



## Agenda

### Archives and Records Commission

April 25, 2024 | 11:00 a.m.

Oklahoma Department of Libraries

200 NE 18 Street

Oklahoma City, OK 73105

All participating members of the Commission will be in person at the above meeting location. The meeting is open to the public. This meeting is being conducted under the provisions of the Open Meeting Act as provided in Title 25, Oklahoma Statutes §§ 301-314.

#### 1. Call to Order and Roll Call

Audrey Rockwell, Chair

Natalie Currie, Vice Chair and Secretary

Mariah Carter, Proxy for Lieutenant Governor

Ruthie Chicoine, Proxy for State Auditor and Inspector

Kiran Nallayahgari, Proxy for State Treasurer

#### 2. Consideration and possible approval of minutes for the January 25, 2024 meeting

#### 3. State Archives and Records Management Division Activity Report

#### 4. Consideration and possible approval of Records Retention Schedules and Records Disposition Authorizations

a. 2002-07 [AMD] Department of Aerospace and Aeronautics

b. 2024-01 [AMD] Oklahoma Tax Commission

c. 2024-02 [NEW] Oklahoma Medical Marijuana Authority

#### 5. Adjournment

Key to abbreviations used above:

[AMD] = Amendment to a Records Disposition Schedule

[NEW] = Records Disposition Schedule

[RDA] = Records Disposition Authorization

Upcoming Archives and Records Commission meetings:

July 25, 2024

October 24, 2024



Archives and Records Commission  
Meeting Minutes, January 25, 2024

Call to Order:

Audrey Rockwell called the meeting to order at 11:02 a.m.

Members present:

Audrey Rockwell	Chair
Natalie Currie	Vice Chair and Secretary
Kirby Smith	Proxy for Lt. Governor
Kiran Nallayahgari	Proxy for State Treasurer

Members absent:

Ruthie Chicoine	Proxy for State Auditor
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Also present:

Madalynn Martin	Office of the Attorney General
Alyssa Vaughn	Department of Libraries
Amanda Chrestensen	Department of Libraries
Cassandra Spindle	Department of Libraries
Joshua Smith	Board of Tests for Alcohol and Drug Influence
Mary Gail Foster	Department of Human Services
Sherri Williams	Department of Human Services

Posting of Meeting Agenda

The agenda was posted on the front window of the Oklahoma Department of Libraries building on January 11, 2024. The agenda was also posted on the agency's website on January 11, 2024.

Approval of Minutes of the Meeting of October 26, 2023:

Approval of the Minutes was moved by Smith and seconded by Currie.

Currie	aye
Nallayahgari	aye
Rockwell	abstain
Smith	aye

Consideration of Requests:

**4a. Amendment to Records Disposition Schedule 1983-09, Oklahoma Tax Commission, Ad Valorem**

The Oklahoma Tax Commission requested Records Disposition Schedule 1983-09 be amended. Approval of the amendments to Records Disposition Schedule 1983-09 was moved by Smith and seconded by Nallayahgari.

Currie	aye
Nallayahgari	aye
Rockwell	aye
Smith	aye

**4b. Amendment to Records Disposition Schedule 1984-11, Oklahoma Tax Commission, Income Tax**

The Oklahoma Tax Commission requested Records Disposition Schedule 1984-11 be amended. Approval of the amendments to Records Disposition Schedule 1984-11 was moved by Smith and seconded by Currie.

Currie	aye
Nallayahgari	aye
Rockwell	aye
Smith	aye

**4c. Amendment to Records Disposition Schedule 2023-01, Oklahoma Tax Commission, Legal**

The Oklahoma Tax Commission requested Records Disposition Schedule 2023-01 be amended. Approval of the amendments to Records Disposition Schedule 2023-01 was moved by Smith and seconded by Currie.

Currie	aye
Nallayahgari	aye
Rockwell	aye
Smith	aye

**4d. New Records Disposition Schedule 2024-01, Oklahoma Tax Commission**

The Oklahoma Tax Commission requested new Records Disposition Schedule 2024-01 be created. At Currie's request and with the approval of the Tax Commission, a sentence was added to the Legal Requirements section in the Introduction clarifying which records require authorization to be destroyed. Approval of the creation of Records Disposition Schedule 2024-01, as amended, was moved by Smith and seconded by Nallayahgari.

Currie            aye  
Nallayahgari    aye  
Rockwell         aye  
Smith             aye

**4e. Amendment to Records Disposition Schedule 1988-01, Oklahoma Department of Mental Health and Substance Abuse Services, Griffin Memorial Hospital**

The Oklahoma Department of Mental Health and Substance Abuse Services requested Records Disposition Schedule 1988-01 be amended. Approval of the amendments to Records Disposition Schedule 1988-01 was moved by Currie and seconded by Smith.

Currie            aye  
Nallayahgari    aye  
Rockwell         aye  
Smith             aye

**4f. Amendment to Records Disposition Schedule 1990-02, Oklahoma State Department of Health, Prevention and Preparedness Services**

The Oklahoma State Department of Health requested Records Disposition Schedule 1990-02 be amended. Approval of the amendments to Records Disposition Schedule 1990-02 was moved by Currie and seconded by Smith.

Currie            aye  
Nallayahgari    aye  
Rockwell         aye  
Smith             aye

**4g. Amendment to Records Disposition Schedule 2002-02, Oklahoma State Department of Health, Family Health**

The Oklahoma State Department of Health requested Records Disposition Schedule 2002-02 be amended. Approval of the amendments to Records Disposition Schedule 2002-02 was moved by Nallayahgari and seconded by Smith.

Currie            aye  
Nallayahgari    aye  
Rockwell         aye  
Smith             aye

**4h. Amendment to Records Disposition Schedule 2003-05, Oklahoma State Department of Health, County Health Departments**

The Oklahoma State Department of Health requested Records Disposition Schedule 2003-05 be amended. Approval of the amendments to Records Disposition Schedule 2003-05 was moved by Nallayahgari and seconded by Smith.

Currie	aye
Nallayahgari	aye
Rockwell	aye
Smith	aye

**4i. Amendment to Records Disposition Schedule 2021-01, Board of Tests for Alcohol and Drug Influence**

The Oklahoma Board of Tests for Alcohol and Drug Influence requested Records Disposition Schedule 2021-01 be amended. Approval of the amendments to Records Disposition Schedule 2021-01 was moved by Smith and seconded by Currie.

Currie	aye
Nallayahgari	aye
Rockwell	aye
Smith	aye

**4j. Amendment to Records Disposition Schedule 2006-03, Oklahoma Department of Human Services, Legal Services**

The Oklahoma Department of Human Services requested Records Disposition Schedule 2006-03 be amended. Approval of the amendments to Records Disposition Schedule 2006-03 was moved by Smith and seconded by Nallayahgari.

Currie	aye
Nallayahgari	aye
Rockwell	aye
Smith	aye

**4k. Amendment to Records Disposition Schedule 2014-02, Oklahoma Department of Human Services, Financial Services**

The Oklahoma Department of Human Services requested Records Disposition Schedule 2014-02 be amended. Approval of the amendments to Records Disposition Schedule 2014-02 was moved by Smith and seconded by Currie.

Currie	aye
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Nallayahgari aye  
Rockwell aye  
Smith aye

**4l. Amendment to Records Disposition Schedule 1982-19, Oklahoma Department of Libraries**

The Oklahoma Department of Libraries requested Records Disposition Schedule 1982-19 be amended. Approval of the amendments to Records Disposition Schedule 1982-19 was moved by Nallayahgari and seconded by Smith.

Currie abstain  
Nallayahgari aye  
Rockwell aye  
Smith aye

**4m. Records Disposition Authorization 2024-01, Oklahoma Department of Libraries, Oklahoma Mental Health and Substance Abuse Services**

The Oklahoma Department of Libraries requested Records Disposition Authorization 2024-01 be approved. Approval of Records Disposition Authorization 2024-01 was moved by Smith and seconded by Nallayahgari.

Currie abstain  
Nallayahgari aye  
Rockwell aye  
Smith aye

**New Business:**

No new business was conducted at this time.

**Adjournment:**

The meeting was adjourned at 11:15 a.m.

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Natalie Currie, Vice Chair and Secretary  
Oklahoma Department of Libraries

## Archives and Records Management Department Activity Report January 11 – April 12, 2024

### Staffing changes

- Patricia Nunes started as the Archives and Records Management director, January 29

### State Archives

- Processed 127 cubic feet of records from the Election Board, Tourism Department, Employment Security Commission, and Department of Charities and Corrections.
- Uploaded 29 items to the Archives.OK.Gov collection on Digital Prairie, including eight promotional pamphlets by the Semi-Centennial Commission, six Central State Hospital publications, and 14 Oklahoma State Penitentiary reports.
- Interesting research requests include the history of the first WIC clinic in Oklahoma, aerial photographs of a family farm showing where a coal mine used to be, and licensing files for a married couple who both became registered pharmacists in 1921.

### Records Management

#### *Training*

- Provided records management training and a State Archives tour to two staff members from the Governor's Office, January 17 and April 2
- Provided records management training to five staff members from the Department of Veterans Affairs, February 14
- Provided records management training to three staff members from the Department of Agriculture, February 15
- Provided records management training at the Municipal Clerks and Treasurers Institute, March 4
- Presented "Records Retention and Destruction" at the Finance Coordinator/Key Personnel Conference for the District Attorneys Council, April 11

#### *State Records Center and Annex*

- Transfers to the State Records Center include 230 cubic feet from the following agencies: Aeronautics Commission, Department of Education, Employment Security Commission, House of Representatives, Board of Nursing, and Secretary of State.
- Staff pulled 105 cubic feet of records for destruction for the Corporation Commission, Ethics Commission, Mental Health and Substance Abuse Services, and OMES.

### Outreach

- Provided a State Archives tour to a master's student from Georgia researching archives operations and best practices, January 25
- Provided a State Archives tour to Representative John Waldron and conducted a special research request for five topics from nine collections, February 26
- Presented "Family History in the Oklahoma State Archives" for the Allen County Public Library Genealogy Center, February 27
- Provided a State Archives tour to Senator Jessica Garvin and her family, March 22

ARCHIVES AND RECORDS COMMISSION

~~OKLAHOMA AERONAUTICS COMMISSION~~  
DEPARTMENT OF AEROSPACE AND AERONAUTICS  
Amendments to Records Disposition Schedule **2002-07**

**\* April 25, 2024 \***

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Summary

- 1-6 Agency requests series be added to its schedule.
- 1-7 Agency requests series be added to its schedule.



~~OKLAHOMA AERONAUTICS COMMISSION~~  
**DEPARTMENT OF AEROSPACE AND AERONAUTICS**  
Amendments to Records Disposition Schedule **2002-07**

\* April 25, 2024 \*

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1-6      **Aircraft Pilot and Passenger Protection Act (APPPA) Permit Applications**

Description:      File contains applications for permits to build structures near public-use airports and military installations in the State. Records may also include permit confirmations and related correspondence.

Disposition:      Retain permanently.  
Add to schedule, April 25, 2024

1-7      **Height and Zoning Deeds**

Description:      File contains height and zoning deeds submitted by airports to receive airport construction grants that involve state and federal funds.

Disposition:      Retain permanently.  
Add to schedule, April 25, 2024

**OKLAHOMA TAX COMMISSION**  
Amendments to Records Disposition Schedule **2024-01**

**\* April 25, 2024 \***

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Summary

Series 3 – Audit Services

- 3-1 Agency requests series be added to its schedule.
- 3-2 Agency requests series be added to its schedule.
- 3-3 Agency requests series be added to its schedule.
- 3-4 Agency requests series be added to its schedule.
- 3-5 Agency requests series be added to its schedule.
- 3-6 Agency requests series be added to its schedule.
- 3-7 Agency requests series be added to its schedule.
- 3-8 Agency requests series be added to its schedule.

Series 14 – Internal Affairs

- 14-1 Agency requests series be added to its schedule.
- 14-2 Agency requests series be added to its schedule.
- 14-3 Agency requests series be added to its schedule.
- 14-4 Agency requests series be added to its schedule.
- 14-5 Agency requests series be added to its schedule.
- 14-6 Agency requests series be added to its schedule.
- 14-7 Agency requests series be added to its schedule.
- 14-8 Agency requests series be added to its schedule.
- 14-9 Agency requests series be added to its schedule.

Series 16 – Legal

- 16-16 Agency requests series be added to its schedule.

ARCHIVES AND RECORDS COMMISSION

**OKLAHOMA TAX COMMISSION**

Amendments to Records Disposition Schedule **2024-01**

**\* April 25, 2024 \***

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Audit Services

**3-1 Audit File Confidential Record (68 O.S. §205)**

Description: File consists of tax returns for periods influencing the Field Audit, including all attachments, documents submitted by and on behalf of the Taxpayer regarding the audit period, work papers including Excel workbooks and Excel import, Officer List, Email Authorization, records requests, Servicing Agent Authorization, Section Four (4) Comparison Template, Audit Packet, Audit Review Form, Taxpayer Records, Federal Taxpayer Information (FTI) Log, Power of Attorney Form BT-129 and correspondence exchanged between the Oklahoma Tax Commission and Taxpayer.

Disposition: Retain twenty (20) years, then destroy, provided no legal actions are pending and the audit has been fully paid. If legal action is pending, destroy two (2) years after exhaustion of all legal remedies, provided records meet all stipulated retention requirements. If the audit has not been fully paid, destroy two (2) years after the audit is fully paid, provided records meet all stipulated retention requirements.  
Add to schedule, April 25, 2024

**3-2 Credit Acknowledgment Letters Confidential Record (68 O.S. §205)**

Description: Letters sent to the Taxpayer stating the status of a credit, the amount, if any, and the reason for denial, if any.

Disposition: Retain twenty (20) years, then destroy.  
Add to schedule, April 25, 2024

**3-3 Correspondence**

Description: Reference file of correspondence. Information includes letters, legislative bills, responses, reports, and other related documents excluding letters included in series 3-1, series 3-2 and series 3-7.

Disposition: Retain (5) years, then destroy.  
Add to schedule, April 25, 2024

**3-4 Reports**

Description: File includes record copy of reports submitted by Division employees to other employees of the Oklahoma Tax Commission relating to audits.

Disposition: Retain (5) years, then destroy.  
Add to schedule, April 25, 2024

**OKLAHOMA TAX COMMISSION**  
Amendments to Records Disposition Schedule **2024-01**

**\* April 25, 2024 \***

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Audit Services

**3-5     Training Materials**

Description:     Manuals, checklists, and guidelines available to employees of the Audit Services Division for training of various duties within the Audit Services Division.

Disposition:     Retain five (5) years after no longer used, then destroy.  
Add to schedule, April 25, 2024

**3-6     Internal Forms**

Description:     Forms created and used internally by employees of Audit Services, such as tax policy approval forms for trust tax assessments, audit review forms, travel claim forms, leave slip forms, information technology (IT) equipment request forms, IT access request forms, job posting request forms, and Americans with Disabilities Act accommodation forms.

Disposition:     Retain two (2) years after no longer used, then destroy.  
Add to schedule, April 25, 2024

**3-7     Voluntary Disclosure Agreement (VDA)**

Description:     File includes applications submitted for Voluntary Disclosure Agreements (VDA), executed VDAs, paperwork submitted for the VDA period, and related work papers and correspondence.

Disposition:     Retain twenty (20) years, then destroy, if no liability is owed. If liability is owed, destroy two (2) years after the liability is fully paid, provided records meet all stipulated retention requirements.  
Add to schedule, April 25, 2024

**3-8     Presentation Materials**

Description:     Materials used for presentations made by the Audit Services Continuing Professional Education (CPE) Committee or employees of the Audit Services Division, including multi-media materials and handouts.

Disposition:     Retain six (6) years, then destroy.  
Add to schedule, April 25, 2024

**OKLAHOMA TAX COMMISSION**  
Amendments to Records Disposition Schedule **2024-01**

**\* April 25, 2024 \***

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Internal Affairs

**14-1 Correspondence**

Description: Files consist of correspondence, memos, and related documents of Internal Affairs employees.

Disposition: Retain three (3) years after making of the record or the personnel action involved, whichever occurred later, then destroy, provided no legal actions involving personnel action are pending. If legal action is pending, destroy two (2) years after exhaustion of all legal remedies.  
Add to schedule, April 25, 2024

**14-2 Training Materials**

Description: Guidelines and multi-media presentations available to employees of the Oklahoma Tax Commission.

Disposition: Retain two (2) years after no longer used, then destroy.  
Add to schedule, April 25, 2024

**14-3 Reports Confidential Record (68 O.S. § 205)**

Description: File includes copies of reports prepared for or by employees of the Division of the Oklahoma Tax Commission, including incident reports and badge reports not included in series 14-7.

Disposition: Retain five (5) years after making of the record or the personnel action involved, whichever occurred later, then destroy, provided no legal actions involving hiring or promotion are pending. If legal action is pending, destroy two (2) years after exhaustion of all legal remedies.  
Add to schedule, April 25, 2024

**14-4 Background Files (Essential Record 67 O.S. §203 (e)) (Confidential Record 51 O.S. § 24.A7)**

Description: File includes background investigation information related to new hires.

Disposition: Refer to the General Record Disposition Schedule, Series 3-90.  
Add to schedule, April 25, 2024

**OKLAHOMA TAX COMMISSION**  
Amendments to Records Disposition Schedule **2024-01**

**\* April 25, 2024 \***

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Internal Affairs

**14-5 Internal Investigations** (Essential Record 67 O.S. §203 (e)) (Confidential Record 51 O.S. § 24.A7)

Description: File includes investigation information related to new hires, including non-criminal, criminal, and miscellaneous investigations. File may also include internal investigations, investigation referral, and abandoned investigations. Files include supporting documentation related to the issue of the investigation.

Disposition: Retain in office five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two years after exhaustion of all legal remedies, provided records meet all stipulated retention requirements.  
Add to schedule, April 25, 2024

**14-6 Closed Circuit Television Footage**

Description: Security footage from Closed Circuit Television.

Disposition: Retain sixty (60) days, then destroy, if no legal actions are pending. If legal action is pending, destroy two years after exhaustion of all legal remedies, provided records meet all stipulated retention requirements.  
Add to schedule, April 25, 2024

**14-7 Publication 1075 Required Information**

Description: Information and reports relating to internal security that are required to be kept pursuant to Internal Revenue Service (IRS) Publication 1075 and are for the purpose of protecting federal tax information (FTI), including security sign-in sheets, badge usage reports, lists of employees with access to FTI, lists of employees with keys to access FTI, as well as any other information required to be maintained.

Disposition: Retain five (5) years after the last IRS internal inspection regarding the documents, then destroy.  
Add to schedule, April 25, 2024

**OKLAHOMA TAX COMMISSION**

Amendments to Records Disposition Schedule **2024-01**

**\* April 25, 2024 \***

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Internal Affairs

**14-8 Parking Information**

Description: Information regarding the car types and license plates of employees of the Oklahoma Tax Commission that are authorized to park in a particular parking garage.

Disposition: Retain three (3) years after the employee is no longer employed by the Oklahoma Tax Commission, then destroy.  
Add to schedule, April 25, 2024

**14-9 Emergency Management Actions**

Description: Information and records concerning large-scale events affecting the Oklahoma Tax Commission, including security assessments, use of the emergency alert systems used by employees, and use of the emergency action plan.

Disposition: Retain three (3) years after the event, then destroy, if no legal actions are pending. If legal action is pending, destroy two years after exhaustion of all legal remedies, provided records meet all stipulated retention requirements.  
Add to schedule, April 25, 2024

ARCHIVES AND RECORDS COMMISSION

**OKLAHOMA TAX COMMISSION**

Amendments to Records Disposition Schedule **2024-01**

**\* April 25, 2024 \***

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Legal

**16-16 Bankruptcy Correspondence** (Confidential Record 68 O.S. § 205)

Description: Files consist of bankruptcy pleadings and routine OTC responses which are non-litigation in nature and do not affect the amount of a claim as filed.

Disposition: Retain in office until no longer required for administrative purposes, then destroy.  
Add to schedule, April 25, 2024



ARCHIVES AND RECORDS COMMISSION

**OKLAHOMA MEDICAL MARIJUANA AUTHORITY**  
NEW Records Disposition Schedule 2024-02

**\* April 25, 2024 \***

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This records disposition schedule encompasses the original schedule approved by the Archives and Records Commission on April 25, 2024.

Convenience or Reference Copies

Copies of records created for the user's convenience may be destroyed when they are no longer required for administrative purposes. Access restrictions, if any, apply to copies and originals alike. It is not necessary to request approval for destruction of convenience copies of records.

Confidential Records

This schedule may include a number of confidential records. Confidential records include those subject to the protection or exclusions of 63 O.S. §§ 427.7, 427.13, and/or 427.22. Records identified herein may be subject to any other confidentiality or privilege available at law. Confidential or otherwise protected records included in this schedule reflect a desire to schedule confidential records in the same manner as other records and no confidentiality, privilege or protection is waived.

Record Format

Individual agencies, boards, commissions, and institutions shall maintain individual record series in the most efficient and cost-effective format consistent with sound records management principles, state and federal laws, rules and regulations, court decisions, and their individual records keeping needs.

If statutory provisions, court decisions, Code of Federal Regulations (CFR), Oklahoma Rules and Regulations adopted in accordance with the Administrative Procedures Act (75 O.S. §250 *et seq.*), or other state and federal regulations mandate retention periods longer than those stipulated in this Schedule or require that records be retained in hard copy or other format, the applicable statutes, court decisions, CFR, or other state and federal regulations shall govern the retention periods and formats of the records.

In order to maintain individual record series in the most efficient and cost-effective format, the Oklahoma Medical Marijuana Authority maintains most agency records in electronic format. Records not initially created in electronic format may be converted to that format by creating a digital image of the original record or by entering data from the original record. After this process is complete and verified, the original record will be destroyed. Electronic backup copies of records are stored in an off-site storage area operated and managed by the Office of Management and Enterprise Services.

Information regarding requirements for specific record formats is located in the Introduction to the General Records Disposition Schedule for State Agencies, Boards and Commissions, which can be found at the Oklahoma Department of Libraries website.

**OKLAHOMA MEDICAL MARIJUANA AUTHORITY**  
NEW Records Disposition Schedule **2024-02**

**\* April 25, 2024 \***

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1-1 **Digital Newsletters**

Description: Files include newsletters distributed to commercial licensees, medical marijuana patients, the Oklahoma Legislature, government officials or OMMA staff and any distribution list utilized in the distribution of such newsletters.

Disposition: Retain five (5) years after distribution of the newsletter, then destroy, provided no legal action is pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-2 **Compliance Program Files**

Description: Files include documents collected during regulatory compliance duties, including licensee compliance field visits, inspections, and/or investigations, observations of potential regulatory non-compliance and policies related thereto, compliance monitoring, licensee inventory tracking data and records, internal assignment records, and policies related thereto.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-3 **Legislative Tracking Records**

Description: Files include records of proposed and engrossed legislation, drafts and amendments thereto, and notes related to the effect upon the Agency.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-4 **Science Division Program Files**

Description: Files include documents collected during regulatory compliance duties, inspections and/or investigations, including records of observations and potential regulatory non-compliances, licensee data records, Certificates of Analysis, data records, waste records, education records, licensee operations policies, transfer manifests, employee records, training records, transaction records, and chain of custody records.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

**OKLAHOMA MEDICAL MARIJUANA AUTHORITY**  
NEW Records Disposition Schedule **2024-02**

**\* April 25, 2024 \***

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1-5 **Commercial Licensing Program Files**

Description: Files include licensing documents related to commercial licensees and the documents provided thereto, including applications, surrenders, mailing records, status review notices, database achieves, and data records.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-6 **Patient and Caregiver Licensing Program Files**

Description: Files include licensing documents related to patient and caregiver licenses and documents provided thereto, including applications, surrenders, mailing records, status review notices, database achieves, and data records.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-7 **Investigative Files**

Description: Files include investigative records, including criminal history reports, surveillance records, covert recordings, operations plans, investigative reports, investigative photographs, and investigative recordings.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-8 **Training Records**

Description: Files include any records of internal Agency training, including training presentations, learning records, training evaluations, attendance records and training materials.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

**OKLAHOMA MEDICAL MARIJUANA AUTHORITY**  
NEW Records Disposition Schedule 2024-02

**\* April 25, 2024 \***

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1-9 **Call Center Recordings**

Description: Files consist of audio and/or video recordings of calls received by the Agency Call Center.

Disposition: Retain six (6) months, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-10 **Call Center Program Files**

Description: Files include licensing documents related to Agency call center services, including job aides, training records, and program files.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-11 **Recordings from Mobile Devices – Incident Not Identified**

Description: Files include recordings created with mobile devices in which the recording is not known to have captured a unique or unusual incident or action from which litigation or criminal prosecution is expected or likely to result. This series includes all mobile recordings, regardless of where the recording device is mounted, such as body camera (device worn by officer) or dash camera (device mounted on a vehicle), or State-issued mobile device.

Disposition: Retain until no longer than required for administrative purposes, then destroy.

1-12 **Recordings from Mobile Devices – Incident Identified**

Description: Files include recordings created with mobile devices in which the recording is known to have captured an incident from which administrative action, litigation, or criminal prosecution is expected or likely to result. Examples might include compliance inspections resulting in a regulatory emergency, an officer involved shooting, use of lethal force, incidents resulting in medical treatment, or incidents identified for preservation by the regulatory, civil, or criminal prosecutor. This series includes all mobile recordings, regardless of where the recording device is mounted, such as body camera (device worn by officer) or dash camera (device mounted on a vehicle), or State-issued mobile device.

Disposition: Retain two (2) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

**OKLAHOMA MEDICAL MARIJUANA AUTHORITY**  
NEW Records Disposition Schedule **2024-02**

**\* April 25, 2024 \***

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1-13 **Project Management Program Files**

Description: Files include project logs, project charters, meeting agendas, meeting minutes, and project notes.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-14 **Litigation Files**

Description: Files consist of any documents pertaining to routine civil, administrative, or criminal litigation involving the Oklahoma Medical Marijuana Authority where the Agency determines neither legal precedent is set, nor historical value exists.

Disposition: Retain two (2) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.

1-15 **Legal Program Files**

Description: Files consist of any non-confidential and non-privileged communications, reports, and documents not covered elsewhere in this schedule, pertaining to the management and program activities of the Legal Department, and not involving a specific litigation file.

Disposition: Retain five (5) years, then destroy, provided no legal actions are pending. If legal action is pending, destroy two (2) years after resolution of all legal claims.