

Purpose

The committee met to review, discuss, and vote on the following records retention schedule drafts, as submitted by the pre-Records Oversight Committee.

- 154-010 , Department of Motor Vehicles, Vehicle Services
- 154-011, Department of Motor Vehicles, Data and Records Services
- 154-021, Department of Motor Vehicles, Driver Services
- 154-143, Department of Motor Vehicles, Law Enforcement Services
- 154-156, Department of Motor Vehicles, Legal Affairs
- 222-001, Department of Professional and Occupational Regulation
- 260-001, Virginia Community College System, Facilities Management
- 409-009, Department of Energy, Gas and Oil
- 501-018, Virginia Department of Transportation, Maintenance Division
- 501-080, Virginia Department of Transportation, Tolling Operations EZ Pass
- 720-001, Department of Behavioral Health and Developmental Services
- GS-05, All Localities, Assessment Records
- GS-15, All Localities, Social Services
- GS-16, All Localities, General Services Records
- GS-17, All Localities, Law Enforcement, Fire and Emergency Services
- GS-117, All State Agencies, Law Enforcement
- GS-106, All Localities, General Services
- GS-120, All State Agencies, Health Records
- GS-129, All State Agencies, Criminal Justice Services Training Academy

Introduction of Members and Guests

Greg Crawford called the meeting to order at 9:02 a.m. Members present introduced themselves.

Members Present:

Vince Brooks, Local Records Program Manger
Greg Crawford, State Archivist and Government Records Services Director
Cara Griggs, Senior Reference Archivist
Eric Harris, Records Management Analyst
Emily Johnson, Records Management Analyst
Chad Owen, Records Management Section Manager
Teshawna Threat, Records Management Analyst
Eddie Woodward, Local Records Archivist

Members Absent:

Paige Neal, State Records Archivist

Resources:

Karen King, State Records Archivist
Patrice Morgan, Administrative Assistant

Guests:

None

Agenda

Greg Crawford called for a motion to approve the agenda. Teshawna Threat so moved, seconded by Vince Brooks, and the motion carried.

Minutes of Prior Meeting

Greg Crawford called for a motion to approve the Minutes of September 11, 2025.

[Motion: Greg called for a motion to approve the minutes of September 11, 2025. Vince Brooks so moved. Chad Owen seconded, and the motion carried.]

Old Business

Update on GS-15: Emily Johson informed the committee a representative from Department of Aging Rehabilitative Services contacted her relay a concern about series 200786, Family Services: Adult Services/Adult Protective Services Guardianships following approval. The concern was that the guardianship series should not be approved by a Social Services panel. The series was removed in accordance with this concern. A different series was updated for Family Services to include guardianship language. The update was done in coordination with Department of Aging and Rehabilitative Services and the panel. This update is to acknowledge for the record that series 200786 approved by the committee at the previous meeting has been removed and a series was updated to include information for guardianship. No vote needed for these changes.

154-010, Department of Motor Vehicles, Vehicle Services

Teshawna Threat presented this schedule. This is an existing agency-specific schedule. The commissioner reorganized the agency. The agency is requesting that the schedule name be changed due to a reorganization of divisions at the agency. The change proposed is as follows:

Specific-Schedule Title Change:

Vehicle Services changing to Dealer & Vehicle Services

[Motion: Greg Crawford called for a motion to approve Schedule 154-010. Chad Owen so moved, Eric Harris seconded, and the motion carried.]

154-011, Department of Motor Vehicles, Data and Records Services

Teshawna Threat presented this schedule. This is an existing agency-specific schedule. The agency is requesting for the specific schedule name to be changed due to division reorganization, an update to two series titles and series descriptions to be ShelfLife compliant, and one series is being transferred from another DMV-specific schedule to this schedule. The change proposed is as follows:

Specific-Schedule Title Change:

Data and Records Services changing to Records Access Management.

One (1) Series Transferred

Records Series 005079—transferring from 154-021, Driver Services to this schedule and the series title and description language updated to make Shelf life compliant.

Two (2) updates to Titles and/or Descriptions (2)

Language for records series 005296 and 200827 made Shelf-Life compliant.

[**Motion:** Greg Crawford called for a motion to approve Schedule 154-011. Cara Griggs so moved, Emily Johnson seconded, and the motion carried.]

154-021, Department of Motor Vehicles, Driver Services

Teshawna Threat presented this schedule. This is an existing agency-specific schedule. The agency is requesting for one series to be transferred from this schedule to the 154-011, Data and Records Services schedule. The change proposed is as follows:

One (1) Records Series Transferred

Series 005079 is being transferred from this schedule to schedule 154-011.

[**Motion:** Greg Crawford called for the motion to approve Schedule 154-021. Chad Owen so moved, Eric Harris seconded, and the motion carried.]

154-143, Department of Motor Vehicles, Law Enforcement Services

Teshawna Threat presented this schedule. This is an existing agency-specific schedule. The agency is requesting that the schedule name be changed due to a reorganization of divisions at the agency. The change proposed is as follows:

Specific-Schedule Title Change

Law Enforcement Services changing to Law Enforcement & Highway Safety.

[**Motion:** Greg Crawford called for a motion to approve Schedule 154-143. Vince Brooks so moved, Chad Owen seconded, and the motion carried.]

154-156, Department of Motor Vehicles, Legal Affairs

Teshawna Threat presented this schedule. This is an existing agency-specific schedule. The agency is requesting for the specific schedule name to be changed due to division reorganization. The change proposed is as follows:

Specific-Schedule Title Change

Legal Affairs changing to Legal & Legislative Affairs.

[**Motion:** Greg Crawford called for a motion to approve Schedule 154-156. Eric Harris so moved, Cara Griggs seconded, and the motion carried.]

260-001, Virginia Community College System, Facilities Management

Teshawna Threat presented this schedule. This is an existing agency-specific schedule last approved in 2011. The schedule was reviewed by the agency, and changes were recommended by Teshawna Threat, which were approved by the agency. The recommended changes are to make the series descriptions and titles ShelfLife-compliant. The change proposed is as follows:

Updates to Titles and/or Descriptions (7)

Update to the series title:

Capital Outlay Project: Development and Review Documents, 002880.

Update to the title and description:

Capital Outlay Project: Approval and Contract Documents, 002879.

Drawings and Specifications - In- progress, 009158.

Proposals and Statement of Qualifications, 002884.

Update to the series description:

Capital Outlay Project: Master Plans/Stormwater Management, 002881.

Capital Outlay Project: Working Documents, 002883.

Statement of Qualifications: Small Purchases, 02885.

[**Motion:** Greg Crawford called for a motion to approve Schedule 260-001. Chad Owen so moved, Vince Brooks seconded, and the motion carried.]

501-018, Department of Transportation, Maintenance Division

Teshawna Threat presented this schedule. This is an existing agency-specific schedule. The agency has requested to reactivate a series previously made defunct, not superseded in December 2024, in addition to modifying the series description and retention.

The change proposed is as follows:

One (1) Series Activation and Update to Retention

Video Tapes and Logs, 004127; Retention changed from 3 years after receipt to 0 years after no longer administratively useful

[**Motion:** Greg Crawford called for a motion to approve Schedule 501-018. Eric Harris so moved, Emily Johnson seconded, and the motion carried.]

501-080, Department of Transportation, Tolling Operations EZ Pass

Teshawna Threat presented this schedule. This is an existing agency-specific schedule. The agency has requested a change in retention for one series. The change proposed is as follows:

One (1) Requests for updates to Retention

Series 000055 retention changed from 1 year after event to 0 years after no longer administratively useful

[**Motion:** Greg Crawford called for a motion to approve Schedule 501-080. Cara Griggs so moved, Chad Owen seconded, and the motion carried.]

GS-16, All Localities, General Services Records and GS-106, All State Agencies, General Services

Teshawna Threat presented these schedules. These are both existing general schedules. Local and state agencies have Construction Stormwater Permit Compliance and Inspections and Erosion and Sediment Control and Stormwater Management certificates issued by the Department of Environmental Quality (DEQ). The Department of Environmental Quality retains a record copy of the same record types and confirms records are maintained by local sites as well. The series mirrors the series on DEQ schedule 440-018. The proposed changes include adding two series for the record copies kept at state and local facilities. Additionally, proposing a retention change for Security Visitor Access Control records per request. The changes proposed are as follows:

Two (2) New Series for both schedules

Construction Stormwater Permit Compliance and Inspections: Record Copy and Erosion and Sediment Control and Stormwater Management: Certifications (Record Copy).

Requests for updates to Retention

Security: Visitor Access Control Records (GS-16 - 005242 and GS-106 - 200734): Changing retention from 1 year after no longer administratively useful to 6 months after no longer administratively useful.

[**Motion:** Greg Crawford called for a motion to approve General Schedules 16 and GS-106. Vince Brooks so moved, Eddie Woodward seconded, and the motion carried.]

222-001, Department of Professional and Occupational Regulation

Eric HARRIS presented this schedule. This is an existing agency-specific schedule. The agency has requested two series be made defunct and superseded, three series retention changes and one series

description change. There are ten series that were made ShelfLife compliant. The change proposed is as follows:

Two (2) Series Defunct, Superseded

200119 made defunct and superseded by 222-001.100010.

200669 made defunct and superseded by 222-001.100010.

Three (3) Updates to retention

100010 retention changed from 1 year after closed to 3 years after closed.

009110 retention changed from 1 year after closed to 3 years after closed.

015295 retention changed from 1 year after closed to 3 years after closed.

Three (3) Updates to Titles and/or Descriptions

100010 Update to title and description.

009110 Update to description.

015295 Update to title and description.

Ten (10) series updated -ShelfLife Compliant

100001, 100002, 100007, 009111, 100005, 100006, 100008, 100009, 100013, 100015.

[**Motion:** Greg Crawford called for a motion to approve Schedule 222-001. Chad Owen so moved, Teshawna Threat seconded, and the motion carried.]

409-009, Department of Energy

Eric Harris presented this schedule. This is an existing agency-specific schedule. The agency has requested four series retention changes and five series title change. There are four series that were made ShelfLife compliant. The change proposed is as follows:

Updates(4) to retention

005044 retention changed from 3 years after last action to Permanent, In Agency.

005050 retention changed from 3 years after last action to Permanent, In Agency.

005051 retention changed from 2 years after last action to Permanent, In Agency.

005053 retention changed from 5 years after last action to Permanent, In Agency.

Updates (5) to Titles and/or Descriptions

005044, 005044 Update to title and description.

005048 Update to title and description.

005050 Update to title.

005051 Update to title and description.

005053 Update to title.

ShelfLife Compliant

005045, 005046, 005047, 005043, 005049.

[**Motion:** Greg Crawford called for a motion to approve Schedule 409-009. Vince Brooks so moved, Chad Owen seconded, and the motion carried.]

GS-05, All Localities, Assessment Records

Eric Harris presented this schedule. This is an existing general schedule. The proposed changes include adding one series to account for tax relief for disabled military veterans and their spouses. The retention 5 years same as for Real Estate: Tax Relief for the Elderly and the Handicapped series on GS-5. A disposition update for one series. The change proposed is as follows:

One (1) New Series

Tax Relief: Disabled Military Veterans.

Requests for one (1) update to Disposition

010275, Real Estate: Tax Relief for the Elderly and the Handicapped disposition changing from confidential to non-confidential.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 05. Teshawna Threat so moved, Cara Griggs seconded, and the motion carried.]

720-001, Department of Behavioral Health and Developmental Services

Emily Johnson presented this schedule. Panelists have requested sixteen series be made defunct/superseded, one series has been defunct/not superseded, two series to have altered titles/descriptions, and one series to have an altered disposition method. The schedule was last updated in 2013 and is both out-of-date and did not include many facilities when it was created. The new disposition method is due to the importance of admission/discharge information for Master Patient Index (MPI) purposes. The requested updates are as follows:

Two (2) Requests for Updates to Titles/Descriptions

Admission Discharge Transfer (ADT): Records and Reports (000409) description updated to account for merged series.

Psychological Protocol (000434) description updated for more inclusive and clear language.

Sixteen (16) Requests for Series to be made Defunct/Superseded

Admission Register (000408) superseded by Admission Discharge Transfer (ADT): Records and Reports (000409).

Autoclave Sterilization Records (000410) superseded by GS-120's Equipment Sterilization Records (005320).

Compliance Records (000412) superseded by GS-120's Compliance Records (200344).

Electroencephalogram (EEG) Tracings (000414) superseded by GS-120's Diagnostic Testing and Imaging Records (200343).

Index: Master Patient (000417) superseded by GS-120's Master Patient Index (MPI) (005340).

Laboratory: Quality Control Records (000420) superseded by GS-120's Laboratory: Quality Assurance and Quality Control Records (005336).

Laboratory: Reports (000421) superseded by GS-120's Laboratory: General Reports (005334).

Laboratory: Specimen Logs – Pathology (000422) superseded by GS-120's Laboratory: Requisitions, Worksheets and Logs (005335).

Operating Room (000425) superseded by GS-120's Procedure Records: Medical (200364).

Patient/Resident Medical Records: Deceased (000426) superseded by GS-120's Patient

Medical/Dental Records: Adults (012504).

Patient/Resident Medical Records: Discharged Adults (000427) superseded by GS-120's Patient Medical/Dental Records: Adults (012504).

Patient/Resident Medical Records: Discharged Minors (015050) superseded by GS-120's Patient Medical/Dental Records: Minors (012503).

Pharmacy: Medication Requisitioning and Dispensing Records (000430) superseded by GS-120's

Pharmacy: Distribution, Requisition and Prescription Records (200362).

Pharmacy: Medication Site Inspections (000431) superseded by GS-120's Permit Review Files (005351).

Pharmacy: Prescriptions (000432) superseded by GS-120's Pharmacy: Distribution, Requisition and Prescription Records (200362).

Radiology: X-Ray Film (000436) superseded by GS-120's Diagnostic Testing and Imaging Records (200343).

One (1) Request for Series to be made Defunct/Not Superseded

Waiver Children's Records - Developmental Disabilities Waiver (WCR-DD) (009576).

One (1) Request for Retention Updates

Admission Discharge Transfer (ADT): Records and Reports (000409) from 5 years after creation to Permanent, In-Agency.

[**Motion:** Greg Crawford called for a motion to approve Schedule 720-001. Eric Harris so moved, Chad Owen seconded, and the motion carried.]

GS-15, All Localities, Social Services Records

Emily Johnson presented this schedule. Panelists have requested updated language to thirteen series. The requested update is as follows:

Thirteen (13) Requests for Updates to Titles/Descriptions

Adding “appeals” to the descriptions of the following series:

- Family Services: Child Protective Services (CPS) Cases - Founded with Multiple Complaints (101023).
- Family Services: Child Protective Services (CPS) Cases - Founded, Level 1 (101020).

- Family Services: Child Protective Services (CPS) Cases - Founded, Level 1 - Sexual Abuse, After June 30, 2010 (000508).
- Family Services: Child Protective Services (CPS) Cases - Founded, Level 1 - Sexual Abuse, Before July 1, 2010 (200732).
- Family Services: Child Protective Services (CPS) Cases - Founded, Level 2 (101021).
- Family Services: Child Protective Services (CPS) Cases - Founded, Level 3 (101022).
- Family Services: Child Protective Services (CPS) Cases - Founded, Pre-1992 (000172).
- Family Services: Child Protective Services (CPS) Cases – Invalid (200729).
- Family Services: Child Protective Services (CPS) Cases - Unfounded, No Request to Maintain File, After June 30, 2020 (101016).
- Family Services: Child Protective Services (CPS) Cases - Unfounded, No Request to Maintain File, Before July 1, 2020 (200730).
- Family Services: Child Protective Services (CPS) Cases - Unfounded, Request to Maintain File, After June 30, 2020 (101017).
- Family Services: Child Protective Services (CPS) Cases - Unfounded, Request to Maintain File, Before July 1, 2020 (200731).
- Family Services: Service Cases - Child Protective Services (CPS) (000171).

[**Motion:** Greg Crawford called for a motion to approve General Schedule 15. Teshawna Threat so moved, Eric Harris seconded, and the motion carried.]

GS-17, All Localities, Law Enforcement and GS-117, All State Agencies, Law Enforcement

Emily Johnson presented these schedules. Panelists have requested updated title for one series to mirror current practices and law. The requested updates are as follows:

One (1) Request for Updates to Titles/Descriptions

Fingerprints and Photographs (GS-17-200144 and GS-117-200109) renamed as Pre-1974: Fingerprints and Photographs.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 17 and General Schedule 117. Chad Owen so moved, Cara Griggs seconded, and the motion carried.]

GS-120, All State Agencies, Health Records

Emily Johnson presented this schedule. VDH has requested a title change to one existing series to generalize it and DBHDS (with approval by UVA Health, VCU Health, and VDH) has requested an update in the retention/disposition method for one series. The requested updates are as follows:

One (1) Request for Updates to Titles/Descriptions

Vital Records: Applications for Death Certificates (200380) renamed as Vital Records: Applications, description updated to match generalization.

One (1) Request for Retention Updates

Master Patient Index (MPI) (005340) from 100 years after last action to Permanent, In-Agency.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 120. Vince Brooks so moved, Eric Harris seconded, and the motion carried.]

GS-129, All State Agencies, Criminal Justice Services Training Academy

Emily Johnson presented this schedule. Panelists have requested updated language to two series, one new series, and updated retentions/cutoffs to three series. Panelists believe that the current retentions are overly burdensome given high turnover at most correctional facilities, and a new series was warranted due to a difference in retention needs between training data available in a specialized database and that which is available elsewhere. The requested updates are as follows:

One (1) New Series

Student Records: Digital Training Record Data.

Two (2) Requests for Updates to Titles/Descriptions

Class/Session Files (200398) to be renamed Class/Session Records: Basic Training.

Class/Session Files: In-Service and Miscellaneous (200399) to be renamed Class/Session Records: In-Service and to receive updated description.

Three (3) Requests for Retention Updates

Class/Session Files (200398) from 50 years after calendar year to 20 years after event.

Instructor Records (200400) from 25 years after separation to 20 years after separation.

Student Records (200402) from 50 years after graduation/withdrawal to 20 years after event.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 129. Cara Griggs so moved, Teshawna Threat seconded, and the motion carried.]

New Business

GS-111, Student Health: Patient Medical Records

Teshawna provided this update. University of Virginia representative recommended a language change for series 101189 (Student Health: Patient Records) to account for how sexual assault records are managed/kept by the UVA medical department. The recommendation is to add “excluding sexual assault records” to the current series description to distinguish that the university is not keeping sexual assault records as part of the series. Since this is a minor change for clarification, the information will be added to ShelfLife and not presented in full schedule format. This update is to note this change for the record.

Department of Transportation Schedules: 501-005 and 501-031

Teshawna informed the committee the schedules were made defunct in 2006. However, schedule 501-005 is still showing as active in the system. Schedule 501-031 was made defunct, but the series

remained active. This will be corrected to show the schedules and series are defunct, and series superseded. This update is for the record.

Update of RM-19 and Policies for RM 19 and General Schedules

Teshawna explained the RM-19 has been updated to boost transparency. The form has been updated to include signature locations for the records officer and agency head. This will show both have reviewed RM-19. This change will roll out January 1.

The RM-19 policy was updated with language that new RM-19 forms cannot be submitted if an agency has a schedule pending signature.

Adjournment

Teshawna provided tentative dates for the next meetings March 12, June 11, September 10 and December 10, 2026. Teshawna will send the meeting invites. Greg Crawford called for a motion to adjourn. Teshawna Threat so moved; Vince Brooks seconded. The next meeting is tentatively scheduled for March 12, 2026, pending confirmation by invite.