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**A-06-017-10 Certificates On-Line (COLA)**

**Description:** COLA is an application used by personnel in Department offices to enter data for length-of-service and other awards for Certificates produced by GPS. Customers enter data via a browser at their desktop. COLA stores all information entered on the Certificate, generates a billing estimate, and serves as a portal for GPS to view all active jobs and process them. The application also generates usage, billing, and statistical information, and weekly/monthly reports. Data is exported to a financial application used to produce and bill customers for completed work.

**Disposition:** Temporary. Destroy when no longer needed. (Supersedes GRS 23, item 8)

**DispAuthNo:** GRS 4.1, Item 010

**Date Edited:** 3/9/2017

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**A-06-018-08a**                      **Regulatory and Procedural Issuance**

**Description:**                      Series of regulatory and procedural issuances of the Department including the Foreign Affairs Manual, Foreign Affairs Handbooks, and Change Transmittal letters (CTs), organization charts of the Department of State, and numbered delegations of authority.

a. One complete hard copy master set of each series final issuances as of the last day of each calendar year, and all superseded versions of those issuances that were revised during that same calendar year including the Foreign Affairs Manual, Foreign Affairs Handbooks, Change Transmittal letters (CTs), organizational charts of the Department of State and numbered delegations of authority. Existing hard copy files have been retroactively scanned from 1961 through December 31, 2010. NOTE: Records dating from January 1, 2011 to present are all electronic and records dating from December 31, 2000 and back are hard copy only.

**Disposition:**                      PERMANENT. Cutoff records of completed series at the end of the calendar year. Retire the hard copy files to RSC 10 years after cutoff for transfer to WNRC. Transfer electronic records to the National Archives for pre-accessioning 5 years(s) after cutoff. Transfer to National Archives in 10 years blocks 25 years after cutoff. (Supersedes N1-59-95-4, item 29a)

**DispAuthNo:**                      DAA-0059-2012-0006-0001                      **Date Edited:**                      12/13/2013

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**A-06-018-08b**                      **Regulatory and Procedural Issuance**

**Description:**                      b. Electronic copy. File containing electronic copy of all record series scanned documents through December 31, 2010 and all current input scanned and/or received in electronic form beginning January 1, 2011.

**Disposition:**                      PERMANENT. Cutoff records of completed series at end of the calendar year. Retain completed series on-line for 10 years. Transfer electronic records to the National Archives for pre-accessioning 5 years(s) after cutoff. Transfer to the National Archives in 10 years blocks 25 years after cutoff in a medium and format acceptable to NARA in accordance with NARA regulations and guidance in effect at the time of transfer. (Supersedes N1-59-95-4, item 29b)

**DispAuthNo:**                      DAA-0059-2012-0006-0001                      **Date Edited:**                      12/13/2013

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**A-06-018-09a**                      **Regulatory and Procedural Docket Files**

**Description:** a. Consists of docket files for each revision to issuances in the Foreign Affairs Manual, Foreign Affairs Handbooks, and organization charts of the Department of State; each containing request for issuance revisions (Form DS-809), working drafts of revised issuance, e-mail correspondence, clearances and clearers comments, final version for publication, and Change Transmittal letter (CT). Hard copy documents cover the period from start through December 31, 2010. All documents provided in electronic form beginning January 1, 2011.

**Disposition:** PERMANENT. Cutoff at the end of the calendar year in which the records become 10 years old. Retire to RSC for transfer to WNRC. Transfer electronic records to the National Archives for pre-accessioning 5 years(s) after cutoff. Transfer to National Archives when 25 years old in a format acceptable to National Archives at the time of transfer. (Supersedes NC-59-95-4, item 29c)

**DispAuthNo:** DAA-0059-2012-0006-0002                      **Date Edited:** 12/13/2013

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**A-06-018-09b**                      **Regulatory and Procedural Docket Files**

**Description:** b. Electronic copy.

**Disposition:** PERMANENT. Cutoff copies of completed series at end of each calendar year. Retain completed series on-line for 10 years. Transfer to the National Archives when 25 years old in a format acceptable to the National Archives at the time of transfer.

**DispAuthNo:** DAA-0059-2012-0006-0002                      **Date Edited:** 12/13/2013

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**A-06-018-10**                      **Forms Control Files**

**Description:** Background docket materials, requisitions, specifications, processing data, control records and the form(s). Files in electronic format as of January 1, 2011.

**Disposition:** TEMPORARY. Destroy/delete active docket material with prior revisions when 7 years old or when discontinued, whichever is sooner. (Supersedes NC-59-75-14, item 10a)

**DispAuthNo:** DAA-0059-2012-0006-0003                      **Date Edited:** 12/13/2013

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#### A-06-018-11 Department of State Information Collections

**Description:** Docket files for Department of State Information Collections, one docket per Office of Management and Budget (OMB) submission. Docket file contains; supporting statement, legal authorities, working copies of all required documents, published Federal Register notices, Internal Clearance Sheet, Form 831, OMB Form 83c, the collection instrument, public comments, and copy of final package submitted to OMB, Service for Citizens sheet, and Notice of Action from OMB, and all correspondence pertaining to submission. All provided in electronic form as of 01/01/11.

**Disposition:** TEMPORARY. Cutoff completed files at the end of each calendar year. Retire hard copy files to RSC 7 years after cutoff. Destroy 25 years after cutoff.

**DispAuthNo:** DAA-0059-2012-0006-0004      **Date Edited:** 12/13/2013

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#### A-06-018-12a Department of State Initiated Rules

**Description:** a. Docket files for Department of State Rules (Proposed, Interim and/or Final) Docket file contains: draft copy of Rule form originator, rules as published in Federal Register and all email and written correspondence between the Department, other agencies and the Office of Management and Budget, as well as public comments. All provided in electronic form as of 01/01/11.

**Disposition:** PERMANENT. Cutoff records of completed series at the end of the calendar year. Retire the hard copy files to RSC 7 years after cutoff for transfer to WNRC. Transfer electronic records to the National Archives for pre-accessioning 5 years after cutoff. Transfer to the National Archives in 10 year blocks 25 years after cutoff in a medium and format acceptable to NARA in accordance with NARA regulations and guidance in effect at the time of transfer.

**DispAuthNo:** DAA-0059-2012-0006-0005      **Date Edited:** 12/13/2013

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#### A-06-018-12b Department of State Initiated Rules

**Description:** b. Electronic copies

**Disposition:** Permanent. Cutoff records of completed series at the end of the calendar year. Transfer electronic records to the National Archives for pre-accessioning 5 years after cutoff. Transfer records to the National Archives in 10 year blocks 25 years after cutoff in a medium and format acceptable to NARA in accordance with NARA regulations and guidance in effect at the time of transfer.

**DispAuthNo:** DAA-0059-2012-0006-0005      **Date Edited:** 12/13/2013

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#### A-06-018-13 Other Agency Proposed Rules

**Description:** Docket files for Rules proposed by other Agencies and commented on by the Department of State. Docket file contains: request for review from the Office of Management and Budget, copy of proposed Rule from originating Agency and all email and written correspondence between the Department, other agencies and the Office of Management and Budget. All rules proposed by other Agencies are received in electronic form as of 01/01/11.

**Disposition:** TEMPORARY. Cutoff completed files at the end of each calendar year. Destroy 3 years after cutoff.

**DispAuthNo:** DAA-0059-2012-0006-0006      **Date Edited:** 12/13/2013

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#### A-06-018-14 Regulations and Notice Published in the Federal Register

**Description:** Contains docket files for documents published in the Federal Register; each containing original document submitted to A/GIS/DIR with signature page, final document sent to Federal Register, email correspondence, and copy of document as it was published in the Federal Register. Covers the period from start-up through December 31, 2010 in hard copy. All documents scanned and provided in electronic form beginning January 1, 2011.

**Disposition:** TEMPORARY. Destroy when 2 years old. (Supersedes NC-59-75-14, item 2)

**DispAuthNo:** DAA-0059-2012-0006-0007      **Date Edited:** 12/13/2013

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#### A-06-018-15 Office Operating Policies and Procedures Files

**Description:** Office standard operating policies and procedures on producing the Foreign Affairs Manual, Foreign Affairs Handbooks, Delegations of Authorities, Centralized Forms, Information Collections, Rulemaking, and Federal Register submissions. All provided in electronic form beginning January 1, 2011.

**Disposition:** TEMPORARY. Cutoff when superseded or obsolete. Destroy 15 years after cutoff. (Supersedes NC-59-75-14, item 3)

**DispAuthNo:** DAA-0059-2012-0006-0008      **Date Edited:** 12/13/2013

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#### A-06-018-16 Publication Project Files

**Description:** Correspondence, memoranda, reports and other papers on such projects as the U.S. Government Organization Manual or Executive Orders. All provided in electronic form beginning January 1, 2011.

**Disposition:** TEMPORARY. Destroy when publication are reissued. (Supersedes NC-59-75-14, item 8)

**DispAuthNo:** DAA-0059-2012-0006-0009      **Date Edited:** 12/13/2013

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#### A-06-018-17 Directives Management Website Web Content

**Description:** The Directives Management website (Intranet) is intended for the purpose of supporting its user by publishing up-to-date copies (most recent version) of the Foreign Affairs Manual (FAM) and Foreign Affairs Handbook (FAH), maintaining a master list of relevant delegations of authority, Presidential determinations, Presidential memoranda, supervising the Departments of collection of information from the public, managing the Departments centralized forms program, and acting as the Department's coordinator for Federal rulemaking and Federal Register liaison. The web content records consist of web pages that contain duplicate information captured and maintained in other directives recordkeeping systems. The content changes as needed and no privacy information is contained on the website.

**Disposition:** TEMPORARY. Destroy/delete pages as they are superseded or no longer needed for reference.

**DispAuthNo:** DAA-0059-2012-0006-0010      **Date Edited:** 12/13/2013

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#### A-06-018-18 OMB Reporting File

**Description:** Routine reports submitted to OMB, or another oversight entity, which are not covered by another disposition authority. Reports contain information used by the receiving entity to perform oversight duties and track the status of Agency projects or activities.

**Disposition:** TEMPORARY. Destroy 10 years after OMB or other oversight entity discontinues the reporting requirement for each report.

**DispAuthNo:** DAA-0059-2012-0006-0011      **Date Edited:** 12/13/2013

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#### A-06-018-19 Records about Authorizing and Managing Report Requirements and Parameters

**Description:** Reports including case files on recurring administrative, interagency, Congressional and executive branch reports.

Processing and submission files on reports an agency creates or proposes. Includes copies of authorizing directives; preparation instructions; descriptions of required or standardized formats; clearance forms; and documents on evaluating, continuing, revising, and discontinuing reporting requirements.

**Disposition:** Temporary. Destroy 2 years after the report is discontinued, but longer retention is authorized if required for business use. (Supersedes GRS 16, item 6)

**DispAuthNo:** DAA-GRS-2017-0008-0004 (G      **Date Edited:** 1/18/2018

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#### A-06-018-20 Forms Files

**Description:** Department of State centralized active/discontinued form files containing the request for form creation (DS-1855), any requests for form revisions, email or written correspondence, form design notes, approval to publish and approval to discontinue.

a. Maintained in hard copy/electronic format from start-up through December 31, 2010. Files provided in electronic format as of January 1, 2011.

**Disposition:** Temporary. Destroy 3 years after form is discontinued, superseded, or cancelled, but longer retention is authorized if needed for business use. (Supersedes GRS 16, item 3a)

**DispAuthNo:** GRS 4.1, Item 040

**Date Edited:** 3/9/2017

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#### A-06-018-21 Web Site Management and Operation Records

**Description:** Files consist of documents created or received in the development, design, implementation, operations, and maintenance of the Directives Management website. Statistical data is maintained in Net tracker by A Bureau recording data documenting user interaction with the site. Net tracker sees who views the site, what is viewed, and can determine the location of the users.

**Disposition:** TEMPORARY. Destroy 3 years after agreement, control measures, procedures, project, activity, or transaction is obsolete, completed, terminated, or superseded. (Supersedes GRS 24, item 8a).

**DispAuthNo:** GRS 3.1, item 020

**Date Edited:** 5/4/2015

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#### A-06-018-22 Records Common to Most Organizational Areas

**Description:** Chapter 3 of the U.S. Department of State Domestic Records Disposition Schedule, Records Common to Most Organizational Areas, provides for the disposal of certain records common to most offices in the Department. It covers administrative subject files; facilitative records such as suspense files, tracking and control records, calendars, information technology operations and management records, and indexes; and transitory documents. If records are not located here or elsewhere in these schedules contact Records and Archives Management Division (A/GIS/IPS/RA) for assistance.

**Disposition:** N/A

**DispAuthNo:** N/A

**Date Edited:** 12/13/2013

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**A-06-018-23**      **Mandatory Reports to External Federal Entities Regarding Administrative Matters**

**Description:** Information Collection Budget Files. Reports required by OMB under the Paperwork Reduction Act about the number of hours the public spends fulfilling agency reporting requirements. Included are associated feeder reports, reports exhibits, correspondence, directives, and statistical complications

**Disposition:** Temporary. Destroy 6 years after report submission or oversight entity notice of approval, as appropriate, but longer retention is authorized if required for business use. (Supersedes GRS 16, item 12)

**DispAuthNo:** DAA-GRS-2017-0008-0005 (G      **Date Edited:** 1/18/2018

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**A-06-018-24**      **Internal Administrative Accountability and Operational Management Control Records**

**Description:** Internal evaluations of accounting and administrative controls, mandated or governed by OMB Circulars A-123, A-130, and A-76; Government Accountability Office's (GAO) Standards for Internal Control in the Federal Government (the "Green Book"); and similar requirements or directives. Includes:

- copies of internal and external directives outlining management control policy
- management control plans and records of the planning process
- records of management reviews
- comprehensive plans documenting agency efforts to comply with OMB Circular A-123 and similar requirements
- risk analyses and risk profiles
- internal controls over reports
- feeder reports and compliance statements from agency components contributing to consolidated reports the agency submits to the President/OMB or Congress (see Exclusion 2)
- records tracking assignments, tasks, and responsibilities
- administrative correspondence

Exclusion 1: Reports related to agency mission activities (agencies schedule these separately).

Exclusion 2: Consolidated final agency reports submitted to the President/OMB or Congress (agencies schedule these separately).

Exclusion 3: Reports that mandating agencies receive (these agencies must schedule them separately).

**Disposition:** Temporary. Destroy 1 year after submission or when superseded, as appropriate, but longer retention is authorized if required for business use. (Supersedes GRS 16, item 14d)

**DispAuthNo:** DAA-GRS-2017-0008-0001 (G      **Date Edited:** 1/18/2018

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**Office of Information Programs and Services (A/GIS/IPS) - Library****A-06-019-01a**                      **Library Program - Subject Files**

**Description:** Correspondence, memorandums, reports, histories, speeches, and other documentation on the library covering items relating to acquisitions, audio cassettes recordings, books, cataloging, computerized check out, database research, electronic catalog, embassy commercial library program, facilities, foreign affairs, historical books, holdings, inter-library activities, library authors series, maps, microfilm and microfiche historical collections, monthly statistical workload reports, organizational moves, periodicals, policies, procedures, programs, publications, rare book program, reference services, resources, significant acquisitions, special collections, speeches, technical development, and other related subjects.

a. Historically Significant Topics - Arranged by TAGS and Terms.

**Disposition:** Cut off at end of each calendar year. Retain in Library until obsolete or no longer needed for reference use. (ref. NC1-59-80-21, item 1a)

**DispAuthNo:** N1-059-95-04, item 30a                      **Date Edited:** 4/1/1999

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**A-06-019-01b**                      **Library Program - Subject Files**

**Description:** Correspondence, memorandums, reports, histories, speeches, and other documentation on the library covering items relating to acquisitions, audio cassettes recordings, books, cataloging, computerized check out, database research, electronic catalog, embassy commercial library program, facilities, foreign affairs, historical books, holdings, inter-library activities, library authors series, maps, microfilm and microfiche historical collections, monthly statistical workload reports, organizational moves, periodicals, policies, procedures, programs, publications, rare book program, reference services, resources, significant acquisitions, special collections, speeches, technical development, and other related subjects.

b. Other Program Subject Files - Arranged by TAGS and Terms.

**Disposition:** Cut off at end of each calendar year. Destroy 3 years after cut off date.

**DispAuthNo:** N1-059-95-04, item 30b                      **Date Edited:** 4/1/1999

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**A-06-019-02a**      **Procurement Files**

**Description:** Contracts, correspondence, purchase orders, requisitions, and other documentation on purchase orders covering administration, award, books, inspection, receipt, payment, periodicals, procurement, publishers, vendors, requisitions (Requisition for Equipment, Supplies, Furniture, Furnishings, or Services (OF-263)), and other related subjects.

a. Vendor File. Correspondence with publishers regarding the procurement of books, periodicals, etc.

**Disposition:** Destroy when 3 years old.

**DispAuthNo:** NC1-059-80-21, item 3

**Date Edited:** 4/1/1999

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**A-06-019-02b**      **Procurement Files**

**Description:** Contracts, correspondence, purchase orders, requisitions, and other documentation on purchase orders covering administration, award, books, inspection, receipt, payment, periodicals, procurement, publishers, vendors, requisitions (Requisition for Equipment, Supplies, Furniture, Furnishings, or Services (OF-263)), and other related subjects.

b. Chronological Files. Arrange by Purchase Order Number.

**Disposition:** Destroy when one year old or when no longer needed.

**DispAuthNo:** Non-Record

**Date Edited:** 4/1/1999

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**A-06-019-02c(1)**      **Procurement Files**

**Description:** c. Publications Procurement Files.

(1) General correspondence with organizational elements of the Department regarding purchase of books, periodicals, etc.

**Disposition:** Destroy when 3 years old.

**DispAuthNo:** NN-171-132, item 4a

**Date Edited:** 4/1/1999

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<b>A-06-019-02c(2)</b>	<b>Procurement Files</b>
<b>Description:</b>	c. Publications Procurement Files.  (2) Contracts, requisitions, purchase orders and related papers pertaining to award, administration, receipt, inspection and payment.
<b>Disposition:</b>	Temporary. Destroy 6 years after final payment or cancellation. (Supersedes GRS 3, item 3a[2]).
<b>DispAuthNo:</b>	GRS 1.1, item 010
	<b>Date Edited:</b> 4/30/2015
<b>A-06-019-02d(1)</b>	<b>Procurement Files</b>
<b>Description:</b>	d. Post Files.  (1) Foreign Publications. Correspondence with posts requesting them to acquire certain foreign publications with related invoices, vouchers, etc.
<b>Disposition:</b>	Destroy when 3 years old.
<b>DispAuthNo:</b>	NN-171-132, item 5
	<b>Date Edited:</b> 4/1/1999
<b>A-06-019-02d(2)</b>	<b>Procurement Files</b>
<b>Description:</b>	d. Post Files.  (2) Library Service. Correspondence with posts regarding post requests for publications including related requisitions.
<b>Disposition:</b>	Destroy when 3 years old.
<b>DispAuthNo:</b>	NN-171-132, item 6
	<b>Date Edited:</b> 4/1/1999

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#### A-06-020-06 DS-693 Files - Retirement of Records

**Description:** Master set of original DS-693s and DS-693Bs used by the Department Central Records Research Staff to authoritatively determine the official status of all Department and posts records retired. The DS-693s and DS-693Bs are also annotated to document each change in the status of the records whenever the changes occur. The forms cover office/agency box numbers, RSC lot numbers and space numbers, WNRC accession numbers, NARA job numbers, volume, security classification, records control schedule number, recommendations for disposition, general description of records including inclusive dates, office/post box number, box number, lot number assigned, and box contents list.

**Disposition:** PERMANENT. Use in Department as a master finding aid for researchers and scholars. Transfer to NARA when no longer needed for reference.

**DispAuthNo:** NC-059-75-17, item 3

**Date Edited:** 4/1/1999

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#### A-06-020-07 Microimage Records Files

**Description:** Correspondence, memorandums, and other documentation on micro-records covering cameras, equipment, film, filming, microfiche, microfilm, Microfilm Library, photocopiers, quality controls, reader-printers, supplies, and other related subjects.

**Disposition:** TEMPORARY. Destroy when 3 years old.

**DispAuthNo:** N1-059-95-04, item 37

**Date Edited:** 4/1/1999

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**Office of General Services Management****A-06-021-01 Foreign Service Employee Emergency Locator Records**

**Description:** The purpose of this Employee Services Center database is to provide locator and emergency next of kin information that can be used when handling death cases for Foreign Service personnel, including liaison between the Department and surviving families. It can also be used for next of kin emergency notification in support of crisis and Task Force Operations and post evacuations, and for mail holding and forwarding information. Foreign Service personnel who wish to participate voluntarily provide all information. The database was recently opened to any U.S. Government employee who is assigned to a foreign post. Privacy restrictions apply. See State System 12, Foreign Service Employee Locator/Notification Records.

**Disposition:** TEMPORARY: See sub sections 01a through 01c(2) for specific dispositions.

**DispAuthNo:** N1-059-02-05, item 1 **Date Edited:** 7/16/2007

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**A-06-021-01a Foreign Service Employee Emergency Locator Records**

**Description:** a. Inputs: Electronic and paper (OP-190 and DS-924) inputs containing name, agency, current post of assignment, Washington area address and telephone number, instructions for forwarding mail, names of dependents, and names of contacts for emergency purposes.

**Disposition:** TEMPORARY: Delete/destroy after input to the master file is verified.

**DispAuthNo:** N1-059-02-05, item 1a **Date Edited:** 7/16/2007

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**A-06-021-01b Foreign Service Employee Emergency Locator Records**

**Description:** b. Master file: Contains general locator, mail and package forwarding address, dependent, and emergency notification information. Updated as needed by individual employee or authorized Employee Service Center personnel.

**Disposition:** TEMPORARY: Delete employee record 5 years after the employee resigns or retires.

**DispAuthNo:** N1-059-02-05, item 1b **Date Edited:** 7/16/2007

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<b>A-06-021-01c(1)</b>	<b>Foreign Service Employee Emergency Locator Records</b>
<b>Description:</b>	c. Outputs: Hardcopy and/or soft copy display of employee record for returning employee review and update, for crisis list of employees at a particular site, or, for receptionist to answer queries as to the location of employees who have given permission for release of information.
<b>Disposition:</b>	TEMPORARY: Destroy/delete when no longer needed by employee or Employee Services Center authorized personnel.
<b>DispAuthNo:</b>	N1-059-02-05, item 1c(1) <b>Date Edited:</b> 7/16/2007
<b>A-06-021-01c(2)</b>	<b>Foreign Service Employee Emergency Locator Records</b>
<b>Description:</b>	c. Output: CD-ROM containing employee records of those individuals who have not modified their master file record for a period of five years. Employee record is returned to the master file upon updating of the record.
<b>Disposition:</b>	TEMPORARY: Delete employee record 5 years after the employee resigns or retires.
<b>DispAuthNo:</b>	N1-059-02-05, item 1c(2) <b>Date Edited:</b> 7/16/2007
<b>A-06-021-02a</b>	<b>Leave Data - Departure for Post (DS-1552) File</b>
<b>Description:</b>	a. File contains paper copies of Form DS-1552 prepared and verified by the employee and Employee Services Center personnel. Form DS-1552 is submitted as the initial step in the process of transferring pay and leave authority from domestic payroll in Washington to the overseas payroll center in Charleston, SC upon employee departure for post. Forms are filed in alphabetical order by month.
<b>Disposition:</b>	TEMPORARY: Cutoff at end of calendar year. Maintain in current file area for 2 years and destroy.
<b>DispAuthNo:</b>	N1-059-02-05, item 2a <b>Date Edited:</b> 7/16/2007
<b>A-06-021-02b</b>	<b>Leave Data - Departure for Post (DS-1552) File</b>
<b>Description:</b>	b. Electronic copies produced on electronic mail or word processing systems.
<b>Disposition:</b>	TEMPORARY: Delete once recordkeeping copy has been produced.
<b>DispAuthNo:</b>	N1-059-02-05, item 2b <b>Date Edited:</b> 7/16/2007

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<b>A-06-021-03a</b>	<b>Leave, Travel, and Consultation Status (DS-1707) File</b>
<b>Description:</b>	a. File contains paper copies of Form DS-1707, which are prepared and verified by the employee and Employee Services Center. This form is sent to the Personnel Technician and used to transfer the employee to domestic payroll, and initiate any appropriate locality pay. The DS-1707 also reconciles all leave and travel. Forms are filed in alphabetical order by month.
<b>Disposition:</b>	TEMPORARY: Cutoff at end of calendar year. Maintain in current file area for 2 years and destroy.
<b>DispAuthNo:</b>	N1-059-02-05, item 3a
	<b>Date Edited:</b> 7/16/2007
<b>A-06-021-03b</b>	<b>Leave, Travel, and Consultation Status (DS-1707) File</b>
<b>Description:</b>	b. Electronic copies produced on electronic mail or word processing systems.
<b>Disposition:</b>	TEMPORARY: Delete once recordkeeping copy has been produced.
<b>DispAuthNo:</b>	N1-059-02-05, item 3b
	<b>Date Edited:</b> 7/16/2007
<b>A-06-021-04a</b>	<b>Death Case File</b>
<b>Description:</b>	a. File contains information used for handling death while in-service cases for both Foreign Service and Civil Service personnel, including notification of next of kin, and liaison between the Department and surviving families. Consists of copies of memorandums and letters for benefits, and life insurance forms.
<b>Disposition:</b>	TEMPORARY: Destroy 20 years after case is closed.
<b>DispAuthNo:</b>	N1-059-02-05, item 4a
	<b>Date Edited:</b> 7/16/2007
<b>A-06-021-04b</b>	<b>Death Case File</b>
<b>Description:</b>	b. Electronic copies produced on electronic mail or word processing systems.
<b>Disposition:</b>	TEMPORARY: Delete once recordkeeping copy has been produced.
<b>DispAuthNo:</b>	N1-059-02-05, item 4b
	<b>Date Edited:</b> 7/16/2007
<b>A-06-021-05</b>	<b>General Services Policy and Procedures File</b>
<b>Description:</b>	Consists of memoranda, studies and reports on significant plans, decisions and problems concerning the buildings management program.
<b>Disposition:</b>	TEMPORARY: Hold in current file area and destroy previous versions when superseded or revised policies or procedures are received.
<b>DispAuthNo:</b>	N1-059-03-10, item 1
	<b>Date Edited:</b> 8/2/2005

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<b>A-06-021-20a</b>	<b>Motor Vehicle Operating Reports and Statistics</b>
<b>Description:</b>	Daily Vehicle Reports
<b>Disposition:</b>	TEMPORARY: Cutoff at end of month. Delete/destroy 3 months after cutoff.
<b>DispAuthNo:</b>	N1-059-03-10, item 10a <b>Date Edited:</b> 7/21/2005
<b>A-06-021-20b</b>	<b>Motor Vehicle Operating Reports and Statistics</b>
<b>Description:</b>	Weekly and Monthly Operating Statistics
<b>Disposition:</b>	TEMPORARY: Cutoff at end of month. Delete/destroy when 1 year old.
<b>DispAuthNo:</b>	N1-059-03-10, item 10b <b>Date Edited:</b> 7/21/2005
<b>A-06-021-20c</b>	<b>Motor Vehicle Operating Reports and Statistics</b>
<b>Description:</b>	Annual Reports.
<b>Disposition:</b>	TEMPORARY: Cutoff at end of fiscal year. Delete/destroy 3 years after cutoff.
<b>DispAuthNo:</b>	N1-059-03-10, item 10c <b>Date Edited:</b> 7/21/2005
<b>A-06-021-21</b>	<b>Gasoline and Car Wash Tickets and Related Paid Invoices</b>
<b>Description:</b>	Contains copies of gas, oil, and wash tickets and related paid invoices.
<b>Disposition:</b>	TEMPORARY: Cutoff at end of fiscal year. Delete/destroy 6 months after cutoff.
<b>DispAuthNo:</b>	N1-059-03-10, item 11 <b>Date Edited:</b> 7/21/2005
<b>A-06-021-22a</b>	<b>Motor Vehicle Accident File</b>
<b>Description:</b>	Contains records related to motor vehicle accidents maintained by transportation office, including motor vehicle accident report, statements of drivers and witnesses, and investigative and other related reports.  If damage to vehicle.
<b>Disposition:</b>	TEMPORARY: Maintain for life of vehicle. Destroy 6 months after disposal of vehicle.
<b>DispAuthNo:</b>	N1-059-03-10, item 12a <b>Date Edited:</b> 7/21/2005

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<b>A-06-021-22b</b>	<b>Motor Vehicle Accident File</b>
<b>Description:</b>	Contains records related to motor vehicle accidents maintained by transportation office, including motor vehicle accident report, statements of drivers and witnesses, and investigative and other related reports.  If serious bodily injury, death, or major property damage.
<b>Disposition:</b>	TEMPORARY: Cutoff after accident or claim is settled. Delete/destroy 7 years after accident or settlement of claim, whichever is later.
<b>DispAuthNo:</b>	N1-059-03-10, item 12b <b>Date Edited:</b> 7/21/2005
<b>A-06-021-23a</b>	<b>AUDIOVISUAL SERVICES</b>
	<b>Official State Department Photography</b>
<b>Description:</b>	Contains negatives relating to the foreign affairs of the U.S., high level or significant State Department personnel and foreign officials. Arrange chronologically or numerically by date of negative and job number. File growth averages 334 negatives or two cubic feet per year with about 1670 negatives currently on hand. 1993 to present.
<b>Disposition:</b>	PERMANENT: Arrange in 5-year blocks. Retire to RSC 5 years after the last year in the block and transfer (with associated log) immediately to NARA.
<b>DispAuthNo:</b>	N1-059-03-10, item 13a <b>Date Edited:</b> 7/22/2005
<b>A-06-021-23b</b>	<b>Official State Department Photography</b>
<b>Description:</b>	Contains digital images generated (scanned) from negatives relating to the foreign affairs of the U.S., high level or significant State Department personnel and foreign officials. Arrange chronologically or numerically by date of negative and job number.
<b>Disposition:</b>	PERMANENT: Arrange in 5-year blocks. Retire to RSC 5 years after the last year in the block and transfer (with associated log) immediately to NARA.
<b>DispAuthNo:</b>	N1-059-03-10, item 13b <b>Date Edited:</b> 7/22/2005
<b>A-06-021-23c</b>	<b>Official State Department Photography</b>
<b>Description:</b>	Original digital (born digital) images relating to the foreign affairs to the U.S., high level or significant State Department personnel and foreign officials. Arrange chronologically and numerically by date of scanned image and job number.
<b>Disposition:</b>	PERMANENT: Arrange in 5-year blocks. Retire to RSC 5 years after the last year in the block and transfer (with associated log) immediately to NARA.
<b>DispAuthNo:</b>	N1-059-03-10, item 13c <b>Date Edited:</b> 7/22/2005

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**A-06-021-23d**                      **Official State Department Photography**

**Description:** Assignment logs, indexes, or other finding aids in hard copy and/or in electronic form providing access to the negatives and digital images.

**Disposition:** PERMANENT: Transfer to NARA with the corresponding negatives and/or digital images in items 23a through 23c.

**DispAuthNo:** N1-059-03-10, item 13d                      **Date Edited:** 7/22/2005

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**A-06-021-23e**                      **Official State Department Photography**

**Description:** Contains uncaptioned negative and/or digital images of routine award ceremonies, social events, activities, not related to the mission of the Department, personnel identification or passport images, and other routine administrative or personnel related to the Department mission. (N1-059-92-18, item 1c)

**Disposition:** TEMPORARY: Distribute to requesting office or delete/destroy when no longer needed for reference.

**DispAuthNo:** N1-059-03-10, item 13e                      **Date Edited:** 7/22/2005

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**A-06-021-24a**                      **VIDEO PRODUCTION**

**Video Master File**

**Description:** Video master productions of internal communication programs that are informational, routine and non-substantive in content, such as "How to" -type and scripted event video productions. Masters are produced on Betacam SP, SVHS, digibeta tape format. Subject and/or events are arranged chronologically with number. 1995 to present.

**Disposition:** TEMPORARY: Maintain master in current file area for 5 years, then degauss, and recycle tapes.

**DispAuthNo:** N1-059-03-10, item 14a                      **Date Edited:** 7/22/2005

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**A-06-021-24b**                      **Video Master File**

**Description:** Video master productions of internal communication programs that are substantive in content or document significant events such as Secretary Town Meetings in response to terrorist attackers. Masters (since 1995) are produced on Betacam SP, SVHS, digibeta tape format. Subject and/or events are arranged chronologically with number. 1995 to present.

**Disposition:** PERMANENT: Maintain master in current file area for 10 years and then transfer the master and one copy to the National Archives in 2-year blocks.

**DispAuthNo:** N1-059-03-10, item 14b                      **Date Edited:** 7/22/2005

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<b>A-06-021-24c</b>	<b>Video Master File</b>		
<b>Description:</b>	Duplicate Copy for Public Dissemination.		
<b>Disposition:</b>	TEMPORARY: Transfer upon request to the National Technical Information Service (NTIS).		
<b>DispAuthNo:</b>	N1-059-03-10, item 14c	<b>Date Edited:</b>	7/22/2005
<b>A-06-021-25a</b>	<b>Field Footage File</b>		
	<b>Significant Field Footage.</b>		
<b>Description:</b>	Contains material that may or may not have been used in production. Produced on Betacam SP, SVHS, digibeta tape format.  Material documenting significant people, places, or events.		
<b>Disposition:</b>	PERMANENT: Maintain in current file area for 10 years. Then transfer to NARA in 2-year blocks.		
<b>DispAuthNo:</b>	N1-059-03-10, item 15a	<b>Date Edited:</b>	7/22/2005
<b>A-06-021-25b</b>	<b>Field Footage File</b>		
	<b>Routine Field Footage File.</b>		
<b>Description:</b>	Contains material that may or may not have been used in production. Produced on Betacam SP, SVHS, digibeta tape format.  Material that does not document any significant people, place, or event.		
<b>Disposition:</b>	TEMPORARY: Degauss and recycle tapes when no longer needed.		
<b>DispAuthNo:</b>	N1-059-03-10, item 15b	<b>Date Edited:</b>	7/22/2005
<b>A-06-021-26</b>	<b>Script File</b>		
<b>Description:</b>	Consists of written specifications for video production. Includes such things as setting, action and camera coverage, dialogue, narration and an audio portion that addresses music and sound effects. Also includes script approvals signed by Department of State internal clients.		
<b>Disposition:</b>	TEMPORARY: Destroy video production copy upon completion of project and transfer original script to internal client.		
<b>DispAuthNo:</b>	N1-059-03-10, item 16	<b>Date Edited:</b>	7/22/2005

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#### A-06-021-27      **Equipment Inventory Files**

**Description:** Contains copies of equipment requisitions and related documentation for current inventory.

**Disposition:** TEMPORARY: Destroy 2 years after discontinuance of equipment item, 2 years after stock balance is transferred to new inventory or 2 years after equipment is removed from Department control.

**DispAuthNo:** N1-059-03-10, item 17

**Date Edited:** 7/22/2005

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#### A-06-021-28      **Finding Aids (Index)**

**Description:** Finding aids for identification, retrieval, or use of video master and raw footage records. Contains such information as name of tape, date produced, topic, domestic or overseas, tape format, and name of client.

**Disposition:** PERMANENT: Transfer to NARA with disposition of video master and field footage files.

**DispAuthNo:** N1-059-03-10, item 18

**Date Edited:** 7/22/2005

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#### A-06-021-29      **ART BANK PROGRAM**

##### **Art Bank Program Vendor Files**

**Description:** Contains copies of documents related to the purchase of artwork and framing materials from vendors. Includes purchase orders, bank check/credit receipts for supplies, Art Bank Program vendor orders, shipping and receiving reports, vendor invoices, final credit card statements. Arranged alphabetically by vendor name in fiscal year order.

**Disposition:** TEMPORARY: Cutoff at end of fiscal year. Delete/destroy 5 years after cutoff.

**DispAuthNo:** N1-059-03-10, item 19

**Date Edited:** 7/22/2005

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#### A-06-021-30      **Source File**

**Description:** Contains information about the artwork represented by source including brochures and visuals of art. Used only for reference purposes.

**Disposition:** TEMPORARY: Maintain in current file area until no longer needed for informational purposes and then destroy.

**DispAuthNo:** N1-059-03-10, item 20

**Date Edited:** 6/15/2009

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#### A-06-021-31 Artist Background and Appraisal Files

**Description:** Loose leaf binders containing artist biographies, catalogues, articles, print documents, and other printed information about the art work. Files are provided to prospective clients and are used by art appraisers and Art Bank staff. Arranged alphabetically.

**Disposition:** TEMPORARY: Destroy when superseded by updated information.

**DispAuthNo:** N1-059-03-10, item 21 **Date Edited:** 7/22/2005

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#### A-06-021-32 Total Database (Macintosh)

**Description:** Database operates under Macintosh Filemaker Pro SW. It is used by the Art Bank to manage the acquisition and use of artwork available for bureaus/offices to borrow. Elements include unique registration number, title, artist, date of artwork, print number, physical size, media details, art characteristics, glazing information, documentation type, and acquisition and current market value of artwork.

**Disposition:** TEMPORARY: see items 32a through 32d for specific dispositions.

**DispAuthNo:** N1-059-03-10, item 22 **Date Edited:** 7/22/2005

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#### A-06-021-32a(1) Inputs

**Description:** Documents or forms used to create, update, or modify the records in the database that are required for audit or legal purposes.

**Disposition:** TEMPORARY: File with related records after information has been entered into the system and verified; delete/destroy in accordance with related vendor or source files.

**DispAuthNo:** N1-059-03-10, item 22a(1) **Date Edited:** 7/22/2005

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#### A-06-021-32a(2) Inputs

**Description:** Documents or forms used to create, update, or modify the records in the database and not required for audit or legal purposes.

**Disposition:** TEMPORARY: Delete/destroy after the information has been entered into the database and verified.

**DispAuthNo:** N1-059-03-10, item 22a(2) **Date Edited:** 7/22/2005

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**A-06-021-32b**                      **Database**

**Description:**            Consists of Borrowers Activity File (location history), Condition and Conservation File, Bureaus and Image files. Electronic records are derived from hard copy documents or forms that are subsequently filed in the Vendor File, the Source File, or the Subject Files.

**Disposition:**            TEMPORARY: Retain for duration artwork is owned by GSM. When artwork is disposed, move data to inactive status. Delete when no longer needed for administrative, legal, audit, or other operational purposes, whichever is later.

**DispAuthNo:**            N1-059-03-10, item 22b                      **Date Edited:**        7/22/2005

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**A-06-021-32c(1)(a)**                      **OUTPUTS**

**Fiscal Year Statistical Report.**

**Description:**            Reports. Ad-hoc and scheduled system generated reports related to penalties for loss, the purchase and loan of artwork, borrowers of artwork, amount of financial contribution by components, title and location of art, and work activities.

**Disposition:**            TEMPORARY: Cutoff at end of fiscal year. Delete/destroy 3 years after cutoff.

**DispAuthNo:**            N1-059-03-10, item 22c(1)(a)                      **Date Edited:**        7/25/2005

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**A-06-021-32c(1)(b)**                      **Semi-annual Inventory Report.**

**Description:**            Used by Art Bank staff to conduct twice annual Department-wide inventory of the artworks on exhibit.

**Disposition:**            TEMPORARY: Delete/destroy when superseded by new inventory report or when no longer needed for administrative purposes.

**DispAuthNo:**            N1-059-03-10, item 22c(1)(b)                      **Date Edited:**        7/25/2005

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**A-06-021-32c(2)**                      **Labels**

**Description:**            System generated labels used for inventory and identification purposes.

**Disposition:**            TEMPORARY: Affix label to artwork. Destroy label when artwork is disposed of.

**DispAuthNo:**            N1-059-03-10, item 22c(2)                      **Date Edited:**        7/25/2005

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<b>A-06-021-32d</b>	<b>Documentation</b>
<b>Description:</b>	Documents that provide a narrative description of the electronic system or physical and technical characteristics of the records, including a record layout that describes each field including its name, size, starting or relative position; and a description of the form of the data. Also includes a data dictionary or the equivalent information associated with a database management system., including a description of the relationship between data elements in databases, and any other technical information needed to read or process the records. System documentation may include such items as manuals and software update documentation.
<b>Disposition:</b>	TEMPORARY: Cutoff when the system is superseded and/or replaced. Delete/destroy 2 years after cutoff or when no longer needed for reference, whichever is later.
<b>DispAuthNo:</b>	N1-059-03-10, item 22d
<b>Date Edited:</b>	7/25/2005
<b>A-06-021-37</b>	<b>Electronic Mail and Word Processing System Copies</b>
<b>Description:</b>	Electronic copies of records that are created on electronic mail and word processing systems and used solely to generate a recordkeeping copy of the records covered by the other items in the schedule. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.
<b>Disposition:</b>	TEMPORARY: see items 37a and b for specific disposition.
<b>DispAuthNo:</b>	N1-059-03-10, item 27
<b>Date Edited:</b>	7/26/2005
<b>A-06-021-37a</b>	<b>Electronic Mail and Word Processing System Copies</b>
<b>Description:</b>	Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.
<b>Disposition:</b>	TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.
<b>DispAuthNo:</b>	N1-059-03-10, item 27a
<b>Date Edited:</b>	7/26/2005
<b>A-06-021-37b</b>	<b>Electronic Mail and Word Processing System Copies</b>
<b>Description:</b>	Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.
<b>Disposition:</b>	TEMPORARY: Delete when dissemination, revision, or updating is completed.
<b>DispAuthNo:</b>	N1-059-03-10, item 27b
<b>Date Edited:</b>	7/27/2005

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**A-06-021-39d**      **Parking Permit and Car Pool Records Information System****Description:**      d. System Backups:

Backup tapes maintained for potential system restoration in the event of a system failure or other unintentional loss of data.

**Disposition:**      TEMPORARY. Destroy when second subsequent backup is verified as successful or when no longer needed for system restoration, whichever is later. (Supersedes GRS 24, item 4a[2]).**DispAuthNo:**      GRS 3.2, item 041**Date Edited:**      5/4/2015

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**A-06-021-39e**      **Parking Permit and Car Pool Records Information System****Description:**      e. Documentation:

Data systems specifications, file specifications, codebooks, records layouts, user guides, output specifications, and final reports relating to a master file or data base that has been authorized for destruction by the GRS or a NARA-approved disposition schedule.

**Disposition:**      TEMPORARY. Destroy 5 years after the project/activity/transaction is completed or superseded, or the associated system is terminated, or the associated data is migrated to a successor system. (Supersedes GRS 20, item 11a[1]).**DispAuthNo:**      GRS 3.1, item 051**Date Edited:**      5/4/2015

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**G-8 Summit Planning Organization****A-06-025-01 Executive Director - Program Files**

**Description:** Includes reports, email messages, background material, and correspondence documenting the activities related to the unique, substantive functions for which the SPO is responsible. Arranged by subject.

**Disposition:** TEMPORARY. Cut off at end of the Summit. Retain in office area until completion and publication of after action report and retire to Records Service Center. Delete/destroy 10 years after cut off.

**DispAuthNo:** N1-059-04-01, item 1 **Date Edited:** 4/8/2005

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**A-06-025-02 Executive Director - After-Action Report  
Arranged by function**

**Description:** Report with annexes detailing the activities of each of the Summit Planning Organization functional areas (administration, liaison, communications, accommodations, etc.). The report which is organized by function, documents the activities of the SPO, and serves as a "lessons learned" resource for future summit planning.

**Disposition:** TEMPORARY. Retire to the Records Service Center upon completion of the Summit and publication of the report. Delete/destroy when 10 years old or when superseded by report of the next U.S. hosted Summit, whichever is sooner.

**DispAuthNo:** N1-059-04-01, item 2 **Date Edited:** 4/8/2005

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#### A-06-025-03 Administrative Records Maintained in any Agency Office

**Description:** Executive Director Daily Activity Reports and Function Director Administrative Records.

Records accumulated by individual offices that relate to routine day-to-day administration and management of the office rather than the mission-specific activities for which the office exists. Records include:

- staff locators, unofficial organizational charts, and office seating charts (see Exclusion 1)
- office-level administrative policies and procedures and files related to their development (see Note 1)
- calendars or schedules of daily activities of non-high-level officials (high-level officials are defined in GRS 6.1; this item covers those positions not defined as high-level)
- informal requests and tracking of personnel training, travel, supplies, and equipment, excluding procurement and payment records and forms requesting training (e.g. SF-182)
- internal office activity and workload reports
- studies and analyses of office administrative functions and activities
- non-mission related management reviews and surveys
- minutes of meetings related to administrative activities

Exclusion 1: This item does not apply to recordkeeping copies of organizational charts, functional statements, and related records that document the mission-related organization, staffing, and procedures of the office. Agencies must schedule those records on an agency-specific schedule.

Note 1: This item covers administrative policies and procedures at the office/unit level. GRS 5.7 covers agency-level administrative issuances or directives.

**Disposition:** Temporary. Destroy when business use ceases.

**DispAuthNo:** DAA-GRS-2016-0016-0001 (G                      **Date Edited:** 9/21/2017

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#### A-06-025-04 Deputy Executive Director - Program Files

**Description:** Includes reports, email messages, memoranda, background material, and general correspondence documenting the activities related to the unique, substantive functions for which the SPO is responsible. Topics include such things as Core Week Schedule, non-government organizations, special interest groups, action item follow-up, administration and internal SPO policy, personnel issues, etc. Arranged by subject.

**Disposition:** TEMPORARY: Cut off at end of summit. Retain in office area until completion of after action report. Delete/destroy upon completion and publication of after action report.

**DispAuthNo:** N1-059-04-01, item 4                      **Date Edited:** 4/8/2005

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#### A-06-025-05 Deputy Executive Director - Meeting Minutes

**Description:** File contains email, transcripts, or written copies of minutes, agenda, list of attendees, proposals submitted for consideration, action items and final recommendations of meetings with SPO staff, Interagency Governmental Task Force, and other forums involved in summit planning. Arranged by topic or organization.

**Disposition:** TEMPORARY: Cut off at end of the Summit. Retain in office area until completion of after action report. Delete/destroy upon completion of after action report.

**DispAuthNo:** N1-059-04-01, item 5

**Date Edited:** 4/8/2005

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#### A-06-025-06 General Counsel - Program Files

**Description:** Includes reports, email messages memoranda, background material, and general correspondence documenting the legal advice provided SPO staff relative to the functions for which the SPO is responsible. Topics can include such areas as Host and Legacy Committee liaison, contract reviews, ethics questions, first amendment issues, Privacy Act statement for website, trademark issues related to G-8 logo, and interpretations of laws. Arranged by subject within each SPO function.

**Disposition:** TEMPORARY: Cut off at end of the Summit. Retain in office area until completion of after action report. Delete/destroy upon completion of after action report.

**DispAuthNo:** N1-059-04-01, item 6

**Date Edited:** 4/14/2005

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#### A-06-025-07 Functional Director - Functional Director Files

**Description:** Files contain information about Director and staff officer activities related to domestic and international liaison, operations, communications, events, credentialing, accommodations, information technology, and administration, including liaison with State Bureau of Administration. Includes copies of correspondence, progress reports, publications, drafts of documents, background data and reference materials. Arranged by subject or country within each functional area.

**Disposition:** TEMPORARY: Cut off at conclusion of project or assignment. At end of the Summit screen out documents for inclusion in the appropriate official file. Delete/destroy remainder of file when projects, assignments, and after action report are completed. (ref. N1-059-89-25, item 15)

**DispAuthNo:** N1-059-04-01, item 7

**Date Edited:** 4/8/2005

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<b>A-06-025-09b</b>	<b>Functional Director - G-8 Summit Planning Organization Web Site (<a href="http://www.g8usa.gov/">http://www.g8usa.gov/</a>) Records</b>
<b>Description:</b>	b. g8usa.gov Web site Content Records  Electronic records documenting the content of the g8usa.gov web site. This includes, but will not be limited to personal information on all individuals who have or seek credentials e.g., delegates, media, staff, vendors, etc. who need access to Summit venues (typically those that have designated as NSSE (National Special Security Event) venues). Other information collected includes data about a persons visit to the web site. Any personal information an individual provides in an email message will only be used to respond to the email.
<b>Disposition:</b>	TEMPORARY: Cut off at end of the Summit. Hold records until completion of after action report or superseded by updated information. Retire to Records Service Center upon completion of after action report and delete/destroy 3 years after cut off.
<b>DispAuthNo:</b>	N1-059-04-01, item 9b
<b>Date Edited:</b>	4/8/2005
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<b>A-06-025-09c</b>	<b>Functional Director - G-8 Summit Planning Organization Web Site (<a href="http://www.g8usa.gov/">http://www.g8usa.gov/</a>) Records</b>
<b>Description:</b>	c. g8usa.gov Feedback and Statistical Reports  Electronic records that contain all comments and feedback from web site users. There is also another set of reports, which contain utilization statistics on the web site.
<b>Disposition:</b>	TEMPORARY: Cut off at end of the Summit. Upon completion of after action report retire to Records Service and delete/destroy data 3 years after cut off.
<b>DispAuthNo:</b>	N1-059-04-01, item 9c
<b>Date Edited:</b>	4/8/2005
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<b>A-06-025-09d</b>	<b>Functional Director - G-8 Summit Planning Organization Web Site (<a href="http://www.g8usa.gov/">http://www.g8usa.gov/</a>) Records</b>
<b>Description:</b>	d. g8usa.gov Maintenance and Operations Records  Paper and electronic records documenting g8usa.gov web site maintenance, operations, and program administration.
<b>Disposition:</b>	TEMPORARY: Cut off at end of the Summit. Upon completion of after action report retire to Records Service Center and delete/destroy records 3 years after cut off.
<b>DispAuthNo:</b>	N1-059-04-01, item 9d
<b>Date Edited:</b>	4/8/2005
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#### A-06-025-10 Supervisors' Personnel Files

**Description:** Records on positions, authorizations, pending actions, position descriptions, training records, individual development plans, telework agreements, award recommendations, and records on individual employees not duplicated in or not appropriate for the OPF. These records are sometimes called supervisors' working files, unofficial personnel files (UPFs), and employee work folders or "drop" files.

Exclusion 1: Records that become part of a grievance file, an appeal or discrimination complaint file, a performance-based reduction-in-grade or removal action, or an adverse action. These records are covered under GRS 2.3, Employee Relations Records.

Exclusion 2: Employee medical documents, unless part of employee's initial request for reasonable accommodation. Following approval, the agency's reasonable accommodation decision replaces medical documentation and becomes the record. Reasonable accommodation employee case files are covered under GRS 2.3, Employee Relations Records.

**Disposition:** Temporary. Review annually and destroy superseded documents. Destroy remaining documents 1 year after employee separation or transfer. (Supersedes GRS 1, item 18a and GRS 1, item 18b)

**DispAuthNo:** DAA-GRS-2017-0007-0012 (G      **Date Edited:** 9/1/2017)

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#### A-06-025-11 Time and Attendance Records

**Description:** Sign-in/sign-out records, time cards, leave applications and approvals of all types (annual, sick, family medical, military service, jury duty, leave donations, etc.); overtime, compensatory, and credit time requests and approvals; premium pay authorizations; and other records documenting employees' presence at or absence from work.

Legal citation: 29 U.S.C. 516.5a

**Disposition:** Temporary. Destroy after GAO audit or when 3 years old, whichever is sooner. (Supersedes GRS 2, item 7)

**DispAuthNo:** DAA-GRS-2016-0015-0003 (G      **Date Edited:** 9/11/2017)

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#### A-06-025-13 Budget Preparation Background Records

**Description:** Records held at all other offices. Preliminary budget estimates, justifications, cost statements, narrative statements, rough data, and similar materials from internal agency components (individual offices, divisions, programs, etc.) for use in preparing annual, agency-wide budget requests.

**Disposition:** Temporary. Destroy when 2 years old, but longer retention is authorized if required for business use. (Supersedes GRS 5, item 2)

**DispAuthNo:** DAA-GRS-2015-0006-0006 (G      **Date Edited:** 1/18/2018)

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**A-06-025-14      Functional Director - Financial Plans**

**Description:** Financial plans and related worksheets, reports, and communications.

**Disposition:** TEMPORARY: Delete/destroy 3 years after close of fiscal year in which prepared.

**DispAuthNo:** N1-059-04-01, item 14      **Date Edited:** 7/16/2007

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**A-06-025-15      Functional Director - Appropriation Allotment Files**

**Description:** Allotment records showing status of obligations and allotments under each authorized appropriation.

**Disposition:** TEMPORARY. Destroy 6 years after final payment or cancellation. (Supersedes GRS 7, item 3).

**DispAuthNo:** GRS 1.1, item 010      **Date Edited:** 4/30/2015

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**A-06-025-16      Functional Director - Expenditure Accounting Posting and Control Files**

**Description:** Records such as distribution ledgers, registers of interoffice transfers, expenditure voucher file, liquidation memoranda and other series of posting and control media, subsidiary to the allotment ledgers, and not otherwise provided for in this schedule. Included are related communications, reports, tabulations, and worksheets.

**Disposition:** TEMPORARY. Destroy 6 years after final payment or cancellation. (Supersedes GRS 7, item 4a).

**DispAuthNo:** GRS 1.1, item 010      **Date Edited:** 4/30/2015

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**A-06-025-17      Functional Director - Allotment Reports**

**Description:** Monthly reports of allottees, showing current and cumulative to date transactions as reflected in their distribution ledgers. Included are related communications and worksheets.

**Disposition:** TEMPORARY: Delete/destroy 4 years after close of fiscal year prepared.

**DispAuthNo:** N1-059-04-01, item 17      **Date Edited:** 7/16/2007

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**A-06-025-18      Functional Director - Routine Procurement and Contract Files**

**Description:** Files contain contracts, requisitions, purchase orders, leases, and bond and surety records, including correspondence and related papers pertaining to award, administration, receipt, inspection and payment.

**Disposition:** Temporary. Destroy when business use ceases. (Supersedes GRS 3, item 3c)

**DispAuthNo:** GRS 1.1, item 011      **Date Edited:** 4/30/2015

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**A-06-025-20      Functional Director - International Merchant Purchase Authorization Card (I.M.P.A.C.) Files**

**Description:** Includes copies of monthly credit card statements, receipts, and related documentation. Note: Signed original of Monthly Credit Card Statement is maintained by the Office of Resource Management for 6 years and 3 months. Arranged by fiscal year.

**Disposition:** TEMPORARY: Cut off at end of the Summit. Retire to Records Service Center. Delete/destroy after GAO audit or when 3 years old, whichever is sooner.

**DispAuthNo:** N1-059-04-01, item 20

**Date Edited:** 7/16/2007

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**A-06-025-21      Functional Director - Travel Files**

**Description:** Includes records relating to routine and operational aspects of travel and visits by other than prominent individuals and congressmen. Included are travel orders, per diem vouchers, transportation requests, hotel reservations, and all supporting documents.

**Disposition:** Temporary. Destroy when 3 years old, but longer retention is authorized if needed for business use. (Supersedes GRS 9, item 4a)

**DispAuthNo:** GRS 1.1, Item 001

**Date Edited:** 3/13/2017

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**A-06-025-22      Functional Director - Word Processing and E-Mail Files**

**Description:** Electronic copies of records, including but not limited to letters, messages, memoranda, reports, handbooks, directives, and manuals, that are created on electronic mail and word processing systems and used solely to generate a recordkeeping copy of the records covered by the other items in this section. Also includes electronic copies of records created on electronic mail and word processing systems that are maintained for updating, revision, or dissemination.

**Disposition:** See items 22a and b.

**DispAuthNo:** GRS 23, item 10

**Date Edited:** 4/8/2005

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**A-06-025-22a      Functional Director - Word Processing and E-Mail Files**

**Description:** Copies that have no further administrative value after the recordkeeping copy is made. Includes copies maintained by individuals in personal files, personal electronic mail directories, or other personal directories on hard disk or network drives, and copies on shared network drives that are used only to produce the recordkeeping copy.

**Disposition:** TEMPORARY: Delete within 180 days after the recordkeeping copy has been produced.

**DispAuthNo:** GRS 23, item 10

**Date Edited:** 4/8/2005

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**A-06-025-22b**                      **Functional Director - Word Processing and E-Mail Files**

**Description:**            Copies used for dissemination, revision, or updating that are maintained in addition to the recordkeeping copy.

**Disposition:**            TEMPORARY: Delete when dissemination, revision, or updating is completed.

**DispAuthNo:**            GRS 23, item 10

**Date Edited:**            4/8/2005

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#### Office of the Executive Director

**A-06-026-01**      **BNet Intranet Website**

**Description:** Website content and all related web management and operations records. Web content consists of information about the BNet TV schedules, search functionality of videos on demand, downloads of video programs, and information on using the video systems.

**Disposition:** Temporary. Delete/destroy when superseded, obsolete, or no longer needed.

**DispAuthNo:** N1-059-10-21, item 1

**Date Edited:** 2/4/2011

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**A-06-026-02**      **BNet Weekly Program**

**Description:** Consists of a content management system that identifies, indexes, and schedules the video programs broadcast on BNet Live and on BNet TV.

**Disposition:** Temporary. Destroy when 2 years old or when no longer needed, whichever is later.

**DispAuthNo:** N1-059-10-21, item 2

**Date Edited:** 2/4/2011

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**A-06-026-03**      **BNet Video Clip Collection**

**Description:** Consists of BNet video clip programs that were shown on-air or on-line through the BNet broadcasting systems. Video programs come from a variety of sources, including C-SPAN video feeds of Congressional events and hearings, bureaus and posts videos of meetings and presentations, and video programs from the Department Public Affairs office.

**Disposition:** Temporary. Destroy when 2 years old or when no longer needed, whichever is later.

**DispAuthNo:** N1-059-10-21, item 3

**Date Edited:** 2/4/2011

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**A-06-026-04**      **EZ Virtual Time Card (EZ-VTC)**

**Description:** The Virtual Time Card application allows direct-hire government employees to submit their timecards for approval, first to their supervisor and then to their timekeeper(s) for entry into TATEL, without printing paper forms or leaving their desk. The application is scalable, requires no special license, and produces automatic reminders and metric reports as needed. Employees requesting leave (sick leave, annual leave, or any other type of leave requiring prior approval by their supervisor) can use the Department's eForms program to fill out, sign, and submit form OPM-0071 electronically to their supervisor. Once the leave slip has been electronically signed by their supervisor, the employee may then save the electronically signed form and attach it to their virtual timecard submission.

**Disposition:** NA

**DispAuthNo:** N/A

**Date Edited:** 3/9/2012

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<b>A-06-026-04a</b>	<b>Time and Attendance Records</b>
<b>Description:</b>	Sign-in/sign-out records, time cards (i.e. OF 1130), leave applications and approvals of all types (annual, sick, family medical, military service, jury duty, leave donations, etc.); overtime, compensatory, and credit time requests and approvals; premium pay authorizations; and other records documenting employees' presence at or absence from work.  Legal citation: 29 U.S.C. 516.5a
<b>Disposition:</b>	Temporary. Destroy after GAO audit or when 3 years old, whichever is sooner. (Supersedes GRS 2, item 7)
<b>DispAuthNo:</b>	DAA-GRS-2016-0015-0003 (G) <b>Date Edited:</b> 9/11/2017
<b>A-06-026-04b</b>	<b>Intermediary Records</b>
<b>Description:</b>	EZ Virtual Time Card (EZ-VTC) including inputs generated from data entry from individual employees, scanned images and electronic documentation. Also includes adhoc reports for reference purposes or to meet day-to-day business needs.
<b>Disposition:</b>	Temporary. Destroy upon verification of successful creation of the final document or file, or when no longer needed for business use, whichever is later. (Supersedes GRS 4.3 item 010; GRS 4.3, item 011; GRS 4.3, item 012; GRS 4.3, item 020; GRS 4.3, item 030; and GRS 4.3, item 031)
<b>DispAuthNo:</b>	DAA-GRS-2017-0003-0002 (G) <b>Date Edited:</b> 9/26/2017
<b>A-06-026-04d</b>	<b>EZ Virtual Time Card (EZ-VTC)</b>
<b>Description:</b>	d. System Backup  Data file information is simultaneously mirrored on four 4node SQL Servers (clustered) and are backup daily within the DoS Enterprise Server Operations Center (ESOC).
<b>Disposition:</b>	Temporary. Destroy immediately after the identical records have been deleted or replaced by a subsequent backup file, but longer retention is authorized if required for business use. (Supersedes GRS 20, item 8b)
<b>DispAuthNo:</b>	GRS 3.2, Item 051 <b>Date Edited:</b> 3/9/2017

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**A-06-026-04e**      **EZ Virtual Time Card (EZ-VTC)**

**Description:** e. System Documentation

Data systems specifications, file specifications, codebooks, record layouts, user guides, output specifications and final reports relating to master file, database or other electronic records.

**Disposition:** Temporary. Destroy or delete upon authorized deletion of the related electronic records or upon the destruction of the output of the system if the output is needed to protect legal rights, whichever is later.

**DispAuthNo:** GRS 10, item 11a(1)

**Date Edited:** 3/9/2012

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#### Deputy Assistant Secretary for Global Information Services

**A-06-027-01**      **DAS Program Files**

**Description:** Consists of correspondence, memorandums, reports, project plans, position papers, briefing materials, and other records received or sent by the Deputy Assistant Secretary that pertain to the formulation and development of policy positions, set precedent, or reflect significant changes in organization and management of the Department global information services programs. Records document the management of information services and the planning and development of activities in the areas of directives and forms management, publishing services, Freedom of Information and Privacy Acts, records management, document classification, and library services.

**Disposition:** PERMANENT. Cut off file at the end of the incumbent tenure and retire to the RSC. Transfer to the National Archives 25 years after cutoff.

**DispAuthNo:** N1-059-10-22, item 1

**Date Edited:** 4/8/2011

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**A-06-027-02**      **DAS Administrative Files**

**Description:** Consists of correspondence, memorandums, emails, reports, spreadsheets, workload reports, presentations and reference and background materials that relate to the management of the office but do not set precedent or reflect policy decisions. (For administrative files common to all offices, see Chapter 3.)

**Disposition:** Temporary. Cut off file at the end of the incumbent tenure. Destroy 3 years after cutoff or when no longer needed, whichever is later.

**DispAuthNo:** N1-059-10-22, item 2

**Date Edited:** 4/8/2011

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#### Office of Information Programs and Services (A/GIS/IPS) - Front Office

**A-06-028-01 Student Employee Correspondence**

**Description:** Consists of general correspondence to include, but not limited to, requests for personal and academic documentation, students' work plans, students' schedules, instructional and guidance emails for current students, intake processes and program updates.

**Disposition:** Temporary. Destroy 1 year after end of student employment.

**DispAuthNo:** DAA-0059-2012-0005-0001      **Date Edited:** 2/13/2013

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**A-06-028-02 Student Recruitment Files**

**Description:** Contains correspondence to Universities; candidates rankings and statistics; resumes; data call requests; interview instructions; posted job vacancies announcements; meeting notes; correspondence with new recruits; letters to Supervisors for new recruits; progress and issue reports; as well as program status reports.

**Disposition:** Temporary. Destroy when 3 years old or when no longer needed, whichever is later.

**DispAuthNo:** DAA-0059-2012-0005-0002      **Date Edited:** 2/13/2013

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**A-06-028-03 Standard Operations Procedures -SOPs**

**Description:** Consists of established standard operational procedures and guidance for conducting day-to-day official business within the office. Annually updated and kept in hard copy.

**Disposition:** Temporary. Cut off at end of calendar year and destroy when superseded.

**DispAuthNo:** DAA-0059-2012-0005-0003      **Date Edited:** 2/13/2013

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**A-06-028-04 Staff Assistants' Files**

**Description:** Subject Files. Memorandums, reports, and taskers regarding IPS operations, such as those originating within various IPS divisions and requiring the IPS Director's clearance, and the attendant notes, logs, and excel charts used by the IPS Front Office to monitor and organize those items.

**Disposition:** Temporary. Destroy when no longer needed for operational purposes.

**DispAuthNo:** DAA-0059-2012-0005-0006      **Date Edited:** 2/13/2013

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#### **A-06-028-05 Tracking and Control System Records**

**Description:** Logs, registers, excel spreadsheets and other records used to control and document student employment programs, (i.e.; the Student Career Experience Program-SCEP and PATHWAYS). Included are statistical data reports, graphs, logs, recommendations and referrals and other similar records used solely to control work flow.

**Disposition:** Temporary. Destroy when 3 years old or when no longer needed, whichever is sooner.

**DispAuthNo:** DAA-0059-2012-0005-0004                      **Date Edited:** 2/13/2013

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#### **A-06-028-06 Policy and Procedures Files**

**Description:** Material regarding the development and implementation of internal organizational policies and procedures, such as materials pertaining to the realignment of organizational IT resources, and Memorandums of Agreement (MOAs) and Memorandums of Understanding (MOUs) which establish working arrangements involving IPS and other offices, divisions, bureaus, or agencies.

**Disposition:** Temporary. Cutoff when superseded, updated, or no longer in effect. Destroy 10 years after cutoff.

**DispAuthNo:** DAA-0059-2012-0005-0005                      **Date Edited:** 2/13/2013

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**A-06-028-07a**      **Job Vacancy Case Files**

**Description:**      Records of standing register competitive files for multiple positions filled over a period of time.

Case files an agency creates when posting and filling competitive job vacancies. Also known as case examining, competitive examination, or merit case files.

Includes:

- request for lists of eligible candidates
- job announcement
- examination announcement
- job analysis, assessment criteria, and crediting plan
- basis for certification
- applications, resumes, supplemental forms, other attachments
- list of eligible candidates or applicants screened, ranking or ratings assigned, and basis for certification
- certificates, registers or lists of eligible candidates issued to selecting officials
- job-related test records
- annotated certificates of eligible candidates returned by selecting officials
- job offers
- records of job offer being accepted or declined
- correspondence/documentation of announcement or recruiting operation

Legal citation: 5 CFR 335.103

**Disposition:**      Temporary. Destroy 2 years after termination of register. (Supersedes GRS 1, item 4a)

**DispAuthNo:**      DAA-GRS-2014-0002-0007 (G)      **Date Edited:**      9/5/2017

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**A-06-028-07b**      **Job Application Packages**

**Description:** Application packages for competitive positions, in USAJobs or its successors, and other systems, whether electronic or analog. Includes:

- application
- resume
- supplemental forms
- other attachments

Includes declined offers for temporary or excepted appointment, when a name is received from certificate of eligibles; and all others.

Note: This item is only for copies of materials submitted to and maintained in systems that receive job applications. Copies of these records used to fill job vacancies are covered under job vacancy case files (Items 050 and 051).

**Disposition:** Temporary. Destroy 1 year after date of submission. (Supersedes GRS 1, item 4b(1); GRS 1, item 4b(2); and GRS 1, item 4b(3))

**DispAuthNo:** DAA-GRS-2014-0002-0011 (G      **Date Edited:** 9/7/2017

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**A-06-028-09**      **Position Descriptions**

**Description:** Official record copy of position description.

Copy held at Human Resources office.

Records relating to developing, editing, classifying, and evaluating position descriptions, including information on title, series, grade, duties, and responsibilities.

**Disposition:** Temporary. Destroy 2 years after position is abolished or description is superseded, but longer retention is authorized if required for business use. (Supersedes GRS 1, item 7b)

**DispAuthNo:** DAA-GRS-2014-0002-0002 (G      **Date Edited:** 9/11/2017

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#### A-06-028-10 Employee Incentive Award Records

**Description:** Agency awards files, including recommendations, approved nominations, correspondence, and reports about agency-sponsored cash and noncash awards (such as lump-sum cash awards, honorary awards, informal recognition awards, cost savings awards, and time off awards). Also, includes correspondence about awards from other Federal agencies or non-Federal organizations and to former employees.

Exclusion: Records of Department-level awards require agency-specific schedules.

**Disposition:** Temporary. Destroy when 2 years old or 2 years after award is approved or disapproved, whichever is later, but longer retention is authorized if required for business use. (Supersedes GRS 1, item 12a(1))

**DispAuthNo:** DAA-GRS-2017-0007-0003 (G      **Date Edited:** 9/1/2017

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#### A-06-028-11 Supervisors' Personnel Files

**Description:** Records on positions, authorizations, pending actions, position descriptions, training records, individual development plans, telework agreements, award recommendations, and records on individual employees not duplicated in or not appropriate for the OPF. These records are sometimes called supervisors' working files, unofficial personnel files (UPFs), and employee work folders or "drop" files.

Exclusion 1: Records that become part of a grievance file, an appeal or discrimination complaint file, a performance-based reduction-in-grade or removal action, or an adverse action. These records are covered under GRS 2.3, Employee Relations Records.

Exclusion 2: Employee medical documents, unless part of employee's initial request for reasonable accommodation. Following approval, the agency's reasonable accommodation decision replaces medical documentation and becomes the record. Reasonable accommodation employee case files are covered under GRS 2.3, Employee Relations Records.

**Disposition:** Temporary. Review annually and destroy superseded documents. Destroy remaining documents 1 year after employee separation or transfer. (Supersedes GRS 1, item 18a and GRS 1, item 18b)

**DispAuthNo:** DAA-GRS-2017-0007-0012 (G      **Date Edited:** 9/1/2017

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#### A-06-028-12      **Transitory Records**

**Description:** Records required only for a short time (generally less than 180 days) and that are not required to meet legal or fiscal obligations, or to initiate, sustain, evaluate, or provide evidence of decision-making. Records include, but are not limited to:

- messages coordinating schedules, appointments, and events
- transmittal documents such as e-mail, letters, cover memos, and facsimile cover sheets that do not provide evidence of approval, concurrence, or decision-making, or include substantive comments
- received copies of circulated internal information such as agency instructions, notifications, circulars, newsletters, and email blasts to employees
- messages received from agency distribution lists or listservs
- “to-do” or task lists and assignments

**Disposition:** Temporary. Destroy when no longer needed for business use, or according to agency predetermined time period or business rule. (Supersedes GRS 23, item 6a; GRS 23, item 6b; and GRS 23, item 7)

**DispAuthNo:** DAA-GRS-2017-0003-0001 (G)      **Date Edited:** 9/25/2017

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#### A-06-028-13      **Time and Attendance Records**

**Description:** Sign-in/sign-out records, time cards, leave applications and approvals of all types (annual, sick, family medical, military service, jury duty, leave donations, etc.); overtime, compensatory, and credit time requests and approvals; premium pay authorizations; and other records documenting employees' presence at or absence from work.

Legal citation: 29 U.S.C. 516.5a

**Disposition:** Temporary. Destroy after GAO audit or when 3 years old, whichever is sooner. (Supersedes GRS 2, item 7)

**DispAuthNo:** DAA-GRS-2016-0015-0003 (G)      **Date Edited:** 9/11/2017

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#### A-06-028-14 Administrative Records Maintained in any Agency Office

- Description:** Records accumulated by individual offices that relate to routine day-to-day administration and management of the office rather than the mission-specific activities for which the office exists. Records include:
- staff locators, unofficial organizational charts, and office seating charts (see Exclusion 1)
  - office-level administrative policies and procedures and files related to their development (see Note 1)
  - calendars or schedules of daily activities of non-high-level officials (high-level officials are defined in GRS 6.1; this item covers those positions not defined as high-level)
  - informal requests and tracking of personnel training, travel, supplies, and equipment, excluding procurement and payment records and forms requesting training (e.g. SF-182)
  - internal office activity and workload reports
  - studies and analyses of office administrative functions and activities
  - non-mission related management reviews and surveys
  - minutes of meetings related to administrative activities

Exclusion 1: This item does not apply to recordkeeping copies of organizational charts, functional statements, and related records that document the mission-related organization, staffing, and procedures of the office. Agencies must schedule those records on an agency-specific schedule.

Note 1: This item covers administrative policies and procedures at the office/unit level. GRS 5.7 covers agency-level administrative issuances or directives.

**Disposition:** Temporary. Destroy when business use ceases.

**DispAuthNo:** DAA-GRS-2016-0016-0001 (G      **Date Edited:** 9/21/2017

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