or alteration of records or papers; penalties	No
52 U.S.C. § 20703	Demand for records or papers by Attorney General or representative; statement of basis and purpose	No

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

52 U.S.C. § 21083

Computerized statewide voter registration list requirements and requirements for voters who register by mail

Yes