

STATE OF VERMONT SPECIFIC RECORD SCHEDULE

Issued to: Military Department

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Vermont State Archives and Records Administration

Vermont Office of the Secretary of State

AGENCY SPECIFIC RECORD SCHEDULE FOR: Military Department

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, as defined in 3 V.S.A. § 117(a)(6), that has been approved by the State Archivist. (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 (Military Department) 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 that clearly states 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. Duplicates or copies of records shall not be retained longer than the original records.

Adopted by: Signature on file. Approved and signed by Deputy Adjutant General Henry Harder on 11/04/2024
Henry Harder, Deputy Adjutant General / Military Department *Date*

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SRS-2132.1180: Veterans' Burial Benefit Records

SRS-2132.1180: This schedule is reserved for recorded evidence of activities and transactions that relate to or affect, in a specific manner, the disbursement, including reimbursement, of payments related to Veterans' burial benefits.

Classification: Burial benefits (Disbursing)

Retention: Retain all records listed on this schedule, except registers, until the burial benefit is completed/closed, plus two (2) years, then destroy. Completed/closed means the benefit contract is completed, and all benefit claims are paid.

Registers shall be retained until superseded with all required data types and data elements documented to ensure proper retention and preservation actions. Documentation shall also contain non-required data types and data elements, which shall be reviewed for continuing value prior to any data migrations relating to registers.

Other records shall be retained as specified in this schedule with the exception of transitory records. Transitory records created or received may be weeded as appropriate in accordance with GRS-1000.1000 (Transitory Records).

SPECIFIC RECORDKEEPING REQUIREMENTS for SRS-2132.1180 (see APPENDIX E for related legal references)

Record Category/Type:	Applicability/Use:	Appraised Value:	Retention/Disposition:
SRS-2132.1180.5 Agreements Public Access: <i>General</i>	Use for agreements related to burial benefits. Includes signed contracts with Veterans and/or their beneficiaries and significant supporting material.	Temporary (Administrative)	RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)
SRS-2132.1180.141 Authorizations Public Access: <i>General</i>	Use for authorizations related to burial benefits. Includes pre-approval letters and significant supporting material.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)
SRS-2132.1180.32 Declarations Public Access: <i>General</i>	Use for itemized statements of burial benefit claims and disbursement, including reimbursement, of payments made by the State. Includes claims made on behalf of a Veteran and/or their beneficiaries.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)

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SRS-2132.1180.50	Use for official, written statements, notices, or announcements that are required by law. Includes notices from the U.S. Department of Veterans' Affairs, the Chief Medical Examiner and/or funeral directors.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 1 Year(s) THEN: Destroy (General)
Notices, Legal			
Public Access: <i>General</i>			
SRS-2132.1180.81	Use for registers, databases and similar systems that provide for the systematic and regular recording of burial benefit activities.	Conditional Archival	RETAIN UNTIL: Superseded PLUS: 0 Year(s) THEN: Confirm
Registers			
Public Access: <i>Review</i>			
SRS-2132.1180.144	Use for reports related to burial benefit claims and disbursement, including reimbursement, of payments.	Temporary (Administrative)	RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)
Reports			
Public Access: <i>General</i>			
SRS-2132.1180.139	Use for prior authorization requests and similar requests made by or on behalf of Veterans and their beneficiaries related to burial benefit claims and disbursement, including reimbursement, of payments. Includes requests for headstones, markers and similar records.	Temporary (Legal)	RETAIN UNTIL: Completed/Closed PLUS: 2 Year(s) THEN: Destroy (General)
Requests			
Public Access: <i>General</i>			

SRS-2132.1180 was approved by the Vermont State Archivist on 10/29/2024.

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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.

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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.

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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.

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Appendix E: Legal References

SRS-2132.1180: Veterans' Burial Benefit Records		<i>Review for Exemption?</i>
18 V.S.A. § 5227	Right to disposition [related to deaths, burials, autopsies]	No
20 V.S.A. § 1483	Adjutant General; duties as to veterans' affairs	No
20 V.S.A. § 1582	Rules [related to Vermont Veterans' Memorial Cemetery]	No
20 V.S.A. § 1586	Interment of unclaimed remains of veterans	No
38 CFR 3.1703	Claims for burial benefits	No
38 CFR 3.1707	Plot or interment allowances for burial in a State veterans cemetery or other cemetery	No
38 CFR 38.617	Prohibition of interment or memorialization of persons who committed certain Federal or State crimes	No
38 CFR 38.630	Burial headstones and markers; medallions	No