

# RECORDS RETENTION SCHEDULE

RC-50 - Revised 3/2006

(Return to Public Records Administrator)



STATE OF CONNECTICUT  
 Connecticut State Library  
 PUBLIC RECORDS ADMINISTRATION  
 231 Capitol Ave., Hartford, CT 06106

FOR OFFICE USE ONLY  
 Retention Schedule # 08-6-1

<b>AGENCY:</b> Teachers' Retirement Board	<b>ADDRESS:</b> 765 Asylum Avenue, Hartford, CT 06105
<b>DIVISION or UNIT:</b> Agency-wide	

This schedule is:  original;  revised.  
 If revised, enter previous retention schedule number here: # \_\_\_\_\_

Item Number	RECORD SERIES <sup>1</sup> TITLE	APPROVED RETENTION PERIOD			Legal Requirements
		Office (A)	Off-site <sup>2</sup> (B)	Total (A + B)	
1	<b>Member Files</b> Consists of records of individuals who contribute to the State Teacher's Retirement System, as well as those receiving contributions or benefits. Includes, but not limited to applications for membership, for disability, for purchase of additional service, for withdrawal of voluntary account, or for withdrawal of a member's deposits; beneficiary designation; address/name change; annual statement of benefits; and appeals to the board. Files are arranged alphabetically by member's last name. Upon death of member, file is renamed to co-participant (spouse or beneficiary) or money is paid-out in a lump-sum.	2 years from date of member's death	8 years from date of member's death	10 years from date of member's death	
2	<b>Member Files (Unclaimed Contributions)</b> Consists of records of individuals who contributed to the State Teacher's Retirement System, but have not claimed their contributions or other such benefits. Includes, but not limited to applications for membership, for disability, and for purchase of additional service; beneficiary designation; address/name change; annual statement of benefits; and appeals to the board. Files are arranged alphabetically by member's last name.	Permanent	N/A	Permanent	Pursuant to CGS Sec. 10-183ee.

<sup>1</sup> A Record Series is a group of similar or related records arranged under a single filing system or kept together as a unit because they relate to a particular subject, result from the same activity, or have a particular form.

<sup>2</sup> The State Records Center or an approved off-site facility. Records with a permanent retention period cannot be stored at the State Records Center. If you believe a record should be maintained permanently outside the office, it should be appraised for possible transfer to the State Archives. In this case, leave blank, and the State Archivist will review it.

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		Office (A)	Off-site <sup>2</sup> (B)	Total (A + B)	
3	<p><b>Member Participant Data (Hard copy)</b>                      Consists of data gathered about members who contribute to the State Teacher's Retirement System to provide a history of payroll, promotion, and discipline. Includes, but not limited to data about salary, date of birth, social security number, marital status, telephone numbers, addresses, educational and medical history, and bank account information. Files are arranged in hard copy binders.</p>	Permanent / Archival	N/A	Permanent / Archival	Regulations of Connecticut State Agencies (RCSA) Sec. 10-183l-17(h)(3), participant data is retained permanently; Files until 1999 were maintained in hard copy binders.
4	<p><b>Member Participant Data (Electronic copy)</b>                      Consists of data gathered about members who contribute to the State Teacher's Retirement System to provide a history of payroll, promotion, and discipline. Includes, but not limited to data about salary, date of birth, social security number, marital status, telephone numbers, addresses, educational and medical history, and bank account information. Files are arranged alphabetically by member's last name in database.</p>	Continuously Updated	N/A	Continuously Updated	Regulations of Connecticut State Agencies (RCSA) Sec. 10-183l-17(h)(3), participant data is retained permanently; Data from 1999 to current is maintained in database.

Approved ( <i>Agency Records Management Liaison Officer</i> ) <i>Leanne Appleton</i> (signature on file)	Typed Name of RMLO: Leanne Appleton	Title: Assistant Administrator	Date: 8/15/2008
Approved ( <i>State Archivist</i> ) <i>Mark H. Jones</i> (signature on file)	Date: 08/15/2008	Approved ( <i>Public Records Administrator</i> ): <i>Eunice G. DiBella</i> (signature on file)	Effective Date of Schedule: 8/18/2008