

Submitted by: Chairman of the Assembly
at the Request of the Mayor

Prepared by: Information Technology

For reading: March 16, 2004

CLERK'S OFFICE

APPROVED

Date: 3-16-04

ANCHORAGE, ALASKA

AR NO. 2004-62

**A RESOLUTION OF THE ANCHORAGE MUNICIPAL ASSEMBLY APPROVING
THE REQUEST TO CREATE THE RECORDS RETENTION SCHEDULE FOR THE
REAL ESTATE SERVICES DEPARTMENT, IN ACCORDANCE WITH MUNICIPAL
POLICY AND PROCEDURE 52.2.**

THE ANCHORAGE MUNICIPAL ASSEMBLY RESOLVES:

Section 1. That the Real Estate Services Department will create a Records Retention Schedule, with item #'s 1, 2, 3, 4, 5, and 10, to accommodate the storage of the following Records Series Titles

1. TAX SALES OF FORECLOSED PROPERTY
2. MUNICIPAL PROPERTY SALES
3. MUNICIPAL PROPERTY PURCHASES
4. MUNICIPAL PROPERTY LEASES
5. PRIVATE SECTOR LEASED PROPERTY
10. REAL ESTATE SERVICES CORRESPONDENCE

Section 2. That the Real Estate Services records which were formerly included under Finance/Treasury/Tax Section's Retention Schedule (items numbers 4, 9, and 11), are now listed on Real Estate Services draft Records Retention Schedule as Item Numbers 6, 7, 8, and 9. Items to be removed from the Finance/treasury/ Taxes Records Retention Schedule are:

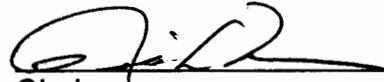
4. LITIGATION REPORTS AND DOCUMENTATION
9. TAX FORECLOSURE RECORDS, JUDGMENT OF DECREE, CLERK'S DEED, PUBLICATIONS, COST WORKSHEETS, REDEMPTION CERTIFICATES, VOUCHER REQUESTS.
11. CERTIFIED MAIL RETURN RECEIPTS, FORCLOSURE AND DEED, CERTIFIED POSTAGE LIST.

Items included in the Real Estate Services Record Retention in place of Finance/Treasure/Taxes Items Numbered 4, 9, and 11 are:

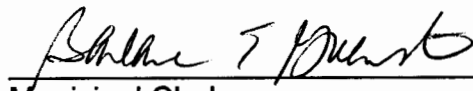
6. FORECLOSURE/DEED
7. REPURCHASED/SOLD DEEDED PARCEL FILES
8. TAX DEEDED PROPERTY SALES ACCOUNTING FILES
9. CERTIFICATES OF REDEMPTION

PASSED AND APPROVED by the Anchorage Assembly this 16th day of

March, 2004.


Chair

ATTEST:


Municipal Clerk



MUNICIPALITY OF ANCHORAGE

ASSEMBLY MEMORANDUM

No. AM 253-2004

Meeting Date: March 16, 2004

FROM: Mayor

SUBJECT: Assembly Resolution Accepting a Request to Create the Records Retention Schedule for the Real Estate Services Department, in Accordance with Municipal Policy and Procedure 52-2

The Real Estate Services Department has created a separate Records Retention Schedule, due to the reorganization of their department which as resulted in records which were under the control of the Finance department, Treasury/Taxes division, now being administered by the Heritage Land Bank, Real Estate Services division as of January 2001.

Real Estate Services is creating a new Records Retention Schedule and adding item numbers 1, 2, 3, 4, 5, and 10 which are being established to accommodate storage of the following Records Series Titles:

Retention Schedule Item No.	Record Series Title	Office	Records Center	Destroy	Vital
1.	TAX SALES OF FORECLOSED PROPERTY				P
2.	MUNICIPAL PROPERTY SALES		5	X	
3.	MUNICIPAL PROPERTY PURCHASES		7	X	
4.	MUNICIPAL PROPERTY LEASES		3	X	
5.	PRIVATE SECTOR LEASED PROPERTY		3	X	
10.	REAL ESTATE SERVICES CORRESPONDENCE	C+1	3	X	

Real Estate Services records that were included under Finance/Treasury/Tax Section's Retention Schedule (Item Numbers 4, 9, and 11), are now listed on Real Estate Services draft Records Retention Schedule as Item Numbers 6, 7, 8, and 9. The documents are organized by parcel activity instead of by document type, which resulted in 4 (four) items on the Real Estate Services Records Retention Schedule instead of the original 3 (three) from the Finance/Treasure/Taxes Records Retention Schedule.

Items to be removed from the Finance/treasury/ Taxes Records Retention Schedule are:

Retention Schedule Item No.	Record Series Title	Office	Records Center	Destroy	Vital
4	LITIGATION REPORTS AND DOCUMENTATION	C+3	7	X	
9	TAX FORECLOSURE RECORDS, JUDGMENT OF DECREE, CLERK'S DEED, PUBLICATIONS, COST WORKSHEETS, REDEMPTION CERTIFICATES, VOUCHER REQUESTS.	C+3	7	X	
11	CERTIFIED MAIL RETURN RECEIPTS,	C+3	7	X	

FORCLOSURE AND DEED, CERTIFIED
POSTAGE LIST.

Items included in the Real Estate Services Record Retention in place of Finance/Treasure/Taxes
Items Numbered 4, 9, and 11 are:

Retention Schedule	Item No.	Record Series Title	Office	Records Center	Destroy	Vital
	6	FORECLOSURE/DEED	C+3	7	X	
	7	REPURCHASED/SOLD DEEDED PARCEL FILES	C+3	7	X	
	8	TAX DEEDED PROPERTY SALES ACCOUNTING FILES	C+2	8	X	
	9	CERTIFICATES OF REDEMPTION	C+3	7	x	

THE ADMINISTRATION RECOMMENDS APPROVAL OF THE REQUEST FOR
REVISION TO THE RECORDS RETENTION SCHEDULE FOR THE REAL ESTATE
SERVICES DEPARTMENT.

Prepared by: Troy W. Swanson, Director, Information Technology Department
Concur: Denis C. LeBlanc, Municipal Manager
Respectfully submitted: Mark Begich, Mayor

Attachment



**MUNICIPALITY OF ANCHORAGE
MEMORANDUM**

DATE: October 6, 2003
TO: Terry L. Daniels, Acting Manager, IT
FROM: Carla Johnson, FRCL Specialist, Real Estate Services
SUBJECT: Draft Records Retention Schedule for Real Estate Services

As provided in the Municipal Policy/Procedures, please process Real Estate Service's "Draft Records Retention Schedule".

The Draft Retention Schedule Item Numbers 1, 2, 3, 4 and 5 are being established to accommodate storage of the indicated Records Series Titles.

Real Estate Services records that were formerly included under Finance/Treasury/Tax Section's Retention Schedule Item Numbers 4, 9, and 11 are listed on Real Estate Services Draft Records Retention Schedule as Item Numbers 6, 7, 8, and 9. In addition, the draft schedule includes a new Records Series Title 'Correspondence' under Retention Schedule Item Number 10, to accommodate storage of general correspondence.

If you have any questions, do not hesitate to contact me at X4053.

Municipality of Anchorage
Management Information Systems
Accounting & Office Services
Records Management



Mark Begich
Mayor

Date: October 28, 2003

To: Municipal Clerk Office – Barbara Gruenstein
Internal Audit – Peter Raiskums
Municipal Controller – Glenda Gibson

Thru: Chief Technology Officer – Terry Daniels


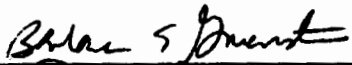


From: ITD Records Management – Dale Mayfield

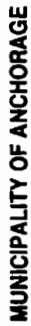
Subject: Records Retention Approval

In Accordance with Municipal Policy and Procedure 52-2.

The (Real Estate Services) Department has requested a revision to their Retention Schedule, due to the reorganization of the Department. This agency has prepared a draft Records Retention Schedule which is attached for your review and approval. If you have any questions, or find needed changes, the draft schedule must be sent back to the Department for revision. It should then be re-routed for signature. Once all approvals are received, the retention schedule should be returned to the Records Management Officer who will then submit the schedule to the Assembly for adoption. Upon final action by the Assembly the file copy of the schedule will be returned to Records Management and forwarded to agency.

I, the undersigned, have reviewed and approved this new retention schedule in accordance with Municipal Policy and Procedure 52-2:

	10-29-03
Municipal Records Management Officer	Date
	11/20/03
Municipal Clerk	Date
	11-6-03
Internal Audit	Date
	11/18/03
Controller	Date



RECORDS RETENTION SCHEDULE

For Records Center use only

Department/Division/Section										Phone #	Org. #	Revision #	Effective Date	Page
HERITAGE LAND BANK/REAL ESTATE SERVICES										343-4053	6086	1	10/3/03	1 of 1
1	2	3	4	5	6	7				REMARKS				
RETENTION SCHEDULE ITEM NO.	RECORDS SERIES TITLE	RECORD COPY HELD BY	OFFICE (years)	RECORDS CENTER (years)	FINAL ACTION MACROFILM (X) DESTROY (X)	VITAL RECORDS (X)								
1	TAX SALES OF FORECLOSED PROPERTY				() () ()	(p)				VITAL RECORDS				
2	MUNICIPAL PROPERTY SALES		5		() (X) ()	()								
3	MUNICIPAL PROPERTY PURCHASES		7		() (X) ()	()								
4	MUNICIPAL PROPERTY LEASES				() (X) ()	()								
5	PRIVATE SECTOR LEASED PROPERTY		3		() (X) ()	()								
6	FORECLOSURE/DEED		C+3	7	() (X) ()	()				PROCL/Deed vital records are recorded at the State Recorder's Office				
7	REPURCHASED/SOLD DEEDED PARCEL FILES		C+3	7	() (X) ()	()				Vital records are stored as Retention Sched. Item No. 1				
8	TAX DEEDED PROPERTY SALES ACCTG FILES		C+2	8	() (X) ()	()								
9	CERTIFICATES OF REMIGATION		C+3	7	() (X) ()	()								
10	REAL EST. SERVICES CORRESPONDENCE		C+1	3	() (X) ()	()								
					() () ()	()								
					() () ()	()								
					() () ()	()								
					() () ()	()								

EXPLANATION OF TERMS:

A = Audit + Years

Use numerical identification only.

Use general categories such as, time cards and backup material, Construction Projects, Appraisals, Audit Work Files, etc.

The official or principal copy of a record which is maintained by the agency.

The number of years which records are held by the agency and/or the Records Center. If permanent use the letter "P".

Place 'X' in the applicable column.

Numerals = Amount in Years

6 VITAL RECORDS

7 REMARKS:

91-042 (Rev 6/85) •

MUNICIPALITY ANCHORAGE

RECORDS RETENTION SCHEDULE

For Records Center use only

Department/Division/Section		Phone #	Org. #	Revision #	Effective Date	Page
FINANCE/Treasury/Taxes		343-6925	1346	1	6/12/95	1 of 2
1 RETENTION SCHEDULE ITEM NO.	2 RECORDS SERIES TITLE	3 RECORD COPY HELD BY	4 INTERIM PERIOD OFFICE (years) RECORDS CENTER (years)	5 FINAL ACTION MICROFILM (X) DESTRUCT (X)	6 VITAL RECORDS (X)	7 REMARKS
1	Tax payment batches, Batch log and monthly transaction balance reports		A+2 4	() (X)	()	
2	Tax certificates		C+2	() (X)	()	
3	Adjustment research sheets/Sup. Doc.		A+2 2	() (X)	()	Originals provided to public. Includes taxpayer correspondence filed by parcel ID#
4	Litigation Reports & Documentation		C+3 7	() (X)	()	For Deed taking.
5	Tax Refunds		A+2	() (X)	()	Copies of check requests.
6	Tax billing Register Microfilm		P	() (X)	(X)	
7	Assessor's Adjustment - Documentation		A+2 2	() (X)	()	
8	Bankruptcy Reference Records	Legal	C	() (X)	()	Pertains to real prop. tax only.
9	Tax foreclosure Records, Judgment of Decree, Clerk's Deed, Publications, Cost Worksheets, Redemption Cert.'s, Voucher Requests.		C+3 7	() (X)	()	
10	Taxes Accounts Receivable, Month End Microfilm		P	() (X)	(X)	
11	Certified mail return receipts, Frcl. & Deed, Certified Postage List		C+3 7	() (X)	()	
12	Assessor Roll Certification, Balancing Records, Sr. Citizen Daily Balancing, Tax System		C+2	() (X)	()	
13	Transaction Report		C	() (X)	()	

RETENTION CODES

A = Audit + Years

P = Permanent

C = Current

C+ = Current + Years

EXPLANATION OF TERMS:

1 RETENTION SCHEDULE ITEM NO.:

2 RECORD SERIES TITLE:

3 RECORD COPY:

4 RETENTION PERIOD:

5 FINAL ACTION:

Use numerical identification only.

Use general categories such as, time cards and backup material, Construction Projects, Appraisals, Audit Work Files, etc.

The official or principal copy of a record which is maintained by the agency.

The number of years which records are held by the agency under the Records Center. If permanent use the letter P.

Place X in the applicable column.

MUNICIPALITY ANCHORAGE

For Records Center use only

[illegible]

Place 'X' in the applicable column.

RECORDS RETENTION SCHEDULE

For Records Center use only

[illegible]

RETENTION CODES

A = Audi + Years

P = Permanent

C = Current

C + = Current + Years

Numerator = Amount in Years

EXPLANATION OF TERMS:

1 RETENTION SCHEDULE ITEM NO.:

2. RECORD SERIES TITLE:

3 RECORD COPY:

4 RETENTION PERIOD:

Place "X" in the applicable column.

9 FINAL ACTION:

Use numerical identification only.

Use general categories such as, time cards and backup material, Constructive

The official or principal copy of a record which is maintained by the agency.

On the 10th of the month, the following

Place "X" in the applicable column.

There are at least two problems and two solutions. The first problem is that the current system of financing the health care system is not sustainable. The second problem is that the current system of financing the health care system is not equitable. The first solution is to increase the tax base. The second solution is to increase the efficiency of the health care system.

Content Information**Content ID :** 001596**Type:** AR_AllOther - All Other Resolutions

Title: A Resolution of the Anchorage Municipal Assembly Approving the request to create the records retention schedule for the Real Estate Services Department, in accordance with Municipal Policy and Procedure 52.2

Author: casetl**Initiating Dept:** IT**Description:** New Records Retention Schedule for HLB/Real Estate Services.**Keywords:** HLB, RRS, Records Retention Schedule,**Date Prepared:** 3/2/04 11:30 AM**Director Name:** Troy Swanson

Assembly Meeting
Date MM/DD/YY: 03/16/04

Workflow History

<u>Workflow Name</u>	<u>Action Date</u>	<u>Action</u>	<u>User</u>	<u>Security Group</u>	<u>Content ID</u>
AllOtherARWorkflow	3/2/04 11:43 AM	Checkin	casetl	Public	001596
IT_SubWorkflow	3/2/04 12:34 PM	Approve	swansontw	Public	001596
MuniManager_SubWorkflow	3/10/04 1:57 PM	Approve	katkusja	Public	001596
MuniMgrCoord_SubWorkflow	3/10/04 1:57 PM	Approve	katkusja	Public	001596

ADDENDUM – CONSENT AGENDA-RESOLUTIONS FOR ACTION-OTHER

2004 MAR 10 PM 2:51
 CLEARING OFFICE