Records Management Oversight Committee Meeting

Library of Virginia, Conference Room 5.041
June 11, 2026

Purpose

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

- 100-001, Senate of Virginia
- 152-007, Department of Treasury
- 158-New, Virginia Retirement System
- 171-192, State Corporation Commission
- 207-020, University of Virginia
- 501-007, Virginia Department of Transportation
- 602-006 / 602-010, Department of Medical Assistance Services
- 602-015, Department of Medical Assistance Services
- 751-001, Virginia Department of Deaf and Hard of Hearing
- GS-03, County and Municipal Governments, Personnel Records
- GS-06, County and Municipal Governments, Land Use, Land Development and Public Works
- GS-15, County and Municipal Governments, Social Services
- GS-16, County and Municipal Governments, General Services
- GS-17, County and Municipal Governments, Law Enforcement
- GS-117, All State Agencies, Law Enforcement
- GS-19, County and Municipal Governments Agencies, Administrative Records
- GS-21, County and Municipal Governments, Public Schools
- GS-29, County and Municipal Governments, Criminal Justice Training Academy
- GS-31, County and Municipal Governments, Airports
- GS-101, All State Agencies, Administrative Records
- GS-103, County and Municipal Governments, Personnel Record
- GS-108, All State Agencies, Fire, Safety, Security
- New Schedule, Virginia Birth Injury Fund
- New Schedule, Virginia Department of Emergency Management, Emergency Management General
- New Schedule, Virginia Department of Emergency Management, Special Operations
- New Schedule, Virginia Department of Emergency Management, Training Exercise Education

Introduction of Members and Guests

Greg Crawford called the meeting to order. Members and guests introduced themselves.

Members Present:

Vince Brooks, Local Records Program Manger
Greg Crawford, State Archivist and Government Records Services Director

Eric Harris, Records Management Analyst
Emily Johnson, Records Management Analyst
Amanda Morrell, Senior Reference Archivist
Chad Owen, Records Management Coordinator
Maria Shellman, State Records Archivist
Teshawna Threat, Records Management Analyst

Members Absent:

Caroline Collins, Local Records Archivist

Resources:

Patrice Morgan, Administrative Assistant

Guests:

Meg Ryan Guthorn, Deputy State Librarian of Virginia
Abbey Perea, LIS Student at Louisiana State University. Teacher in Texas

Agenda

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

Minutes of Prior Meeting

[**Motion:** Greg Crawford called for a motion to approve the Minutes of March 12, 2026. Chad Owen so moved. Eric Harris seconded, and the motion carried.]

Old Business

None.

Schedule Presentations

Presenting Analyst: Chad Owen

Chad Owen presented one agency specific schedule to the Records Management Oversight Committee. The changes proposed for approval follow:

100-001: Senate of Virginia

Four Series Permanent, Archives: 100573, 100575, 100576, 100577
One Series Permanent in Agency: 100574,
One Series Nonpermanent: 100572
All (six) series made ShelfLife compliant.

[**Motion:** Greg Crawford called for a motion to approve schedule 100-101. Emily Johnson so moved, Teshawna Threat seconded, and the motion carried.]

Presenting Analyst: Eric Harris

Eric presented three state-specific schedules to the Records Oversight Committee. The changes proposed for approval follow:

152-007, Department of Treasury, Debt Management

One series cutoff event change: 009280.

[**Motion:** Greg Crawford called for a motion to approve Schedule 152-007. Chad Owen so moved, Vince Brooks seconded, and the motion carried.]

158-New, Virginia Retirement System

New schedule with seven new series: Audit Work Papers: Advisory Projects, Audit Work Papers: Assurance, Audit Work Papers: Limited Assurance, Quality Assurance, Audit Final Reports, Audit Plans: Annual, Audit Plans: Long-Range.

[**Motion:** Greg Crawford called for a motion to approve Schedule 158-new [to be numbered]. Teshawna Threat so moved, Chad Owen seconded, and the motion carried.]

171-192, State Corporation Commission, Bureau of Insurance - Administrative Tax Unit

One series defunct/not superseded: 005518.
Two series retention changes: 101335, 005519.

[**Motion:** Greg Crawford called for a motion to approve Schedule 171-192. Chad Owen so moved, Amanda Morrell seconded, and the motion carried.]

Presenting Analyst: Teshawna Threat

Teshawna Threat presented two state-specific and four general schedules to the Records Oversight Committee. The changes proposed for approval follow:

207-020, University of Virginia, All Agency

One new series: Faculty and Employee Assistance Program (FEAP) Records description change.

Teshawna responded to a question if a new records officer has been designated for UVA.

[**Motion:** Greg Crawford called for a motion to approve 207-020. Chad Owen so moved, Eric Harris seconded, and the motion carried.]

501-007, Transportation, Department of

One series retention change: 001402.

[**Motion:** Greg Crawford called for a motion to approve 501-007. Emily Johnson so moved, Vince Brooks seconded, and the motion carried.]

GS-19, County and Municipal Governments, Administrative Records

One series description change: 200564.
One series retention change: 010026.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 19. Chad Owen so moved, Eric Harris seconded, and the motion carried.]

GS-21, Public Schools

Eighty-three series descriptions and titles made ShelfLife compliant.
Five series retention changes: 008197, 008226, 008230, 008232, 200315.
Four series defunct, superseded: 008196, 008219, 200018, 200683.
Five new series: Special Education Records: Supporting Observations, School Safety Audits: Local Division Record Copy, School Safety Audits: Supporting Reports, User Agreements , Threat Assessments: Separated Post-June 30, 2024

Teshawna collaborated with the Public Schools Records Consortium (Public Schools Records Officers) regarding the changes to this schedule.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 21. Eric Harris so moved, Amanda Morrell seconded, and the motion carried.]

GS-31, Airports

Fourteen series changes to be ShelfLife compliant: 006166, 006167, 006168, 006169, 006172, 006173, 006174, 006175, 006177, 006178, 006179, 006180, 006181 ,006182.

Four series disposition method changes from Permanent, Archives to Permanent, In Agency: 006166, 006168, 006174, 006178.
Three series defunct, superseded to GS-19: 006170, 006171, 006176.
One series defunct not, superseded: 006183.

Three new series Abandoned or Derelict Aircraft, Security Identification Display Area (SIDA) Badges: Audits, and Security Identification Display Area (SIDA) Badges: Background Checks.

Teshawna developed a focus group and consulted with the group and Federal Aviation Administration on the schedule changes.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 31. Eric Harris so moved, Vince Brooks seconded, and the motion carried.]

GS-101, All State Agencies, Administrative

Two series defunct, superseded: 100334, 100345.
One series description change: 200550.
One series retention change: 012080.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 101. Chad Owen so moved, Emily Johnson seconded, and the motion carried.]

Presenting Analyst: Emily Johnson

Emily presented eight state-specific and nine general schedules to the Records Oversight Committee. The changes proposed for approval follow:

602-006, Department of Medical Assistance Services Appeals-Client and 602-010, Department of Medical Assistance Services, Appeals

602-006

Schedule made defunct/superseded by 602-010 .
One series moved to 602-010: 015010 records series description added and title updated.

[**Motion:** Greg Crawford called for a motion to approve Schedule 602-006. Teshawna Threat so moved, Eric Harris seconded, and the motion carried.]

602-010

One new series moved from 602-006: 015010.

[**Note:** A separate motion was not called for this schedule.]

602-015, Department of Medical Assistance Services, Fiscal and Accounting

Schedule made defunct/superseded: single series 006193 superseded by GS-102, 012108.

[**Motion:** Greg Crawford called for a motion to approve Schedule 602-015. Chad Owen so moved, Eric Harris seconded, and the motion carried.]

751-001, Department of Deaf and Hard of Hearing, All Agency

Three series descriptions, titles clarified, cutoff events changed, made ShelfLife compliant: 100404, 100405, 100406.

[**Motion:** Greg Crawford called for a motion to approve Schedule 751-001. Eric Harris so moved, Vince Brooks seconded, and the motion carried.]

GS-03, County and Municipal Governments, Personnel Records

One new series: Family and Medical Leave Act (FMLA) Records.

The committee discussed a question about FMLA regulations.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 03. Eric Harris so moved, Amanda Morrell seconded, and the motion carried.]

GS-06, County and Municipal Governments, Land Use, Land Development and Public Works

One series description, retention and disposition method change: 000554.

Emily explained the disposition method changed to Permanent, In Agency. Other states schedules were researched regarding the series. The retention is consistent with other states series. The committee discussed the disposition whether Permanent, In Agency, captures historical content if disposition changes or records digitized, and any barrier to or any comment related to public access.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 06. Chad Owen so moved, Teshawna Threat seconded, and the motion carried.]

GS-15, County and Municipal Governments, Social Services

Two series made defunct/not superseded: 200737, 200738.

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

GS-16, County and Municipal Governments, General Services

One series title and description change: 005243.
One series made defunct/superseded: 005245.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 16. Chad Owen so moved, Teshawna Threat seconded, and the motion carried.]

GS-17, County and Municipal Governments, Law Enforcement, Fire and Emergency Services

One series description, retention, cutoff event change: 100714
One series description change: 100713
One series made defunct/superseded: 200144 superseded by Arrest Files –Adult– Pre 1974
One new series: Arrest Files Adult-Pre-1974.

Emily worked with a focus group on the updates.

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

GS-117, All State Agencies, Law Enforcement

Four series made defunct/not superseded.
One new series: Parking Tickets.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 117. Eric Harris so moved, Vince Brooks seconded, and the motion carried.]

GS-29, County and Municipal Governments, Criminal Justice Training Academy

One series retention change: 101460.

Emily worked with a panel on the updates to the schedule.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 29. Teshawna Threat so moved, Amanda Morrell seconded, and the motion carried.]

GS-103, All State Agencies, Personnel Records

One new series: Family and Medical Leave Act (FMLA) Records.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 103. Chad Owen so moved, Teshawna Threat seconded, and the motion carried.]

GS-108, All State Agencies, Fire, Safety and Security

One series title and description change: 012774.
One series made defunct/superseded: 012275, superseded by Emergency Response Plan.

[**Motion:** Greg Crawford called for a motion to approve General Schedule 108. Eric Harris so moved, Vince Brooks seconded, and the motion carried.]

New Virginia Birth Injury Fund Schedule

One new series: Participation Agreements.

[**Motion:** Greg Crawford called for a motion to approve the new Schedule. Vince Brooks recused himself from the vote on this schedule. Teshawna Threat so moved, Eric Harris seconded, and the motion carried.]

New Dept. of Emergency Management Schedule, Emergency Management General

Three new series: Emergency and Disaster Response Records: During Declared State of Emergency, Emergency Plan Reviews, Incident Response Records: Not Declared State of Emergency.

The committee discussed whether there is a final report item related to declared state of emergency. Emily will have a follow-up conversation with the agency about adding another series.

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

New Dept. of Emergency Management Schedule, Special Operations

Five new series: Hazardous Material Program Files, Hazmat Training Program: Certification and Recertification, Hazmat Training Program: Class Documentation, Radiological Preparedness Program: Annual Exercise, Radiological Preparedness Program: Annual Letter of Certification.

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

New Dept. of Emergency Management Schedule, Training, Exercise, and Education Division

Five new series: Commonwealth of Virginia Learning Center (COVLC) Course and Student Reports, Exercise Findings, Exercise Program Records, Instructor Records, Training Program Records.

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

New Business

Agency Specific Schedule Policy: Emily Johnson led this discussion. Records management implemented a new policy in April. Retention schedules expire after 25 years. Agencies are required to review retention schedules.

Cutoff Event Dates: Emily Johnson led this discussion. Analysts are updating misplaced cutoff events on general and agency-specific schedules in ShelfLife.

Department of Human Resource Management: Chad informed the committee about a request from the agency to change the retention period of personnel records.

Adjournment

Greg Crawford called for a motion to adjourn. Teshawna Threat so moved; Chad Owen seconded. The next meeting is scheduled for September 10, 2026.