

Drive Date and Override

Calculate the Drive Date

The Drive Date is used to help calculate the Eligible Destruction Date of records sent to the Texas State Library for Storage at the State Records Center. A Drive Date is required to calculate the Eligible Destruction Date.

Drive Date + Total Retention = Eligible Destruction Date

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Eligible Destruction Date – Total Retention = Drive Date

If the Total Retention contains...

The Drive Date is...

- AC The Close Date* for the records. Any date between the Final Inclusive Date and the day the Request Pickup is being submitted.
- FE August 31 of the Fiscal Year of the Final Inclusive Date.
(Fiscal Year = Sept. 1 to Aug. 31)
Example: Final Inclusive Date: 10/15/2014, Drive Date is 08/31/2015
- FFE September 30 of the Federal Fiscal Year of the Final Inclusive Date.
(Federal Fiscal Year = Oct. 1- Sept. 30)
Example: Final Inclusive Date: 12/15/2014, Drive Date is 09/30/2015
- LA When the Life of Asset for the record has expired. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.
- US When the record has been superseded. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.
- PS When the record has fulfilled its Purpose Served. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.
- AV When the record is no longer administratively valuable. Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.
- Years and/or Months Only Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted.
- PM Any Close Date* between the Final Inclusive Date and the day the Request Pickup is being submitted. There is no disposal date for Permanent records but a Retention Drive Date is required in case the Retention amounts are changed in the future.

*Close Date is the date when records are no longer active. The agency user determines this date.

Do I need to click the checkbox for Override after I complete the Drive Date field?

Do not click this checkbox UNLESS any **one** of the below conditions is met:

- Total Retention contains **FE** (in the Event Based column for Record Series in TexLinx) **and** the Drive Date is any date other than 08/31 of the fiscal year of the Final Inclusive Date.
- Total Retention contains **CE** (in the Event Based column for Record Series in TexLinx) **and** the Drive Date is any date other than 12/31 of the calendar year of the Final Inclusive Date.
- Total Retention contains only Years and/or Months (**no information appears in the Event Based column** for Record Series in TexLinx) **and** the Drive Date is any date other than the Final Inclusive Date.

If one of the above three conditions is met, click the checkbox for Override.