

# **Schedule 36-1**

# **HISTORY NEBRASKA**

# **ADMINISTRATION DIVISION**

**July 17, 2018**

Nebraska Records Management Division  
3242 Salt Creek Circle  
Lincoln, NE 6850  
(402) 471-2559

**REQUEST FOR APPROVAL  
OF RECORDS RETENTION  
AND DISPOSITION SCHEDULE**

SCHEDULE	<b>36-1</b>
AGENCY, BOARD OR COMMISSION	<b>HISTORY NEBRASKA/ STATE HISTORICAL SOCIETY</b>
DIVISION, BUREAU OR OTHER UNIT	<b>ADMINISTRATION DIVISION</b>
Supersedes Schedule 36-7, Edition of January 16, 2014; Supersedes Edition of July 8, 2005	

**TO: STATE RECORDS ADMINISTRATOR  
STATE OF NEBRASKA**

**PART I – AGENCY STATEMENT:**

In accordance with Section 84-1212.01, R.R.S. 1943, approval of the attached records retention and disposition schedule by the State Records Administrator is hereby requested. Retention periods and dispositions have been recommended by this agency after a careful evaluation of all factors listed in Section 84-1212.01, R.R.S. 1943.

SIGNATURE

TITLE

DATE

*[Handwritten Signature]*  
Director = CEO

6/28/18

**PART II – APPROVAL OF STATE ARCHIVES:**

The attached schedule has been analyzed, all archival and historical material has been properly identified, no disposition except by transfer to the State Archives has been recommended for such material, and this schedule is approved as submitted.

SIGNATURE

DATE

*[Handwritten Signature]*

6/14/2018

**PART III – APPROVAL OF AUDITOR OF PUBLIC ACCOUNTS:**

The attached schedule has been reviewed, all audit material has been properly identified, and this schedule is approved as submitted.

SIGNATURE

DATE

*[Handwritten Signature]*

7/17/18

**PART IV – APPROVAL OF STATE RECORDS ADMINISTRATOR:**

The attached schedule has been reviewed in accordance with Section 84-1212.01, R.R.S. 1943, and is approved as submitted.

SIGNATURE

DATE

*[Handwritten Signature]*

7/17/18

## **INSTRUCTIONS FOR USING THIS SCHEDULE**

Records retention and disposition schedules are designed to serve as your records management guideline for storing and disposing of agency records, **regardless of the media on which they reside**, including paper, microfilm, diskettes, optical disks, CDs, DVDs, servers, computer hard drives, etc. This schedule was written specifically for records unique to your office and the State Agencies General Records Schedule #124 contains those records common to most state government agencies. This retention schedule, which is approved by the State Records Administrator, provides your only ongoing authority to dispose of records. Listed below are some basic procedures to follow when applying your schedule.

### **DISPOSING OF RECORDS**

1. Check your schedules to see what the retention period is. Note: Your agency's unique schedule will take precedence over State Agencies General Records Schedule #124 for any items which have differences in retention requirements.
2. Dispose of records that have met their retention periods. Unless there is pending or on going, legal action, records request, or audit.
3. For records requiring a review of, or transfer to the **NE State Historical Society (State Archives)**, your agency is required to contact the State Archives to negotiate the transfer. Additionally, **once the records are accessioned into their collection, they become the property of the State Archives** (Neb. Rev. Stat. §82-105). The State Archives may remove selected records in accordance with standard archival practices to ensure efficient access, organization and enduring historical value (Neb. Rev. Stat. §82-107). Please contact their office by calling (402) 471-4783.
4. Complete a Records Disposition Report for the records you dispose. The Records Disposition Report form is located on the Secretary of State Records Management website. [https://appengine.egov.com/apps/ne/sos\\_records\\_disposition\\_report](https://appengine.egov.com/apps/ne/sos_records_disposition_report). This report establishes that the destruction was performed in your normal course of business.

### **NON-SCHEDULED RECORDS**

Contact a Records Management Specialist in Records Management to see whether the records will fit under an item already on the schedule. If they do not, they must be retained until they are added to the next revision of your schedule.

### **SCHEDULE UPDATE**

It is the responsibility of each agency to periodically update their schedule. A Records Management Specialist in Records Management can assist you with the schedule update, which may involve adding new records series and making revisions to existing items. Keeping your schedule current will ensure you have the ongoing authority to discard records when their useful life has ended.

### **QUESTIONS**

If you have any questions about these procedures, please contact your agency Records Officer or the Records Management Specialist in Records Management. They will help you with any questions the schedule may present, including: transferring records to the State Records Center or microfilming records, scanning records, etc.

**Records Management Division  
3242 Salt Creek Circle  
Lincoln, NE 68504  
402-471-2559**

**SCHEDULE 36-1**  
**HISTORY NEBRASKA/NEBRASKA STATE HISTORICAL SOCIETY**  
**ADMINISTRATION DIVISION**  
**July 17, 2018**

Retention requirements are for all records, regardless of the media on which they reside, unless otherwise noted.

Supersedes Edition of July 8, 2005; Supersedes Schedule 36-7 Edition of January 16, 2014

ITEM NUMBER	RECORD TITLE	DESCRIPTION/EXAMPLES	RETENTION	REFERENCE/COMMENTS
36-1-1	<b>SPECIAL SUBJECT FILES OF THE SOCIETY DIRECTOR</b>	May include a variety of materials including such topics as historical marker files; centennial or special organization data; county historical society data. Some files relate to Society activities supported with private funds.	<b>Permanent:</b> Transfer to the State Archives when no longer of reference value	Contact State Archives to negotiate transfer
36-1-2	<b>PROJECT FILES, LB309</b>	Records relating to construction/rehabilitation of Society facilities funded by LB309 monies.	<b>Permanent:</b> Transfer to State Archives when no longer of reference value	Contact State Archives to negotiate transfer
36-1-3	<b>MEMBERSHIP FILES</b>	Documents paid membership to the Nebraska State Historical Society.	<b>2 years</b>	
36-1-4	<b>SECURITY AND ACCESS SURVEILLANCE</b>	Security access and surveillance records. May include, but are not limited to: Alarm printouts, surveillance videos, digital or audio recordings from various buildings or systems, and access cards, logs, or system records.	<b>IF CASE IS INITIATED:</b> Copy to another medium; after no unfinished matter pending in the case <b>ALL OTHERS:</b> 1 year	
36-1-5	<b>VOLUNTEERS: ACTIVITY DESCRIPTION &amp; JOB AVAILABILTY</b>	May include, but not limited to, information on job possibilities available to volunteers and requirements needed for such jobs.	<b>2 years after date of personnel action</b>	
36-1-6	<b>VOLUNTEERS: AGENCY INFORMATION</b>	Volunteer information from various agencies', organizations, and institutions. May include, but not limited to, promotional materials in packets and parking availability.	<b>2 years</b>	
36-1-7	<b>VOLUNTEERS: NEWSLETTERS</b>	Monthly newsletter for volunteers.	<b>Obsolete as of 2008</b>	Newsletters were already transferred to State Archives
36-1-8	<b>VOLUNTEER HISTORY: INDIVIDUAL FILE</b>	May include volunteer application forms, resume, volunteer timesheets, photograph of volunteer, or notification of departure from volunteering.	<b>2 years</b>	
36-1-9	<b>VOLUNTEERS: RECOGNITION EVENTS</b>	Annual volunteer recognition event records.	<b>5 years</b>	
36-1-10	<b>DAILY SALES REPORT</b>	Report sent to administration office of daily sales by all facilities.	<b>See Schedule 124</b>	See ACCOUNTS RECEIVABLE, ITEM 124-3
36-1-11	<b>SOCIETY PUBLICATION ORDERS</b>	Orders for publications of the society. Sales are on a cash basis only.	<b>See Schedule 124</b>	See ACCOUNTS RECEIVABLE, ITEM 124-3

ITEM NUMBER	RECORD TITLE	DESCRIPTION/EXAMPLES	RETENTION	REFERENCE/COMMENTS
36-1-12	CASH RECEIPTS JOURNAL	Journal written in produced by computer or Excel, summarizes daily cash receipts. It is also referred to as a Receipts and Disbursements Journal. It is an internal document that contains the same information recorded on the official receipts.	See Schedule 124	See ACCOUNTS RECEIVABLE, ITEM 124-3
36-1-13	CASH RECEIPTS	Receipts created at the reference desks, which are transcribed into the cash receipt sales log. May include state receipts and museum admission receipts.	See Schedule 124	See ACCOUNTS RECEIVABLE, ITEM 124-3
36-1-14	CASH RECEIPTS BOOK	Original receipts for money received through the mail or at the reference desks for research services or photocopies.	See Schedule 124	See ACCOUNTS RECEIVABLE, ITEM 124-3
36-1-15	BI-WEEKLY CALCULATE	Bi-weekly report of calculations.	See Schedule 124	See PAYROLL -AGENCY RECORDS, ITEM 124-86
36-1-16	SOCIETY VOUCHERS	Consists of invoices and receipts from private companies for services or products purchased and carbon copies of checks issues by the society as payment.	See Schedule 124	See ACCOUNTS PAYABLE, ITEM 124-1
36-1-2	PRIVATE FUNDS			OBSOLETE
36-1-18	WORK-STUDY TIME SHEETS			OBSOLETE
36-7-3	INFORMATION PACKETS			OBSOLETE
36-7-5	TELEPHONE RECORDS			OBSOLETE