RECORDS COORDINATOR ALL-HANDS
SEPTEMBER 12, 2024

NORTH Dakota | Information Technology
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Agenda

- Guest Speaker: "Cheerios: Records Management in a Box"
- News from Records Management
- Questions

Guest Speaker

Bill Roach

Bill Roach, MSL, CRM, is a Senior IG Analyst for Xcel Energy in Minneapolis, MN. He is responsible for the company's Records Retention Schedule and is working to modernize Xcel's approach to IG and RIM. Bill has more than forty years of experience in Records Management, eDiscovery, Litigation Support, and Enterprise Content Management related technologies. He has worked for organizations in the construction, defense, financial services, government, mining, petrochemical, and utility industries.

News from Records Management

- Recent Updates to RMS
- Upcoming Changes to Accounting Records on NDGRS
- Join the ND Chapter of [ARMA International](#)

- Next meeting: December 2024 (tentative)

Recent Updates to RMS

<u>Recent updates:</u>

1. Made reports (records disposals, archives and users) available to those with Records Coordinator role.

2. Removed "estimated volume", "annual accumulation" and "original record series" fields from records series request and record series and changed label from "Description" to "Record Series Description".

3. Changed the month many agencies start their disposal reporting process (i.e. start July, due December 31). If your agency was affected, you should have received communications from us.

4. Changed the Record Series report (for disposal process and record series searches when you click "Export Table Data"):

   - Added the "Retention Comments"
   - Removed "Active" column. You can still search for/display "Inactive Records", but this information will no longer be exported.
   - Changed the formatting to make column widths smaller on export.
   - Changed header from "To Dispose" to "Eligible Disposal Date"
   - Changed "Control Number" to "RCN" (record control number)

The next updates we are working on are improvements to the disposal reporting process. Watch for details to come!

ND GRS Changes

**ONLY APPLIES TO THOSE REQUIRED TO UTILIZE THE NDGRS (EXCLUDES UNIVERSITY SYSTEM USERS)

WHAT: Records Management is making a change to the ND General Retention Schedule regarding accounting-related record series.

We will be combining the following record series to simplify the management of these records:

010601 Bank Statements
011301 Ledgers/Journals
011501 Purchase Order/Requisitions
011502 Accounts Payable
011505 Purchase Card Records
011801 Receipt Books/Remittance Lists
011802 Accounts Receivable
012101 IDBs (Interdepartmental Billings)

The retention on all of these is **3ACFY** (After Current Fiscal Year + 3 years) which will remain unchanged. Confidentiality requirements will also remain intact.

Once the change is made, the above will be deleted, and a new record series will be created to replace them:

Title: STATE ACCOUNTING RECORDS
RCN: To be determined
Description: *This series includes bank statements, deposit records, accounts payable/receivable records (including but not limited to: payment vouchers, travel expenses, abstracts for payment, claims, vendor invoices, receipt/payment of cash, etc. for the disbursement or collection of revenue funds), reports to the State Treasurer's office (journal vouchers, general ledger documentation), purchase orders, purchase card documentation, interdepartmental billings (IDBs) for the transfer of funds between state agencies, and all supporting documentation. Note: financial information collected in Peoplesoft will be purged by OMB.*

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