

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1000	<p><u>ORGANIZATION, AUTHORITIES, AND FUNCTIONS</u>: Use for all common use internal management files, including functions performed outside the filing office. May include correspondence or material on the broad aspects of assigned functions, e.g., personnel, budget, & accounting which are filed as separate entities under their appropriate categories.</p> <p>FILE chronologically by subject.</p>	Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
1000-2-1	<p><u>Program Reports</u> a. <u>State Extension Service Reports</u> submitted by States, Narrative Accomplishment Reports, end of year reports.</p> <p>FILE records are arranged alphabetically by State, thereunder chronologically.</p> <p>b. <u>Expanded Food & Nutrition Education Program (EFNEP) Reports</u> summarizing data submitted by County Home Economists regarding ages, education, welfare status, income, diet, etc. of the families in the EFNEP program. Files consist of source documents submitted by counties, Fact Sheets & Statistical readable records.</p> <p>(1) Source documents - Report of Families, aides, 4-H youth, & volunteers</p> <p>(2) Magnetic tape or diskettes containing data & source documents:</p> <p>(3) Printouts</p>	<p>PERMANENT</p> <p>Cut off file at end of 4-yr. cycle. Transfer to NARA in 4-yr. blocks when most recent records are 20 yrs. old.</p> <p>Destroy when 2 yrs. old.</p> <p>Destroy when 10 yrs. old.</p> <p>Destroy when no longer</p>	<p>when 1 yr. after cut off.</p> <p>N/A</p> <p>N/A</p> <p>N/A</p>	<p>Destroy when 3 yrs. old or when no longer needed.</p> <p>N/A</p> <p>N/A</p>	N1-33-89-1

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(1)	(2)	(3)	(4)	(5)	(6)
1000-2-2	(4) Fact sheet & statistical summary prepared. FILE chronologically. c. 4-H Annual Report, State Cooperative Extension Service Annual 4-H Youth Development Report (ES-237) including D.C., P.R., V.I. and Guam.	needed. PERMANENT Transfer to NARA when 10 yrs. old.	when 10 yrs. old.	N/A	
	(1) Source Documents (ES-237):	Destroy when 2 yrs. old.	N/A	N/A	
	(2) Printouts	Destroy when 10 yrs. old.	N/A	N/A	
	(3) Magnetic tape or diskettes	Destroy when 10 yrs. old	N/A	N/A	
	(4) Printed Report FILE chronologically.	PERMANENT Transfer to WNRC when 2 yrs. old. Transfer to NARA when 20 yrs. old, in 10- yr. blocks.	when 2 yrs. old.		
	<u>Special Reports, Studies & Surveys and Supporting Schedules & Questionnaires</u> a. Final reports on special studies, surveys & inspections of operations, management, & systems. Requests for such activity may come from Congress, government coordinating agencies, USDA, & Cooperative Extension Offices. FILE alphabetically by title of report, study, or survey.	PERMANENT Transfer to WNRC when 3 yrs. old. Transfer to NARA when 20 yrs. old, in 10- yr. blocks.	when 3 yrs. old.	Destroy when no longer needed for current activity.	
	b. Schedules & Questionnaires. One sample of each schedule or questionnaire.	PERMANENT Transfer to WNRC when 3	when 3 yrs.	Destroy when no longer needed for	

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1000-2-3	<p>FILE alphabetically by title of report, study, or survey.</p> <p>c. Background documents. Records created or collected in carrying out special studies, including notes, working papers, listings sheets, preliminary or interim report, or reference information.</p> <p>FILE alphabetically by title or report, study or survey it supports.</p> <p>d. Electronic components</p> <p><u>Program Reports</u> Not covered elsewhere in this Schedule, which relates to <u>routine</u> program activities & functions, not appropriate for filing in project files.</p>	<p>yrs. old. Transfer to NARA when 20 yrs. old in 10-yr. blocks.</p> <p>Destroy when no longer needed for current activity.</p> <p>Disposition pending</p> <p>Destroy when 5 yrs. old.</p>	<p>old.</p> <p>N/A</p>	<p>current activity.</p> <p>Destroy when 5 yrs. old</p>	
1000-2-4	<p>FILE chronologically.</p> <p><u>Administrative Reports</u> Not covered elsewhere in this Schedule, which relates to routine administrative activities & functions & have short-term significance, such as routine Activity Reports & trip reports.</p> <p>FILE chronologically.</p>	<p>Destroy when 3 yrs. old.</p>	<p>N/A</p>	<p>Destroy when 3 yrs. old.</p>	
1000-3	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE case file alphabetically by title of project.</p>	<p>Destroy 1 yr. after the yr. in which the project is closed.</p>	<p>N/A</p>	<p>Destroy when no longer needed.</p>	GRS-16-5

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(1)	(2)	(3)	(4)	(5)	(6)
1000-3-1	<p><u>Plans of Work</u> State Cooperative Extension Service Plans of Work</p> <p>FILE records are arranged alphabetically by state, thereunder chronologically.</p>	<p>PERMANENT Cut off file at end of 4-yr. cycle. Transfer to NARA in 4-yr. blocks when most recent records are 20 yrs. old.</p>	<p>when 1 yr. after cutoff.</p>	<p>Destroy when 3 yrs. old or when no longer needed.</p>	<p>N1-33-89-1</p>
1000-4	<p><u>Schedules of Daily Activities</u> Use of calendars, appointment books, schedules, logs, dairies & other records documenting meetings, appointments, telephone calls, trips, visits, & other activities.</p> <p>a. Records created by other than high- level Federal employees, the substance of which has not been incorporated into official files.</p> <p>FILE by origin in chronological sequence.</p> <p>b. Routine material containing <u>no</u> substantive information regarding the daily activities of other than high-level officials; records of all Federal employees containing substantive information, the substance of which has been incorporated into official files; and/or personal records of all Federal employee relating to non- official activities.</p> <p>FILE by subject in chronological sequence.</p>	<p>Destroy when 2 yrs. old.</p> <p>Destroy when no longer needed.</p>	<p>N/A</p> <p>N/A</p>	<p>Destroy when 2 yrs. old.</p> <p>Destroy when no longer needed.</p>	<p>GRS-23-5a</p> <p>GRS-23-5b</p>
1000-4-1	<p><u>Minutes, Reports, and Proceedings.</u> (1) <u>Technical Meetings.</u> Significant meetings attended by ES staff.</p> <p>(2) <u>Professional Societies,</u> of which ES</p>	<p>Destroy when no longer needed.</p> <p>Members</p>	<p>N/A</p> <p>N/A</p>	<p>Destroy when no longer needed</p> <p>Destroy when 3</p>	

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1010	<p>personnel are members & are permitted to attend meetings on official time, such as National Cattlemen's Assoc., National Council on Aging, American Home Economics Assoc., National Agricultural Communicators in Education, American Institute of Cooperation, National 4-H Council, etc. Files include correspondence, reports, agendas, minutes of meetings & related records.</p> <p>(3) <u>Staff Meetings</u> relating to administrative or program activities having short-term significance.</p> <p>(4) Other meeting records of temporary value, such as meeting arrangements, accommodations.</p> <p>FILE by subject in chronological sequence.</p> <p><u>Organization</u> Use for material relating to organizational analysis & planning or changes in organization functions; documents relating to overall functions and missions; & copies of organizational & functional statements, manuals, & charts. Also includes materials pertaining to the number of positions & grade levels/series required to perform program missions.</p> <p>FILE alphabetically by major & minor subdivisions.</p>	<p>destroy when 5 yrs. old.</p> <p>Destroy when 3 yrs. old.</p> <p>Destroy when 3 yrs. old.</p> <p>PERMANENT Transfer to NARA in 5 yrs. blocks when 20 yrs. old.</p>	<p>N/A</p> <p>N/A</p> <p>when 5 yrs. old.</p>	<p>yrs. old or sooner if no longer needed for current activities.</p> <p>Destroy when S/O.</p>	
1011	<p><u>Principles of Organization & Planning</u> Use for material pertaining to planning, analysis, development of approved organizational units and operation, maintenance and improvement of same.</p> <p>FILE by subject.</p>	<p>CMS Destroy when S/O.</p>	<p>N/A</p>	<p>Destroy when S/O.</p>	

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1013	<u>Manpower Planning</u> Use for material pertaining to the manpower needed to accomplish tasks. FILE by subject.	CMS Destroy when S/O.	N/A	Destroy when S/O.	
1020	<u>Statements of Missions and Functions</u> Use for materials pertaining to the missions and functions statements. FILE by subject.	OA Destroy when S/O.	N/A	Destroy when S/O.	
1030	<u>Delegation of Authority</u> Use of material on delegations of authority to identified positions or persons, and temporary or limited delegations to positions or persons. FILE chronologically by major and minor subdivisions.	Destroy when S/O.	N/A	Destroy when S/O.	
1040	<u>Committees and Boards</u> Use for official material documenting the accomplishment of official internal committees, boards, task forces and work groups. FILE chronologically by subject.	Destroy 2 yrs. after termination of committee.	N/A	Destroy when 1 yr. old.	GRS-16-8a
1041	<u>Committee Management</u> Use for material pertaining to the continued monitoring of committee activities. FILE by committee title.	Destroy when 3 yrs. old or when no longer needed for reference.	N/A	Destroy when 3 yrs. old or when no longer needed for reference.	
1041-1	<u>Interagency or International Committees or Task Forces</u> Use for agendas, minutes, final reports and recommendations from inter/intra agency committees or task forces chaired by top level employees.	PERMANENT Transfer to WNRC when 5 yrs. old. Transfer to NARA when 20	when 5 yrs. old.	Destroy when 3 yrs. old when no longer needed for reference.	

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1041-1-2	<p>FILE chronologically by committee.</p> <p><u>Financial Records</u> Showing disposition of funds to ES-sponsored advisory committees & interagency committees, & expenses incurred by the committee, which may be inspected or audited by the Department, the Comptroller General, or authorized representative.</p>	<p>yrs. old.</p> <p>Destroy when 7 yrs. old.</p>	N/A	<p>Destroy when 3 yrs. old or when no longer needed for reference.</p>	
1041-2	<p>FILE by chronological sequence.</p> <p><u>Administrator, Assoc. Administrator, Deputy Administrators, Div. Directors.</u> Use for agendas, minutes, final reports, and supportive records relating to substantive functions of the agency.</p>	<p>Destroy when 3 yrs. old or when no longer needed for reference.</p>	N/A	<p>Destroy when 1 yr. old.</p>	GRS-16-8b(1)
1041-2-1	<p>FILE in chronological sequence.</p> <p><u>Extension Committee on Organization and Policy of the Association of Land-Grant Colleges & Universities (ECOP).</u> a. ECOP is an official body to which matters of policy of general concern to Extension are referred. These matters are considered & recommendations made to the States. Files consist of proceedings relating to substantive Extension functions, & are arranged in date order in bound volumes. b. Original minutes, agendas, reports and other documents relevant to ECOP. FILE in date order.</p>	<p>PERMANENT Transfer bound copies to NARA in 5-yr. blocks.</p> <p>PERMANENT All pre-1980 records to National Archives immediately. Transfer to WNRC in 5-yr. blocks when 10 yrs. old.</p>	<p>when 5 yrs. old.</p> <p>when 5 yrs. old.</p>	<p>Destroy when no longer needed for current activities or when 3 yrs. old whichever is sooner.</p> <p>Destroy when no longer needed for current activities or when 3 yrs. old whichever is sooner.</p>	

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1041-3	<u>Units, Divisions, and Branches</u> Use for internal staff meeting minutes and supportive records below the Director's level. FILE in chronological sequence.	Transfer to NARA in 5-yr. blocks when 20 yrs. old. Destroy when 3 yrs. old or when no longer needed for reference.	N/A	Destroy when 1 yr. old.	GRS-16-8b(1)
1044	<u>Other Committees and Boards</u> Use for material pertaining to the establishment of other committees and boards. FILE by committee and/or board title.	Destroy 2 yrs. after termination of committee.	N/A	Destroy 2 yrs. after termination of committee.	GRS-16-8a
1050	<u>Intradepartmental Relations</u> Use for material involving issues of concern between USDA agencies. NOTE: For Formal Agreements & Memoranda of Understanding see 1314. FILE by agency and location.	Destroy when no longer needed for reference.	N/A	Destroy when issues have been resolved.	
1100	<u>MANAGEMENT IMPROVEMENT</u> Use for material of a general nature which pertains to the evaluation and constant effort to improve the effectiveness of approved programs and the efficiency of their operations which are not described elsewhere in this category. FILE by program title.	Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
1100-2	<u>Operation Costs</u> Use for records of current operating costs & relationship of costs to function and performance. Includes cost reduction and improved effectiveness in operation.	Destroy when 3 yrs. old.	N/A	Destroy when 3 yrs. old.	

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1100-3	FILE by FY in chronological sequence. <u>Reports</u> Use for reports pertaining to management improvements.	CMS Destroy when 3 yrs. old.	N/A	Destroy when 3 yrs. old.	GRS-16-5
1100-4	FILE by agency and subject. <u>Project Control</u> Use for memoranda, reports, & other records documenting assignments, progress & completion of projects.	Destroy 1 yr. after the year in which the project is closed.	N/A	Destroy when no longer needed.	
1110	FILE Case file alphabetically by title of project. <u>Management Policies and Procedures</u> Use for material pertaining to the policies & procedures developed by management to carry out the requirements of programs.	CMS or OA Destroy when no longer needed for reference.	N/A	Destroy when no longer needed.	
1130	FILE by subject. <u>Management Studies and Analyses</u> Use for intra/inter agency management improvement studies & analyses.	CMS/MSB Destroy when no longer needed for reference.	N/A	Destroy when no longer needed.	
1140	FILE by agency and subject. <u>Management Improvement Programs</u> Use for material pertaining to specific management improvement programs.	CMS/PMSD Destroy when no longer needed for reference.	N/A	Destroy when no longer needed.	
1200	FILE by subject. <u>PROGRAM PLANNING AND EVALUATION</u> Use for material pertaining to projected program planning, implementation, and monitoring of operations, plans & goals.	Destroy when 3 yrs. old.	N/A	Destroy when no longer needed.	
	FILE alphabetically by major & minor				

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1200-3	<p>subdivisions.</p> <p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects. Includes weekly activity reports.</p> <p>FILE Case file alphabetically by title of project.</p>	Destroy 1 yr. after year in which the project is closed.	N/A	Destroy when no longer needed.	GRS-16-5
1210	<p><u>Program Goals and Objectives</u> Use for material pertaining to the program goals & objectives set forth to accomplish a particular goal.</p> <p>FILE by position number.</p>	Destroy when no longer needed for reference.	N/A	N/A	
1230	<p><u>Program Review and Evaluation</u> Use for material pertaining to criteria used to evaluate programs & their results.</p> <p>FILE by subject in chronological sequence.</p>	Destroy when no longer needed for reference.	N/A	N/A	
1300	<p><u>EXTERNAL RELATIONS</u> a. Correspondence Files of the Administrator, Associate Administrator, Deputy Administrators, Director & Program Leaders of the Extension Service. Files are arranged alphabetically according to the Extension Service File Classification Guide. Correspondence, memoranda, reports, & related material that document the functions & activities of the Extension Service. Files include material pertaining to program planning & other activities of a precedent-setting, policy forming nature concerning the administration & direction of educational programs in agriculture, home economics & related subjects; cooperation which States & Land Grant Universities, & other matters of</p>	<p>PERMANENT Transfer to WNRC when 3 yrs. old. Transfer to NARA in 5-yr. block when the records in the block are all at least 10 yrs. old.</p>	when 3 yrs. old.	Destroy when 3 yrs. old	

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(1)	(2)	(3)	(4)	(5)	(6)
1300-2	<p>significance in Extension Service.</p> <p>b. Administrative Files. Correspondence reports, and related material pertaining to housekeeping activities of the Extension Service, such as personnel, budget, accounting, property, travel and procurement.</p> <p>FILE by origin, series number or in chronological sequence.</p> <p><u>Legislative Proposals</u> Use for comments and other material on legislative proposals.</p> <p>FILE chronologically by House and Senate.</p>	<p>Destroy when 15 yrs. old.</p> <p>Destroy after 3 yrs. old.</p>	<p>N/A</p> <p>N/A</p>	<p>Destroy when 6 yrs. old.</p> <p>Destroy after 1 yr. old.</p>	
1300-3	<p><u>Public Relations Correspondence</u> Use for general correspondence from the public reflecting individual opinions pertaining to general programs of the Agency not involving any administrative action beyond the preparation of a form reply.</p> <p>NOTE: Records from farm organizations & other groups are not included in this item since such opinions are constantly referred to by the Dept. in the formulation of agricultural programs & policies. For these records, see 1300.</p> <p>FILE by control number and name.</p>	<p>OA Destroy after 5 yrs.</p>	<p>N/A</p>	<p>Destroy after 1 yr.</p>	
1300-6	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE Case file alphabetically by title of</p>	<p>Destroy 1 yr. after the year in which the project is closed.</p>	<p>N/A</p>	<p>Destroy when no longer needed.</p>	<p>GRS-16-5</p>

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1310	<p>project.</p> <p><u>Executive Branch Relations</u> Use for material pertaining to routine Extension Service relations with other executive branch agencies.</p> <p>FILE by subject in chronological sequence.</p>	Destroy when 5 yrs. old	N/A	N/A	
1311	<p><u>White House & Executive Office Relations</u> Use for material pertaining to routine Extension Service relations with the White House or the Executive Office.</p> <p>FILE by subject in chronological sequence.</p>	Destroy when 5 yrs. old.	N/A	N/A	
1312	<p><u>Interdepartmental Relations</u> Use for material pertaining to routine relations between Extension Service & USDA agencies and staff offices.</p> <p>FILE by subject in chronological sequence.</p>	Destroy when no longer needed.	N/A	N/A	
1314	<p><u>Memoranda of Understanding</u> a. Use for the original documents defining the basis for joint action by the U.S. Department of Agriculture and the Land Grant Universities as provided in the Smith-Lever Act of May 8, 1914, on subjects relating to agriculture, home economics, & other related subjects. Includes memoranda of understanding, amendments, review comments and related correspondence.</p> <p>b. Use for all other background documents including general correspondence, interim financial reports, and other records of a general nature.</p> <p>FILE arranged alphabetically by state.</p>	<p>CFD PERMANENT Transfer to NARA 20 yrs. after final settlement, in 10-yr. blocks.</p> <p>Destroy 2 yrs. after final settlement.</p>	<p>After final settle- ment</p> <p>After final settle- ment</p>	<p>Destroy 2 yrs. after final settlement.</p> <p>Destroy 2 yrs. after final settlement.</p>	
1314-1	<p><u>Special Project Cooperative Agreements</u></p>				

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1314-2	<p><u>Between Extension & the State Cooperative Extension Service</u> Each project agreement includes the legal authority; situation; need for project; purpose of project, organization & cooperation; methods of procedure, & sources of maintenance.</p> <p>a. Approved agreements</p> <p>b. Disapproved proposals</p> <p>FILE alphabetically by agency or organization, geographical location, addressee, name or title.</p>	<p>CMS/CFD Destroy 7 calendar yrs. after completion of project.</p> <p>Return to SES or destroy when proposed project is disapproved.</p>	N/A	Destroy 3 calendar yrs. after completion of project.	
1320	<p><u>Bilateral Cooperation</u> with foreign countries, such as the Supplemental Agreement on Scientific & Technological Cooperation under the Treaty of Friendship & Cooperation with Spain dated 2/18/1976. Records consist of reports, correspondence, & supporting materials.</p> <p>FILE alphabetically by agency or organization, geographical location, addressee name or title.</p>	<p>IPS PERMANENT Transfer to NARA 15 yrs. old in 5 yr. blocks.</p>	After termination of agreement.	Destroy after final settlement or when no longer needed for current activities.	
1323	<p><u>Legislative Branch Relations</u> Use for general material pertaining to Extension Service relations with the Legislative Branch.</p> <p>FILE by subject in chronological sequence.</p>	<p>Destroy when 5 yrs. old.</p>	N/A	N/A	
1323	<p><u>Congressional Hearings and Testimony</u> Use for material pertaining to the preparation of material to be delivered</p>	<p>Destroy when 5 yrs. old.</p>	N/A	N/A	

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1324	<p>before congressional hearings and/or testimony.</p> <p>FILE by subject in chronological sequence.</p> <p><u>GAO/GPO/Other Legislative Branch Relations</u> Use for material pertaining to relations with GAO, GPO, & other legislative agencies.</p>	Destroy when 5 yrs. old.	N/A	N/A	
1325	<p>FILE by subject in chronological sequence.</p> <p><u>Reports to Congress</u> Use for material pertaining to the preparation & submission of reports required by Congress.</p>	Destroy when 5 yrs. old.	N/A	N/A	
1340	<p>FILE by title and/or number of report in chronological sequence.</p> <p><u>State and Local Agency Relations</u> Use for material pertaining to relations with State and local agencies.</p>	Destroy when 5 yrs. old.	N/A	N/A	
1400	<p>FILE by subject in chronological sequence.</p> <p><u>PUBLIC AFFAIRS</u> Use for requests for information from the general public & replies involving no administrative action, no policy decisions, & no special compilations or research for reply, including requests for information & inquiries to which replies are made by printed or duplicated material, requests for publications, and acknowledgements & replies; letters of and concerning referrals to other agencies for replies, etc.</p> <p>FILE by control number, name, or subject if applicable.</p>	<p>CIT/DA Destroy after 1 yr.</p>	N/A	Destroy after 1 yr.	
1400-3	<u>Project Control</u>				

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1410	Use for memoranda, reports & other records documenting assignments, progress & completion of projects. FILE Case file alphabetically by title of project. <u>Publishing</u> Use for general material pertaining to the publishing of Extension Service publications which does not fit elsewhere in this category. FILE by title of issuance in chronological sequence.	Destroy 1 yr. after the year in which the project is closed. CIT Destroy when no longer needed for reference.	N/A N/A	Destroy when no longer needed. Destroy when no longer needed for reference.	GRS-16-5
1410-1	<u>State and National Journal Stories</u> Master set of all state & national stories written by Extension Service employees & published in journals related to agriculture. NOTE: Work papers are destroyed when no longer needed for reference, or when 2 yrs. old, whichever is sooner. FILE by subject in chronological sequence.	CIT Destroy when no longer needed for reference.	N/A	N/A	
1410-2	<u>Extension Service Publications</u> Publications such as Extension Review, newsletters, or other Extension Service publications. FILE in chronological sequence.	CIT PERMANENT Transfer to NARA when 10 yrs. old.	when 3 yrs. old	N/A	
1410-3	<u>Publications and Authorizations</u> Use for material pertaining to correspondence, memoranda, forms, & other papers related to the printing, processing & distribution of bulletins, circulars, leaflets, pamphlets, miscellaneous publications, numbered & unnumbered publications, periodicals, etc.	CIT Destroy 1 yr. after completion of job.	N/A	N/A	

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1420	FILE numerically by publication series and number. <u>Composition and Printing</u> Use for general material pertaining to the composition and printing of material which does not fit elsewhere in this category. FILE by agency and job number.	CIT Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
1420-1	<u>Project Files</u> Use for material pertaining to the execution of composition, printing, binding, duplication, & distribution of jobs. Includes requisitions, bills, samples, manuscript clearances, & related papers. NOTE: For obligation copy of documents, see 5000-2d. FILE by requisition number.	CIT Destroy 1 yr. after completion of job.	N/A	Destroy when 1 yr. old.	GRS-13-2a
1420-1-1	<u>Project Planning</u> Use for material pertaining to planning & other technical matters. NOTE: Control registers pertaining to requisitions & work orders are to be destroyed 1 yr. after close of FY in which compiled or 1 yr. after filling of register, whichever is applicable (GRS-13-4). FILE by subject in chronological sequence.	Destroy when 3 yrs. old.	N/A	N/A	GRS-13-2b
1421	<u>Copy and Duplication</u> Use for material pertaining to the reproduction of printed material in fast copy center. FILE in chronological sequence.	Destroy when S/O.	N/A	Destroy when S/O.	
1422	<u>Photocomposition</u> Use for material pertaining to	CIT Destroy when	N/A	Destroy when no	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1430	<p>photocomposition</p> <p>FILE by job number in chronological sequence.</p> <p><u>Publication Distribution</u> Use for material pertaining to publication distribution. Includes revisions & deletions to mailing lists.</p> <p>NOTE: For directives distribution lists see 3010-2.</p> <p>FILE in chronological sequence.</p>	<p>no longer needed for reference.</p> <p>CIT Destroy when S/O.</p>	N/A	<p>longer needed for reference.</p> <p>Destroy when change is completed.</p>	
1430-1	<p><u>Congressional Inquiries and Orders</u> Use for Congressional inquiries & their acknowledgements regarding publications of the Department/Agency. Includes requests submitted to GPO for congressional requests of a large quantity of publications.</p> <p>FILE alphabetically, & by requisition number in chronological sequence.</p>	<p>CIT Destroy 3 mos. after transmittal or reply.</p>	N/A	N/A	GRS-14-1
1440	<p><u>News Releases and Speeches</u> Use for copies of formal informational releases & publications, press conference transcripts, official speeches, and indexes thereto.</p> <p>FILE numerically by press release number.</p>				
1440-1	<p><u>Press Release</u> Master set of all releases issued by the Department. The press releases also contain biographies of important individuals and all of the Secretary's speeches.</p> <p>FILE numerically by press release number.</p>	<p>CIT Destroy when no longer needed for reference.</p>	N/A	<p>Destroy when no longer needed for reference.</p>	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1440-2	<u>Speeches, Lectures, Statements & Talks</u> Before the general public, including presentations on radio & television. Policy-making speeches of the Administrator or other representatives designated by the Administrator. FILE in chronological order.	OA PERMANENT Transfer to NARA when 15 yrs. old in 5-yr. blocks.	when 5 yrs. old.	Destroy when no longer needed for reference.	
1440-2-1	<u>Other</u> Speeches, lectures, statements, & talks. FILE in chronological order.	Destroy when 5 yrs. old or when obsolete whichever is later.	N/A	N/A	
1450	<u>Radio and Television</u> Use for agency-sponsored radio or television news releases. FILE by subject in chronological sequence.	Destroy when no longer needed.	N/A	N/A	
1450-1	<u>Sound Recordings</u> Used to document, carry on, or promote substantive agency activities, procedures, & programs consisting of the master tape, & the original tape for each magnetic audio tape recordings. FILE by subject, production or series title & thereunder chronologically.	CIT PERMANENT Forwarded to OPA, USDA, per OPA schedule.	N/A	N/A	
1460	<u>Media and Public Liaison</u> Use for media appearances by agency representatives & the prepared material used when acting as public liaison. FILE by subject.	Destroy when no longer needed.	N/A	N/A	
1470	<u>Graphic and Exhibit Design</u> Use for viewgraphs, routine artwork for flyers, posters, letterheads, and other graphic & exhibit material.	Destroy 1 yr. after final publication or	N/A	N/A	GRS-21-6

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1480	FILE by subject in chronological sequence. <u>Photography</u> Use for black & white & colored original and negatives, color transparencies slide photography and slide sets or filmstrips.	when no longer needed.			
1480-1	<u>Still Color Picture Files</u> Color photography consisting of copy prints and negatives collected from a variety of sources including the USDA central file, Land-Grant University photographic collections, county and state level photographic collections and amateur photographers, and do not document substantive agency activities and programs or duplicate other Ext. & USDA photographics which do. FILE by subject.	CIT Destroy when no longer needed.	N/A	N/A	
1480-2	<u>Still Black and White Picture Files</u> Still photographs (black & white) consisting of copy prints and negatives collected from a variety of sources including the USDA central files, Land-Grant University photographic collections, county and state level photographic collections and amateur photographers, and do not document substantive agency activities and programs or duplicate other Ext. & USDA photographics which do. FILE by subject.	CIT Destroy when no longer needed.	N/A	N/A	
1480-4	<u>Photography Conversion and Storage</u> Use for material pertaining to the technologies used in converting and storing color images and photos to some other medium.	CIT Destroy when no longer needed for administrative use.	N/A	N/A	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1490	FILE by subject in chronological sequence. <u>Video and File</u> Use for material pertaining to agency sponsored file or video recordings.				
1490-1	FILE by subject in chronological sequence. <u>Motion Picture Production Files</u> Files contain material pertaining to the production of films, video tapes, including clearance signed by individuals for use of their narration, acting and music rights; scripts, & a copy of each release giving full exhibition rights of the film to the television industry.	CIT PERMANENT Forwarded to OPA, USDA, per OPA schedule.	N/A	N/A	
1490-2	FILE by production number. <u>Motion Picture Film or Video Tape</u> Use to document, carry on, or promote substantive agency activities, procedures, & programs. In the case of Motion Picture Film: camera original, optical sound track, preprint elements, and a sound projection print. In case of video tape: master, edit master, & dub for: a. Production made for distribution.	CIT PERMANENT Forwarded to OPA, USDA, per OPA schedule.	N/A	N/A	
	FILE by production number. b. Special subject productions for use within the Department/Agency.	CIT PERMANENT Forward to OPA, USDA per OPA schedule.	N/A	N/A	
	FILE by production number. c. TV Film Newsfeatures Sound on film newsclips sent to commercial television stations from which a representative selection of newsfeatures	CIT PERMANENT Forward to OPA, USDA per	N/A	N/A	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1500	will be made annually by the Agency. FILE by production number. d. TV Public Service Announcements Ten to 60 second spot announcements on agricultural subjects which have a general public interest focus from which a representative selection of announcements will be made annually by the Agency. FILE by production number.	OPA schedule. CIT PERMANENT Forward to OPA, USDA per OPA schedule.	N/A	N/A	
	e. Additional duplicate prints or video dubs identified in 1490-2a,b, and those items not selected under 1490-2c and d. FILE by production number.	CIT Destroy or erase when no longer needed for adminis- trative use.	N/A	N/A	
	f. Other films or video tapes having limited administrative use or interest such as production whose subject matter is transitory or not related to or needed to document substantive agency activities, operations, or responsibilities. FILE by production number.	CIT Destroy or erase when no longer needed for adminis- trative use.	N/A	N/A	
	g. Stock Motion Picture Film or Video Tapes Unedited footage productions for use in Extension Service consisting of original negatives, work prints, & video masters. FILE by can and roll number.	CIT PERMANENT Forward to OPA, USDA per OPA schedule.	N/A	N/A	
	<u>LEGAL AFFAIRS AND PROCEEDINGS</u> Use for material of a general nature which pertains to hearings & other legal proceedings before the Dept. of	LIA Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1500-3	<p>Agriculture which are not described elsewhere in this category.</p> <p>FILE in chronological sequence.</p> <p>a. <u>Correspondence</u> and supporting documents used in the development of proposed laws & regulations pertaining to ES programs. Includes copies of appropriation bills, House & Senate Reports, Congressional reports, & similar material relating specifically to the historical background of the Extension Service & records to a precedent-setting nature relating to the administration of ES programs.</p> <p>FILE in chronological ssequence.</p> <p><u>Project Control</u> Use for memoranda, reports, and other records documenting assignments, progress and completion of projects.</p> <p>FILE case file alphabetically by title of project.</p>	<p>LIA Destroy when no longer needed.</p> <p>Destroy 1 yr. after the year in which the project is closed.</p>	<p>N/A</p> <p>N/A</p>	<p>N/A</p> <p>Destroy when no longer needed.</p>	<p>GRS-16-5</p>
1511	<p><u>Legislative Review</u> Use for material pertaining to review of legislative material.</p> <p>FILE by subject in chronological sequence.</p>	<p>Destroy when S/O.</p>	<p>N/A</p>	<p>N/A</p>	
1513	<p><u>Opinions</u> Use for opinions relating to OGPA.</p> <p>FILE by subject in chronological sequence.</p>	<p>LIA Destroy when 4 yrs. old.</p>	<p>N/A</p>	<p>N/A</p>	
1520	<p><u>Legal Proceedings</u> Use for material pertaining to legal proceedings which involve the Extension Service.</p>	<p>LIA Destroy when 3 yrs. old.</p>	<p>N/A</p>	<p>Destroy when 1 yr. old.</p>	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1600	<p>FILE in chronological sequence.</p> <p><u>FACILITIES AND SPACE MANAGEMENT</u> Use for material pertaining to the overall or general routine facilities & space management activities which are not specifically described in the following categories.</p>	CMS/MSB Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
1600-3	<p>FILE by subject in chronological sequence.</p> <p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE case file alphabetically by title of project.</p>	CMS/MSB Destroy 1 yr. after the year in which the project is closed.	N/A	Destroy when no longer needed.	GRS-16-5
1610	<p><u>Space Planning, Classification & SLUC</u> Use for material pertaining to the general management of space planning, classification & SLUC not described below.</p> <p>FILE chronologically by agency and location.</p>	CMS/MSB Destroy when 2 yrs. old.	N/A	Destroy when 2 yrs. old.	
1620	<p><u>Space Acquisition and Assignment</u> Use for material pertaining to the acquisition, allocation, & release of space. Includes building plans used in space planning assignments & adjustments.</p> <p>FILE chronologically by location.</p>	CMS/MSB Destroy 2 yrs. after termination of assignment, or when lease is cancelled, or when plans are S/O.	N/A	Destroy 2 yrs. after termination of assignment, or when lease is cancelled, or when plans are S/O.	GRS-11-2a
1620-1	<p><u>Reports</u> Use for material pertaining to reporting of occupied space in Metro Area & field locations.</p> <p>FILE in chronological sequence.</p>	CMS/MSB Destroy when 2 yrs. old.	N/A	Destroy when 1 yr. old.	GRS-11-2b (1) (2)

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1630	<p><u>Space Utilization</u> Use for material pertaining to the full utilization of available space.</p> <p>FILE chronologically and location.</p>	<p>CMS/MSB Destroy 2 yrs after termination of assignment, or when lease is cancelled, or when plans are S/O.</p>	N/A	N/A	GRS-11-2a
1640	<p><u>Alteration and Maintenance</u> Use for material pertaining to alterations and maintenance services.</p> <p>FILE chronologically by agency and location.</p>	<p>CMS/MSB Destroy 3 mos after work is performed or requisition is canceled.</p>	N/A	Destroy when work is completed.	GRS-11-5
1650	<p><u>Building Safety/Security</u> Use for material pertaining to the safeguarding of facilities against sabotage and unauthorized entry.</p> <p>FILE by subject in chronological sequence.</p>	<p>CMS/MSB Destroy when 3 yrs. old, or upon discontinuance of facility, whichever is sooner.</p>	N/A	N/A	GRS-18-9
1660	<p><u>Parking Services</u> Use for material pertaining to the allocation of parking spaces. Includes standard criteria for selection.</p> <p>FILE by agency and name (s).</p>	<p>OA/MSB Destroy when 3 yrs. old.</p>	N/A	N/A	
1670	<p><u>Utility Services</u> Use for material which pertains to utility services used by the Agency.</p> <p>FILE by subject.</p>	<p>Destroy when 3 yrs. old.</p>	N/A	Destroy when 2 yrs. old.	
1680	<p><u>Conference Rooms/Auditoriums/Vendor Services</u> a. Use for material pertaining to assignment of conference rooms & the auditorium, including set-ups, e.g.,</p>	<p>Destroy when 3 months old.</p>	N/A	Destroy after use of facilities.	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1700	<p>podiums, microphones, etc.</p> <p>FILE in chronological sequence.</p> <p>b. Use for material related to vendor services.</p> <p>FILE in chronological sequence.</p> <p><u>INVESTIGATIONS AND AUDITS</u> Use for material of a general nature pertaining to internal & external investigations or audits not covered elsewhere under this category. (For personnel management audits and investigations of specific agency employees, including desk audits, see 4050-2.)</p> <p>FILE by organization in chronological sequence.</p>	<p>Destroy when no longer needed.</p> <p>Destroy when 3 yrs. old.</p>	<p>N/A</p> <p>N/A</p>	<p>Destroy when no longer needed.</p> <p>Destroy when 2 yrs. old.</p>	
1700-2-1	<p><u>Investigative Reports</u> Reports maintained to enable Extension Service to respond to Freedom of Information & Privacy Act requests.</p> <p>FILE by agency in chronological sequence.</p>	<p>CMS/PMSD Destroy when no longer needed.</p>	<p>N/A</p>	<p>N/A</p>	
1700-3	<p><u>Project Control</u> Use for memoranda, reports, & other records documenting assignments, progress & completion of projects.</p> <p>FILE Case file alphabetically by title of project.</p>	<p>Destroy 1 yr. after the year in which the project is closed.</p>	<p>N/A</p>	<p>Destroy when no longer needed.</p>	<p>GRS-16-5</p>
1710	<p><u>Investigations</u> Use for material pertaining to internal and external investigations of known or alleged irregularities & violations of laws &</p>	<p>WF&A Place in inactive file when case closed. Cut off</p>	<p>N/A</p>	<p>Retain file for 3 yrs. destroy when no longer needed.</p>	<p>GRS-22-1b</p>

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1720	<p>regulations relating to Extension program or personnel. Files consist of the official record copy of the investigation report, correspondence, notes & attachments, (signed statements, copies of invoices, etc.) & work papers (including computer printouts).</p> <p>FILE by organizations in chronological sequence.</p> <p><u>Audits</u> Files consisting of the official record of the audit report & related work papers (including computer printouts), correspondence, memoranda & exhibits. These records pertain to the review & appraisal of the Extension Service's programs & management operating procedures, plans & policies, & also to Agency related activities with external enterprises such as associations, corporations, etc.</p> <p>FILE by organization in chronological sequence.</p>	<p>inactive at end of FY. Destroy 10 yrs. after cutoff.</p> <p>Cut off at end of FY in which case is closed. Destroy 8 yrs. after cutoff.</p>	N/A	Retain file for 3 yrs. destroy when no longer needed.	GRS-22-2
1720-1	<p><u>Audits of State Extension Service Offices</u> Includes 1890-Land-Grant Colleges Programs.</p> <p>FILE by chronological sequence.</p>	<p>Cut off at end of FY in which case is closed. Destroy 8 yrs. after cutoff.</p>	N/A	Retain file for 3 yrs. destroy when no longer needed.	GRS-22-2
1800	<p><u>EMERGENCY PREPAREDNESS AND CONTINGENCY PLANNING</u> Use for copies of plans or directives pertaining to the formulation and implementation of plans (such as evacuation plans) for protection of life & property during emergency conditions.</p>	<p>DA/MGMT Destroy 3 yrs. after issuance of a new plan or directive.</p>	N/A	Destroy when S/O.	GRS-18-27

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
1800-3	<p>FILE in chronological sequence.</p> <p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress and completion of projects.</p> <p>FILE Case file alphabetically by title of project.</p>	<p>Destroy 1 yr. after the year in which the project is closed.</p>	N/A	<p>Destroy when no longer needed.</p>	GRS-16-5
1810	<p><u>Emergency Procedures & Planning (Crisis Management)</u> Use for material pertaining to evacuation relocation, & continuity of operation, personnel assignments & related procedures.</p> <p>FILE in chronological sequence.</p>	<p>Destroy when S/O.</p>	N/A	N/A	
1820	<p><u>Civil Defense Program</u> Use for material pertaining to civil defense disasters that would affect all employees and functions.</p> <p>FILE in chronological sequence.</p>	<p>Destroy when S/O.</p>	N/A	N/A	
1830	<p><u>Nature and Other Disasters</u> Use for material pertaining to disasters produced by nature, e.g., flooding, fires, etc.</p> <p>FILE by subject in chronological sequence.</p>	<p>Destroy when no longer needed for reference.</p>	N/A	N/A	
2000	<p><u>BUDGET DEVELOPMENT, PRESENTATION AND EXECUTION</u> Use for material of a general nature which pertains to the preparation, development, review, adjustment, submission, & approval of the budget. Includes reports, schedules, charts, estimates, & related documents which do not fit elsewhere in this category.</p>	<p>CMS/BAD Destroy 3 yrs. after close of FY covered by budget.</p>	N/A	<p>Destroy 3 yrs. after close of FY covered by budget.</p>	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2000-2-1	<p>FILE by Fiscal Year.</p> <p><u>State Financial Budgets and Reports</u> Submitted annually by the State Extension Services.</p>	<p>OA Destroy at the end of 7 fiscal years.</p>	N/A	N/A	
2000-3	<p>FILE by chronological sequence.</p> <p><u>Project Control</u> Use for memoranda, reports, & other records documenting assignments, progress & completion of projects.</p>	<p>Destroy 1 yr. after the year in which the project is closed.</p>	N/A	Destroy when no longer needed.	GRS-16-5
2010	<p>FILE case file alphabetically by title of project.</p> <p><u>Budget Planning and Development</u> Use for material pertaining to budget planning, estimates, justifications, & supplementary material such as explanatory notes, narratives, & program performance. Also includes previous supplementary or amended budget materials.</p>	<p>CMS/BAD Destroy 10 yrs. after close of FY covered by budget.</p>	N/A	Destroy 5 yrs. after close of FY covered by budget.	
2030	<p>FILE by Fiscal Year.</p> <p><u>Budget Presentation</u> Use for copies of the budget (original or revised) submitted to Office of the Secretary for approval.</p> <p>FILE in chronological sequence.</p> <p>a. One record copy of the budget submitted to Office of the Secretary for approval.</p> <p>FILE in chronological sequence.</p> <p>b. All other copies</p>	<p>OA Destroy 10 yrs. after close of FY covered by budget.</p> <p>Destroy when no longer</p>	N/A	Destroy 10 yrs. after close of FY covered by budget.	
			N/A	Destroy when no longer needed for	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2040	<p>FILE in chronological sequence.</p> <p><u>Budget Execution</u> Use for material pertaining to approved budget implementation & maintenance of financial controls over appropriate funds. Include apportionments, allocations, allotments & workplans, obligations & outlays, ceilings, requirements reimbursements, & nonappropriated funds.</p> <p>NOTE: Include here financial data <u>only</u> if it is directly budget supportive. Use 2100 for regular accounting documentation.</p> <p>FILE by Fiscal Year.</p>	<p>needed for reference.</p> <p>CMS/BAD Destroy 10 yrs. after close of FY covered by budget.</p>	N/A	reference. Destroy 10 yrs. after close of FY covered by budget.	
2050	<p><u>Budget Reporting</u> a. Annual reports on the status of appropriation accounts & apportionment.</p> <p>FILE by subject and Fiscal Year.</p> <p>b. All other reports.</p> <p>FILE by subject and Fiscal Year.</p>	<p>CMS/BAD Destroy when 5 yrs. old.</p> <p>Destroy 3 yrs. after the end of the FY covered by budget.</p>	N/A N/A	<p>Destroy when 5 yrs. old.</p> <p>Destroy 3 yrs. after the end of FY covered by budget.</p>	<p>GRS-5-3a</p> <p>GRS-5-3b</p>
2100	<p><u>FINANCIAL MANAGEMENT/ACCOUNTING</u> Use for material pertaining to overall financial management & accounting activities not specifically described in the following categories.</p> <p>FILE by subject in chronological sequence.</p>	<p>CMS/BAD Destroy when 3 yrs. old.</p>	N/A	Destroy when 2 yrs. old.	
2100-2	<p><u>Financial Priorities</u> Use for material pertaining to the status of activities of all financial priorities.</p>	<p>CMS/BAD Destroy when 3 yrs. old.</p>	N/A	Destroy when 1 yr. old.	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2100-3	<p>FILE in chronological sequence.</p> <p><u>Internal Controls</u> Use for material which pertains to the plans of organizations and all the coordinated methods & measures adopted by the Agency to safeguard assets, check the accuracy & reliability of accounting data, promote operational efficiency, & encourage adherence to prescribed managerial policies.</p>	CMS/BAD Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
2100-4	<p>FILE in chronological sequence.</p> <p><u>Systems Review and Analysis</u> Use for material which pertains to indirect cost review & negotiations. Agency financial management studies, and assessments of the Agency's reporting needs.</p>	CMS/BAD Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
2100-6	<p>FILE in chronological sequence.</p> <p><u>Project Control</u> Use for memoranda, reports, & other records documenting assignments, progress and completion of projects.</p>	CMS/BAD Destroy 1 yr. after the year in which the project is closed.	N/A	Destroy when no longer needed.	GRS-16-5
2110	<p>FILE alphabetically by title of project.</p> <p><u>Accounting System</u> Use for material pertaining to accounting systems approved by GAO; management advisory services for financial systems; monitoring systems development processes and the coordination of accounting system regulations.</p>	CMS/BAD Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
2160-1	<p>FILE in chronological sequence.</p> <p><u>Working Capital Fund</u> Use for material of a general nature which pertains to WCF.</p>	CMS/BAD Destroy 3 yrs. after close of	N/A	Destroy 3 yrs. after close of FY	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2160-2	<p>FILE by subject.</p> <p><u>Planning, Development, and Approval</u> Use for material pertaining to Working Capital Fund budget preparation, planning, and final approved budgets.</p>	<p>FY covered by budget.</p> <p>CMS/BAD Destroy 5 yrs. after close of FY covered by budget.</p>	N/A	<p>covered by budget.</p> <p>Destroy 5 yrs. after close of FY covered by budget.</p>	
2160-3	<p>FILE by subject.</p> <p><u>Financial Review</u> Use for material pertaining to WCF fund reviews, summary reviews & individual cost centers reviews of a financial nature.</p>	<p>CMS/BAD Destroy 5 yrs. after close of FY covered by budget.</p>	N/A	<p>Destroy 5 yrs. after close of FY covered by budget.</p>	
2160-4	<p>FILE by subject.</p> <p><u>Management Council Cost Distributions</u> Use for material pertaining to the distribution of center agency billings (GSA, DOL) to Departmental agencies; FTS, SLUC, OWCP, etc.</p>	<p>CMS/BAD Destroy 5 yrs. after close of FY covered by budget.</p>	N/A	<p>Destroy 5 yrs. after close of FY covered by budget.</p>	
2160-5	<p>FILE by subject.</p> <p><u>Working Capital Fund Cost Distribution</u> Use for material pertaining to Working Capital Fund cost center expense distribution to user agencies of Printing Plant, & Copier Services, etc.</p>	<p>CMS/BAD Destroy 5 yrs. after close of FY covered by budget.</p>	N/A	<p>Destroy 5 yrs. after close of FY covered by budget.</p>	
2160-6	<p>FILE by subject.</p> <p><u>Department Centralized Reimbursable Program Cost Distribution</u> Use for material pertaining to Departmental centralized costs or expenses made through special reimbursable accounts which are prorated to the agencies, e.g., Office of Personnel training programs & Health Services.</p> <p>FILE by subject.</p>	<p>CMS/BAD Destroy 5 yrs. after close of FY covered by budget.</p>	N/A	<p>Destroy 5 yrs. after close of FY covered by budget.</p>	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2170	<p><u>Cost Determination (A-76)</u> Use for material which provides a basis for efficiently using available resources in operating commercial & industrial type activities. A-76 provides guidance in determining the least-cost method (i.e., in-house or contracting out) or providing services of a commercial/industrial nature.</p> <p>FILE in chronological sequence.</p>	CMS/MSB Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
2180	<p><u>Property</u> Use for material pertaining to property accounting.</p> <p>FILE in alphabetical sequence.</p>	CMS/BAD Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
2200	<p><u>FISCAL MANAGEMENT</u> Use for material of a general nature which pertains to fiscal management which does not fit elsewhere in this category.</p> <p>FILE by subject in chronological sequence.</p>	CMS/BAD Destroy when 2 yrs. old.	N/A	Destroy when 2 yrs. old.	GRS-6-5a
2200-3	<p><u>Payment Control Listing</u> Use for computer listings, batch reports etc., generated to perform the housekeeping functions required for fiscal accountability.</p> <p>FILE by subject in chronological sequence.</p>	CMS/BAD Destroy when no longer needed.	N/A	Destroy when no longer needed for reference.	
2200-4	<p><u>Reports/Studies</u> Use for reports and studies which pertain to fiscal management.</p> <p>FILE by agency and subject.</p>	Destroy 5 yrs. after close of FY covered by budget.	N/A	Destroy 5 yrs. after close of FY covered by budget.	
2200-5	<p><u>Project Control</u> Use for memoranda, reports, & other records documenting assignments progress & completion of projects.</p>	Destroy 1 yr. after the year in which the project is closed.	N/A	Destroy when no longer needed.	GRS-16-5

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2210	<p>FILE Case file alphabetically by title of project.</p> <p><u>Appropriations, Receipts & Fund Accounts</u> Use for material pertaining to availability, collection, custody, & deposit of funds including appropriation warrants & certificates of deposits.</p> <p>FILE by subject.</p>	<p>CMS/BAD Destroy when 3 yrs. old.</p>	N/A	<p>Destroy when 3 yrs. old.</p>	GRS-6-4
2210-1	<p><u>Deposits</u> Use for material pertaining to deposits.</p> <p>FILE by name of vendor.</p>	<p>CMS/BAD Destroy 6 yrs. 3 mo. after period covered by account.</p>	N/A	<p>Destroy when 3 yrs. old.</p>	GRS-6-1a&b
2220	<p><u>Collections</u> Use for material pertaining to billings collections, fees, collection schedules and delinquent accounts.</p> <p>FILE by name of vendor.</p>	<p>CMS/BAD Destroy 6 yrs. 3 mos. after period covered by account.</p>	N/A	<p>Destroy when 3 yrs. old.</p>	GRS-6-1a&b
2230	<p><u>Obligations</u> Use for material pertaining to routine accounting records of allotted fund obligations subsidiary to the summary allotments status records. Include obligation estimates paid and unpaid and classified expenditure listings.</p> <p>FILE by agency.</p>	<p>CMS/BAD Destroy 6 yrs. 3 mos. after period covered by account.</p>	N/A	<p>Destroy when 3 yrs. old.</p>	GRS-6-1a&b
2240	<p><u>Disbursements</u> Use for material pertaining to allotted fund disbursements.</p> <p>FILE by agency.</p>	<p>CMS/BAD Destroy 6 yrs. 3 mos. after period covered by account.</p>	N/A	<p>Destroy when 3 yrs. old.</p>	GRS-6-1a&b
2240-1	<p><u>Payments</u> Use for material pertaining to the amounts disbursed to payees.</p>	<p>CMS/BAD Destroy 6 yrs. 3 mos. after period covered</p>	N/A	<p>Destroy 3 yrs. after the period of</p>	GRS-6-1a&b

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2240-1-1	FILE by individual name, or firm. <u>Checks</u> Use for material pertaining to checks issued, stolen, misplaced, mutilated, or destroyed.	by account. CMS/BAD Destroy when 3 yrs. old.	N/A	account. Destroy when 3 yrs. old.	GRS-6-4
2240-1-2	FILE by individual name. <u>Expenditure Posting and Control</u> Use for posting and control media which supports the general ledger. FILE by agency.	CMS/BAD Destroy when 3 yrs. old. NFC/OFM Destroy 6 yrs. 3 mos. after period covered by account.	N/A	Destroy when 2 yrs. old.	GRS-7-4 GRS-6-1a
2240-1-3	<u>Fiscal Irregularities</u> Use for material pertaining to accounting authorization irregularities. FILE by agency.	CMS/BAD Destroy when 15 yrs. old.	When 5 yrs. old.	Destroy when 1 yr. old.	
2240-1-4	<u>GAO Exceptions</u> Use for material pertaining to General Accounting Office notices of exceptions formal or informal, & related correspondence. FILE by agency.	CMS/BAD Destroy 1 yr. after exception has been reported as cleared by GAO.	N/A	Destroy when 1 yr. old.	GRS-6-2
2260	<u>Withdrawals, Restorations, & Transfers of Appropriation Balances</u> Use for material of a general nature which pertains to accounting for & disbursing of funds, including obligations, control of expenditures, availability and transfer, & advancement of funds, etc. FILE by subject.	Destroy when 3 yrs. old.	N/A	Destroy when 2 yrs. old.	GRS-6-5a&b
2270	<u>Accountable Officers</u> Use for material pertaining to statements	Destroy 6 yrs. 3		Destroy when 2	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2280	<p>of transactions & accountability collection schedules & vouchers, & disbursement schedules & vouchers.</p> <p>FILE by subject.</p> <p><u>Fiscal and Accounting Codes</u> Use for material pertaining to code numbers used in the accounting system.</p> <p>FILE by code.</p>	<p>mos. after period covered by account.</p> <p>CMS/BAD Destroy when 3 yrs. old.</p>	N/A	yrs. old.	GRS-6-1a
2300	<p><u>TRAVEL AND TRANSPORTATION</u> Use for material of a general nature which pertains to travel & transportation functions, not covered elsewhere in the following categories.</p> <p>NOTE: Logs and registers of accountability are to be destroyed 1 yr. after entries are cleared.</p> <p>FILE by agency and subject.</p>	<p>CMS/BAD Destroy when 2 yrs. old.</p>	N/A	Destroy when 3 yrs. old.	GRS-6-5b
2300-2	<p><u>Request and Authorizations</u> Use for copies of vouchers, memorandum copies of travel requests, travel authorizations, & all supporting papers.</p> <p>NOTE: Destroy unused ticket redemption forms, such as SF-1170, when no longer needed for administrative use (GRS 9-3c)</p> <p>FILE chronologically by unit & employee.</p>	<p>CMS/BAD Destroy when 6 yrs. old.</p>	N/A	Destroy when 1 yr. old.	GRS-9-4a&b
2300-3	<p><u>Reimbursements</u> Use for record pertaining to reimbursing individuals (e.g., travel orders, per diem vouchers, hotel reservations, & all supporting papers documenting official travel of officers, employees, dependents or other authorized by law to travel).</p>	<p>CMS/BAD Destroy when 6 yrs. old.</p>	N/A	Destroy when funds are obligated.	GRS-9-3a&b

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2300-4	FILE alphabetically by employee. <u>Reports</u> Use for travel reports.	CMS/BAD Destroy when 3 yrs. old.	N/A	N/A	
2300-5	FILE by subject in chronological sequence. <u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.	Destroy 1 yr. after the year in which the proj- ect is closed.	N/A	Destroy when no longer needed.	GRS-16-5
2310	FILE Case file alphabetically by title of project. <u>Temporary Duty Travel - Domestic</u> Use for material of a general nature which pertains to temporary duty - domestic travel.	CMS/BAD Destroy when 2 yrs. old.	N/A	Destroy when 1 yr. old.	
2320	FILE in chronological sequence or alphabetically by employee. <u>Temporary Duty Travel - Foreign</u> Use for material of a general nature which pertains to temporary duty - foreign travel.	CMS/BAD Destroy when 2 yrs. old.	N/A	Destroy when 1 yr. old.	
2330	FILE in chronological sequence or alphabetically by employee. <u>Relocation</u> Use for material pertaining to employee travel & relocation allowances.	CMS/BAD Destroy 6 yrs. & 3 mos. after period covered by account.	N/A	Destroy when 1 yr. old.	GRS-6-1a
2340	FILE by subject in chronological sequence. <u>Sickness or Death while in Travel Status</u> Use for material pertaining to the necessary arrangement required in the event an employee becomes ill or dies while in travel status. (In case of death, information is filed in OPF).	CMS/PMSD Destroy 6 yrs. & 3 mos. after period covered by account.	N/A	Destroy when 1 yr. old.	GRS-6-1a

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2350	FILE by employee social security number. <u>Transportation of Things</u> Use for material of a general nature which pertains to the transportation of things. FILE in chronological sequence.	CMS/MSB Destroy when 2 yrs. old.	N/A	Destroy when 1 yr. old.	GRS-9-4(a)
2350-1	<u>Freight</u> Use for material pertaining to movement of goods by government or commercial carriers. May include commercial or Government bills of lading & other data which documents the transaction. FILE by subject.	CMS/MSB Destroy when 6 yrs. old.	N/A	Destroy when 1 yr. old.	GRS-9-1a
2350-2	<u>Transportation Rates</u> Use for material which pertains to carrier rates. FILE by carrier.	CMS/MSB Destroy when S/O.	N/A	N/A	
2350-3	<u>Reports</u> Use for transportation reports, e.g., shortage & demurrage, etc. FILE by subject in chronological sequence.	Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
2350-4	<u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of project. FILE: Case file alphabetically by the title of the project.	Destroy 1 yr. after the year in which the project is closed.	N/A	Destroy when no longer needed.	GRS-16-5
2500	<u>CLAIMS</u> Use for material of a general nature pertaining to claims for a right to something, e.g., a title to a debt, privileges, or other things in the possession of another.	CMS Destroy 1 yr. after final disposition of case.	N/A	Destroy 1 yr. after final disposition of case.	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2500-2	FILE by agency and claimant. <u>Reports</u> Use for claims reports.	CMS Destroy when 3 yrs. old.	N/A	Destroy when 3 yrs. old.	
2500-3	FILE by agency and subject. <u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress and completion of projects.	Destroy 1 yr. after the year in which the proj- ect is closed.	N/A	Destroy when no longer needed.	GRS-16-5
2540	FILE Case file alphabetically by title of project. <u>Damage/Loss of Government Property</u> Use for material pertaining to the willful destruction of or damage, theft, etc., to Government property.	CMS Destroy 1 yr. after final disposition.	N/A	Destroy 1 yr. after final disposition.	
2550	FILE by subject. <u>Damage/Loss of Shipments</u> Use for material pertaining to the schedules of valuables shipped, correspondence, memoranda, & other records relating to the administration of the Government Losses in Shipment Act, & any claims that may ensue.	CMS Destroy when 6 yrs. old.	N/A	N/A	GRS-9-2
2560	FILE in chronological sequence. <u>Irregularities/Discrepancies</u> Use for material pertaining to the documentation of irregularities/discrepancies with sufficient information to enable processing of claims.	CMS Destroy 1 yr. after final disposition of case.	N/A	Destroy 1 yr. after final disposition of case.	
2570	FILE by subject in chronological sequence. <u>Waivers</u> Use for material pertaining to the relinquishing of a known right, interest, etc.	CMS Destroy 1 yr. after final	N/A	Destroy 1 yr. after final disposition of	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2600	<p>FILE by subject.</p> <p><u>PAY AND ALLOWANCES</u> Use for material of a general nature pertaining to salaries & deduction, & expenses such as cost of living, living quarters & education allowance.</p>	<p>disposition of case.</p> <p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	<p>case.</p> <p>Destroy when 3 yrs. old.</p>	
2600-2	<p>FILE by subject in chronological sequence.</p> <p><u>Payroll</u> Correspondence between agency & payroll processor regarding general, routine administrative issues that do not relate to individual payments.</p>	<p>CMS/PMSD Destroy when 2 yrs. old.</p>	N/A	<p>Destroy when 2 yrs. old.</p>	GRS-2-24
2600-2-1	<p>FILE by subject in chronologic sequence.</p> <p><u>Payroll Preparation & Processing</u> Use for material pertaining to payroll control services, whether in electronic or paper form, inclusive of flexitime attendance records, payroll summary control & certification control documents which include all source documents used to authorize or change payments to payees.</p> <p>a. <u>Scannable Forms</u> NFC will maintain the certified scannable forms. <u>Other offices</u> must maintain all appropriate <u>supporting</u> documentation (sign-in & sign-out registers, time cards, overtime approvals, and leave authorizations).</p> <p>FILE by agency & alphabetically by employee.</p> <p>b. <u>Electronic Transmission</u> NFC will maintain in fiche form the</p>	<p>CMS/PMSD Destroy after GAO audit or when 6 yrs. old whichever is sooner.</p> <p>CMS/PMSD Destroy 6 yrs. 3</p>	N/A	<p>Destroy when 3 yrs. old.</p> <p>Destroy when 3</p>	GRS-2-8 GRS-6-1a

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2600-2-2	<p>personal payment history files required in Fair Labor Standards Act (FLSA) cases & court ordered restorations. <u>Other offices</u> must maintain the <u>certified</u> T&A report (i.e., printout, worksheets, etc.) & all appropriate supporting documentation.</p> <p>FILE alphabetically by employee.</p> <p><u>Levy and Garnishment</u> Use for official notice of levy or garnishment (IRS Form 668A or equivalent) change slip, workpapers, correspondence, release & other forms, & records relating to charges against retirement funds or attachment of salary for payment of other debts of Federal employees.</p> <p>FILE in OPF.</p>	<p>mos. after period covered by account.</p> <p>CMS/PMSD Destroy 3 yrs. after garnishment is terminated.</p>	N/A	<p>yrs. old.</p> <p>Destroy when 2 yrs. old.</p>	GRS-2-18
2600-2-3	<p><u>Payroll Changes</u> Use for material pertaining to payroll changes, slips, exclusive of those of the OPF.</p> <p>FILE by social security number & in chronological sequence.</p>	<p>CMS/PMSD Destroy when related records are audited by GAO or when 3 yrs. old, whichever is sooner.</p>	N/A	<p>Destroy 1 mo. after end of pay period.</p>	GRS-2-23a&b
2600-2-4	<p><u>Administrative Payroll Report Files</u> Use for workload & personnel management reports or data which pertain to payroll operations & pay administration.</p> <p>FILE in chronological sequence.</p>	<p>CMS/PMSD Destroy when 2 yrs. old.</p>	N/A	<p>Destroy when 3 yrs. old.</p>	GRS-2-22b
2600-2-5	<p><u>Allotment Authorization</u> Use for material which pertains to request & authorization for or change & revocation of allotments.</p> <p>a. U.S. Savings Bond Authorization, SF</p>	<p>CMS/PMSD Destroy when</p>			

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2600-2-6	1192 or equivalent. FILE by subject and social security number. b. All other authorizations FILE by subject and social security number. <u>Employee Tax Exemptions</u> Use for withholding tax exemption certificates, such as IRS Forms W-4, & similar state tax exemption forms. FILE by social security number.	superseded or after separation of employee. Destroy after GAO audit or when 3 yrs. old, whichever is sooner. CMS/PMSD Destroy 4 yrs. after information is S/O.	N/A N/A N/A	N/A N/A N/A	GRS-2-14a GRS-2-15b GRS-2-13a&b
2600-2-7	<u>Tax Files</u> Use for reports of withheld Federal taxes, such as IRS Form W-3 with related papers, including reports relating to income & social security taxes. FILE by social security number.	CMS/PMSD Destroy when 4 yrs. old.	N/A	N/A	GRS-2-13c
2600-2-8	<u>Payment Control Listing</u> Use for material pertaining to pay & allowance designations. Includes cost verification & sub-voucher registers, and error listings. FILE by subject in chronological sequence.	CMS/PMSD Destroy 6 yrs. 3 mos. after period covered by the account.	N/A	N/A	GRS-6-1a
2600-3	<u>Reports</u> Use for reports pertaining to pay and/or allowances. FILE by subject.	CMS/PMSD Destroy when 5 yrs. old.	N/A	Destroy when 5 yrs. old.	
2600-4	<u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.	Destroy 1 yr. after the year in which the proj-	N/A	Destroy when no longer needed.	GRS-16-5

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
2610	<p>FILE Case file alphabetically by title of project.</p> <p><u>Internal Control</u> Use for material pertaining to the effective control over pay & allowances including appropriate internal audit.</p> <p>FILE in chronological sequence.</p>	<p>ect is closed.</p> <p>CMS/PMSD Destroy when no longer needed for reference.</p>	N/A	N/A	
3000	<p><u>RECORDS MANAGEMENT</u> Use for material of a general nature which pertains to the overall paperwork management program.</p> <p>FILE by subject in chronological sequence.</p>	<p>CMS/MSB Destroy when 3 yrs. old.</p>	N/A	Destroy when 1 yr. old.	
3000-1	<p><u>Studies and Survey Reports</u> Use for formal reports of paperwork studies & surveys performed to identify and correct paperwork problems; improve procedures, operating performance & effectiveness, & aid management.</p> <p>FILE alphabetically by agency & subject.</p>	<p>CMS/MSB Destroy when S/O.</p>	N/A	Destroy when S/O.	
3000-2	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE: Case file alphabetically by title of project.</p>	<p>Destroy 1 yr. after the year in which the project is closed.</p>	N/A	Destroy when no longer needed.	GRS-16-5
3010	<p><u>Directives Management</u> Use for material of a general nature which pertains to officially published instructions, regulations, & procedures which regulate & direct operations and performance.</p> <p>FILE by directive number or subject.</p>	<p>CMS/MSB Destroy when 3 yrs old.</p>	N/A	Destroy when 1 yr. old.	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3010-1	<p><u>Departmental Directives</u> Use for directives originated within USDA.</p> <p>a. Departmental Regulations (DR's) and Departmental Manuals (DM's) in the 1000 and 9000 classification series. All others can be destroyed when no longer needed.</p> <p>FILE by series designator, & classification code, and title.</p> <p>b. Secretary's Memorandum (SM's) & any Departmental directives signed by the Secretary.</p> <p>FILE by series designator, & classification code, & title.</p> <p>c. Departmental Notices (DN's), Administrative Regulations, and Internal Office Notices.</p> <p>NOTE: IMD has the record copy of all published Departmental level directives with the exception of Secretary's Memos which are maintained by ECR, NFC Manuals which are maintained by NFC, and the DPM which is maintained by OP.</p> <p>For WORKING Papers and BACKGROUND material, see Policy & Procedure under each category. File external or non-series instructions under the appropriate subject & destroy them when S/O.</p> <p>FILE by series designator, & classification code, & title.</p>	<p>Destroy when S/O.</p> <p>Destroy when S/O.</p> <p>Destroy when no longer needed.</p>	<p>N/A</p> <p>N/A</p> <p>N/A</p>	<p>Destroy when S/O.</p> <p>Destroy when S/O.</p> <p>Destroy when no longer needed.</p>	<p>GRS-16-1c</p>
3010-1-1	<u>ES Directives</u>	CMS/MSB			

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		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3010-1-3	<p>Official issuances, changes, checklists, etc., with supporting papers documenting the important aspects of the issuance, such as those requiring OGC clearances.</p> <p>FILE by series designator, & classification code, & title.</p> <p><u>Distribution, Maintenance & Printing</u> Use for material pertaining to the printing, delivery & storage of ES directives.</p> <p>FILE by issuance number.</p>	<p>PERMANENT Transfer to NARA when 15 yrs. old in 5-yr. blocks.</p> <p>CMS/MSB Destroy when 1 yr. old or when no longer needed.</p>	N/A	N/A	
3010-2	<p><u>Dockets</u> Use for material which has been prepared for publication in the Federal Register & which pertains to the organizational structure & basic policies of the agency.</p> <p>FILE by agency and docket number.</p>	<p>Destroy when 3 yrs. old.</p>	N/A	Destroy when material is published in the Federal Register.	
3020	<p><u>Forms Management</u> Use for general material pertaining to the planning & execution of procedures to standardize, design, construct, & control the use, numbering, & distribution of Extension Service forms.</p> <p>FILE in chronological sequence.</p>	<p>CMS/MSB Destroy when 3 yrs. old.</p>	N/A	Destroy when 3 yrs. old.	
3020-1	<p><u>Forms Master File</u> Use for the record copy of each form created by Extension Service with related instructions & documentation showing inception, scope, & purpose of the form.</p> <p>NOTE: Working papers, background materials requisitions, specifications, processing data, & control records are to be destroyed when related form is discontinued, superseded, or canceled</p>	<p>CMS/MSB Destroy 5 yrs. after related form is discontinued, superseded, or canceled.</p>	N/A	Destroy when S/O.	GRS-16-3a

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3020-1-1	(GRS-16-4b). FILE by form number. <u>Functional Files</u> Use for a collection of forms, arranged by functional classification, used to assist in taking forms management actions such as determining whether new forms should be developed & approved & whether existing forms should be consolidated or replaced by other forms. Included are copies of each form used within the area served by the forms management office. FILE by functional classification.	CMS/MSB Destroy when related form is discontinued, superseded or canceled.	N/A	Destroy when S/O.	
3030	<u>Reports Management</u> Use for material relating to the reports management program. Includes correspondence & index of current recurring or situation reports & a control file of all proposed, currently required, canceled or superseded recurring or situation reports. FILE by report number and title.	CMS/MSB Destroy 2 yrs. after report is discontinued.	N/A	Destroy when 1 yr. old.	GRS-16-6
3031	<u>Public Paperwork Burden Control</u> Use for material pertaining to minimizing the Federal paperwork burden for individuals, small businesses, & State & local governments. FILE by subject in chronological sequence.	CMS Destroy when S/O.	N/A	Destroy when S/O.	
3040	<u>Files Management</u> Use for material of a general nature which pertains to the storage, retention & disposition of records, regardless of the media.	CMS/MSB Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3040-1	<p>FILE by subject in chronological sequence.</p> <p><u>Filing System</u> Use for material pertaining to filing system & techniques evolved to maintain records for retrieval & scheduled disposition.</p> <p>FILE alphabetically.</p>	CMS/MSB Destroy when records are destroyed or when no longer needed for reference.	N/A	Destroy when records are destroyed or when no longer needed for reference.	
3050	<p><u>Mail Management</u> Use for material of a general nature which pertains to management of mail & which does not fit elsewhere in this category.</p> <p>FILE in chronological sequence.</p>	CMS/MSB Destroy when 2 yrs. old.	N/A	Destroy when 2 yrs. old.	GRS-12-2a
3050-1	<p><u>Receipted & Routed Mail</u> Use for material pertaining to the receipt & routing of incoming & outgoing mail handled by the USDA mail & messenger service.</p> <p>a. Records relating to incoming or outgoing registered mail pouches, registered, certified, insured, & special delivery mail including receipts & return receipts.</p> <p>FILE alphabetically by unit & receipt number.</p> <p>b. Application to register & certify mail.</p> <p>FILE alphabetically by unit and receipt number.</p> <p>c. Report of loss, rifling, delay, wrong delivery, or other improper treatment of mail.</p> <p>FILE alphabetically by unit & receipt number.</p>	CMS/MSB			
		Destroy when 1 yr. old.	N/A	Destroy when 1 yr. old.	GRS-12-5a
		Destroy when 1 yr. old.	N/A	Destroy when 1 yr. old.	GRS-12-5b
		Destroy when 1 yr. old.	N/A	Destroy when 1 yr. old.	GRS-12-5c

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		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3050-2	<p><u>Postal Irregularities</u> Use for material pertaining to irregularities in the handling of mail, such as loss or shortages of postage stamps or money orders, or loss or destruction of mail.</p> <p>FILE by subject.</p>	CMS/MSB Destroy 3 yrs. after completion of investigation.	N/A	Destroy 6 mos. after completion of investigation.	GRS-12-8
3050-3	<p><u>Penalty Mail Report Files</u> Use for material pertaining to official penalty mail payment reports.</p> <p>FILE alphabetically by agency.</p>	CMS/MSB Destroy when 6 yrs. old.	N/A	Destroy when 1 yr. old.	GRS-12-7
3050-3-1	<p><u>USPS Quarterly Reports</u> generated through the Official Mail & Accountability System (OMAS)</p> <p>FILE alphabetically by agency.</p>	CMS/MSB Destroy when 6 yrs. old.	N/A		
3050-3-2	<p><u>Computer Printouts</u> (Business Reply Mail penalty, stamps, printed envelopes & USPS Statement of Usage Report) for Extension Service headquarters & the State Cooperative Extension offices.</p> <p>FILE alphabetically by agency.</p>	CMS/MSB Destroy when 6 yrs. old.	N/A		
3051	<p><u>Mailing Lists</u> Use for material pertaining to additions, deletions, & changes to the automated mailing lists.</p> <p>FILE in chronological sequence.</p>	CIT Destroy when S/O.	N/A	Destroy when S/O.	
3070	<p><u>Micrographics Management</u> Use for surveys conducted to evaluate various technological systems, their applications in improving performance, as well as feasibility & cost impact.</p> <p>FILE in chronological sequence.</p>	CMS/MSB Destroy when completed study is 5 yrs. old.	N/A	Destroy when 2 yrs. old.	GRS-16-9

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3080	<p><u>Records Disposition</u> Use for correspondence & material pertaining to descriptive inventories, disposal authorizations, schedules, & reports.</p> <p>FILE in chronological sequence.</p> <p>a. Basic documentation of records, description & disposition programs, including SF-115, Request for Records Disposition Authority; SF-135, Records Transmittal & Receipt; SF-258, Request to Transfer, Approval, & Receipt of Records to National Archives of the U.S.; & related documentation.</p> <p>FILE in chronological sequence.</p> <p>b. Extra copies & routine correspondence and memoranda.</p> <p>FILE in chronological sequence.</p> <p>c. Working papers & background material.</p> <p>FILE SF's by accession number in chronological sequence. Others are filed in chronological sequence.</p>	<p>CMS/MSB Destroy when 3 yrs. old.</p> <p>Destroy when no longer needed for reference.</p> <p>Destroy when no longer needed for reference.</p> <p>Destroy 6 mos. after final action on project report or 3 yrs. after completion of report if no action is taken.</p>	<p>N/A</p> <p>N/A</p> <p>N/A</p> <p>N/A</p>	<p>Destroy when 1 yr. old.</p> <p>Destroy when related records are destroyed or when no longer needed for admin. or reference purposes.</p> <p>Destroy when no longer needed for reference.</p> <p>Destroy 6 mos. after final action on project reports or 3 yrs. after completion of report if no final action is taken.</p>	<p>GRS-16-2a</p> <p>GRS-16-2b</p> <p>GRS-16-3c</p>
3090	<p><u>Vital Records</u> Use for material pertaining to records essential for maintaining the continuity of Govt. activities during a national emergency.</p> <p>FILE by subject.</p>	<p>DA/MGMT Destroy when S/O.</p>	<p>N/A</p>	<p>Destroy when S/O.</p>	
3100	<p><u>MANAGEMENT OF INFORMATION RESOURCES</u></p>	<p>CIT</p>			

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3100-3	Use for material pertaining to the management & control of all types of information resources. FILE in chronological sequence by project. <u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects. FILE Case file alphabetically by title or project.	Destroy when 3 yrs. old. PDE Destroy 1 yr. after the year in which the project is closed.	N/A N/A	Destroy when 1 yr. old. Destroy when no longer needed.	GRS-16-5
3100-4	<u>Feasibility Study Files</u> Use for material pertaining to the study of specific functional areas within 3100 classification. Includes system & data requirements, alternatives, benefits, cost data, & other related documents. FILE by system name.	PDE Destroy when 3 yrs. old.	N/A	Destroy when 2 yrs. old.	
3110	<u>Planning</u> Use for material not directly related to either long-range planning nor capacity planning including: PD annual work plans ad hoc requests; correspondence with external agencies, etc. FILE in chronological sequence.	OA Destroy when no longer needed for reference.	N/A	N/A	
3111	<u>Long-Range Planning</u> Use for material pertaining to Extension Service long-range IRM planning guidance agency LR IRM plans, and correspondence with senior IRM officials. FILE in chronological sequence.	Destroy when no longer needed for reference.	N/A	N/A	
3111-1	<u>ADP Budgets (A-11)</u> Use for annual submission of agency exhibits & narratives for ADP, obligations	CIT Destroy 1 yr. after the close	N/A	Destroy 1 yr. after the close of FY	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3200	<p>& expenditures.</p> <p>FILE in chronological sequence.</p> <p><u>ADP MANAGEMENT</u> Use for material of a general nature which pertains to the study, selection, use, & management control of ADP & word processing equipment, operations, software, & systems. Also includes files relating to machine room operations & to information & data produced through ADP operations which are not described elsewhere in this category.</p> <p>FILE in chronological sequence by project.</p>	<p>of FY covered by the budget.</p> <p>CIT Destroy when 3 yrs. old.</p>	N/A	<p>covered by the budget.</p> <p>Destroy when 1 yr. old.</p>	
3200-2	<p><u>Reports</u> Use for printed final reports containing the statistical, tabulation & an analysis of the findings of a study or survey including a narrative description of methodology employed.</p> <p>FILE by subject in chronological sequence.</p>	<p>Destroy when no longer needed for reference.</p>	N/A	N/A	
3200-3	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE Case file alphabetically by title or project.</p>	<p>Destroy 1 yr. after the year in which the project is closed.</p>	N/A	<p>Destroy when no longer needed.</p>	GRS-16-5
3210	<p><u>Design and Development</u> Use for material of a general nature related to applications design & development.</p> <p>FILE by system name.</p>	<p>PDE Destroy when 3 yrs. old.</p>	N/A	<p>Destroy when S/O.</p>	
3210-1	<p><u>Information Requirements Studies</u> Use for material pertaining to information</p>	<p>PDE Destroy when</p>	N/A	<p>Destroy when no</p>	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3210-2	<p>requirements studies & system development projects. Included are user requests, analytical reports, design requirements, feasibility studies, & cost/benefit analyses.</p> <p>FILE by project name.</p> <p><u>System Implementation Files</u> Use for material pertaining to design, development, & operation of an application system including system instructions, user guides & manuals, input, output, & report specifications, standard operating procedures, block diagrams flow charts, coding instructions, test plans, reference to or copies applicable software & reference materials, job instructions, & similar or related files.</p>	<p>no longer needed.</p> <p>PDE Destroy when no longer needed.</p>	N/A	<p>longer needed.</p> <p>Destroy when no longer needed.</p>	
3230	<p>FILE by project name.</p> <p><u>Resource Utilization</u> Documents containing management data on costs, equipment, staffing, workload capacities, & overall effectiveness of ADP & word processing operations. Includes documents used to evaluate rental, purchase, operation & maintenance costs. Includes reports, briefs, & similar or related documents.</p> <p>FILE by category (equipment, staff, etc.)</p>	<p>CMS/MSB Destroy when 15 yrs. old.</p>	When 5 yrs. old.	Destroy when 2 yrs. old.	
3300	<p><u>TELECOMMUNICATIONS MANAGEMENT</u> Use for material of a general nature pertaining to the transmission, emission, or reception of signals, signs, writing images, sounds, or intelligence of any nature by wire, cable, satellite, fiber optics,</p>	<p>CMS/PMSD/ MSB Destroy when 3 yrs. old.</p>	N/A	Destroy when 1 yr. old.	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3300-2	<p>laser, radio, visual, or other electronic, electric, electromagnetic, or acoustically coupled means.</p> <p>FILE in chronological sequence by project.</p> <p><u>Telecommunications Equipment & Services</u> Use for material of a general nature which pertains to requests for telecommunications equipment & telephone service.</p> <p>FILE by subject.</p>	<p>CMS/PMSD/ MSB Destroy when 3 yrs. old</p>	N/A	Destroy when 1 yr. old.	GRS-12-2b
3300-2-1	<p><u>Request</u> Use for records which pertain to installation, change, removal & servicing of equipment.</p> <p>FILE by subject.</p>	<p>CMS/PMSD/ MSB Destroy 1 yr. after audit or when 3 yrs. old, whichever is sooner.</p>	N/A	Destroy when 1 yr. old.	GRS-12-2d(2)
3300-2-2	<p><u>Agreements</u> Use for records of agreement with background data & other records relating to agreements for telecommunications services.</p> <p>FILE by subject.</p>	<p>CMS/PMSD/ MSB Destroy 2 yrs. after expiration of cancellation of agreement.</p>	N/A	Destroy 2 yrs. after expiration or cancellation of agreement.	GRS-12-2e
3300-2-3	<p><u>Telephone Statistical Reports</u> Use for telecommunications statistical reports including cost & volume data. (Information provided by OIRM.)</p> <p>FILE by chronological sequence.</p>	<p>CMS/PMSD/ MSB Destroy when 1 yr. old.</p>	N/A	N/A	GRS-12-2c
3300-2-4	<p><u>Telecommunications Vouchers</u> Use for telecommunications reference voucher files. Includes reference copies of vouchers, bills, invoices & related records.</p>	<p>CMS/BAD Destroy when 1 FY yr. old.</p>	N/A	N/A	GRS-12-2d(1)

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3300-2-5	FILE by control number. <u>Operational Files</u> Use for material pertaining to telephone log books for orders and CSR's. FILE in chronological sequence.	CMS/PMSD/ MSB Destroy when 6 mos. old.	N/A	N/A	GRS-12-3a
3300-2-6	<u>Telephone Statements</u> Use for statements and toll slips. FILE in chronological sequence.	CMS/BAD Destroy 3 yrs. after period covered by related account.	N/A	Destroy when 1 yr. old.	GRS-3-10
3300-3	<u>Reports</u> Use for telecommunications reports, e.g., transmissions, emission, etc. FILE by subject in chronological sequence.	CMS/PMSD/ MSB Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
3300-4	<u>Project Control</u> Use for memoranda, reports, & other records documenting assignments progress & completion of project. FILE Case file alphabetically by the title of the project.	CMS/PMSD/ MSB Destroy 1 yr. after the year in which the proj- ect is closed.	N/A	Destroy when no longer needed.	GRS-16-5
3310	<u>Voice Telecommunications</u> Use for material pertaining to voice telecommunication policy, management, & operations. This would include DIPS Circulars, requests for technical approval, general information letters, & inventory data sent for verification purposes. FILE by subject.	CMS/PMSD/ MSB Destroy when 3 yrs. old.	N/A	N/A	
3310-1	<u>Telecommunications Technical Approvals</u> Use for requests & all follow-up information gathered in consideration for approval.	CMS/PMSD/ MSB Destroy when no longer needed for	N/A	N/A	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3310-2	FILE by unit. <u>Telephone Orders</u> Copies of telephone orders submitted.	reference. CMS/PMSD/ MSB Destroy when 1 yr. old.	N/A	N/A	
3320	FILE by requisition number. <u>Data Telecommunications</u> Use for material pertaining to policy, management & operation of data communications facilities & services. This includes requests for technical approval for circuits & equipment.	CMS/PMSD/ MSB Destroy when 3 yrs. old.	N/A	N/A	
3320-1	FILE by subject. <u>Data Telecommunications Technical Approvals</u> Use for requests & all follow-up information gathered in consideration for approval.	CMS/PMSD/ MSB Destroy when no longer needed for reference.	N/A	N/A	
3340	FILE by unit/office. <u>Employee Locator Services</u> Use for correspondence, forms & other records pertaining to the compilation of directory service listings.	CMS/PMSD/ MSB Destroy 2 mos. after issuance of listing.	N/A	N/A	GRS-11-3
3400	<u>INFORMATION MANAGEMENT</u> Use for material of a general nature which pertains to the dissemination of information & is not described below.	CIT Destroy when 2 yrs. old or sooner if no longer needed.	N/A	Destroy when 1 yr. old or sooner if no longer needed.	
3400-3	FILE by subject & in chronological sequence. <u>Project Control</u> Use for memoranda, reports & other records, documenting assignments, progress & completion of projects.	CIT Destroy 1 yr. after the year in which the proj-	N/A	Destroy when no longer needed.	GRS-16-5

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3400-4	<p>FILE case file alphabetically by title of project.</p> <p><u>Agency Projects</u> Use for material pertaining to special agency projects, such as information requirements studies & system development projects.</p> <p>FILE by project name.</p>	<p>ect is closed.</p> <p>Destroy when 5 yrs. old.</p>	N/A	Destroy when no longer needed.	
3410	<p><u>Information Collection</u> Use for material pertaining to information collection activities of the Agency.</p> <p>FILE in chronological sequence.</p>	<p>CIT Destroy when no longer needed for reference.</p>	N/A	Destroy when no longer needed.	
3420	<p><u>Information Dissemination</u> Use for material pertaining to dissemination activities of the agency.</p> <p>FILE in chronological sequence.</p>	<p>CIT Destroy when no longer needed for reference.</p>	N/A	Destroy when no longer needed.	
3430	<p><u>Information Sharing Newsletters</u></p> <p><u>Weekly Newsletter from ES</u> Administrator to State Cooperative Extension Directors/Administrators relaying decisions, developments, & events that will be of benefit in the administrative conduct of State Extension programs.</p> <p>FILE by agency and subject.</p>	<p>OA Destroy when 7 yrs. old.</p>	N/A	N/A	
3430-1	<p><u>Yellow Letter</u> from the Administrator regarding administrative, budget, & legislative actions that demand or strongly suggest action by State Extension Directors/Administrators.</p> <p>FILE by agency and subject.</p>	<p>OA Destroy when 7 yrs. old.</p>	N/A	N/A	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3430-2	<u>Pink Letter</u> from the Administrator concerning developments & administrative & program actions that require a response by State Extension Directors/Administrators. FILE by agency and subject.	OA Destroy when 3 yrs. old.	N/A	N/A	
3430-3	<u>White Letter</u> from Administrator concerning administrative and/or program actions & developments. FILE by agency and subject.	OA Destroy when 2 yrs. old.	N/A	N/A	
3430-4	<u>Program Specialists' Newsletters</u> concerning developments that would benefit the State specialists within a given discipline. FILE by agency and subject.	Unit Office Destroy when 2 yrs. old.	N/A	N/A	
3440	<u>Classified & Sensitive Information</u> Use for material pertaining to the administration of security classification of documents. FILE by subject.	CMS/PMSD Destroy when 2 yrs. old.	N/A	Destroy when 2 yrs. old.	GRS-18-1
3440-1	<u>Access to Classified Documents</u> Use for material pertaining to requests & authorization for individuals to have access to classified files. FILE by subject.	Destroy 2 yrs. after authorization expires.	N/A	Destroy 1 yr. after date reply.	GRS-18-6
3450	<u>FOIA and Privacy</u> Use for material of a general nature which applies to FOIA or Privacy Act matters which does not fit in the following categories. File in chronological sequence.	CMS/PMSD Destroy when 2 yrs. old or sooner if no longer needed for administrative use.	N/A	Destroy when S/O.	GRS-14-15 GRS-14-26

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3450-1	<p><u>Freedom of Information Act (FOIA)</u> <u>Requests Files</u> Files created in response to requests for information under the Freedom of Information Act consisting of the original request, a copy of the reply thereto, & all related supporting files which may include official file copy of requested record or copy thereof.</p> <p>a. Correspondence & supporting documents (EXCLUDING the official file copy of the records requested if filed herein).</p> <p>(1) Granting access to all the requested records.</p> <p>(2) Responding to requests for nonexistent records; to requestors who provide inadequate descriptions; & to those who fail to pay agency reproduction fees.</p> <p>(a) Request NOT appealed.</p> <p>(b) Request appealed.</p> <p>(3) Denying access to all or part of the records requested.</p> <p>(a) Request NOT appealed.</p> <p>(b) Request appealed.</p>	<p>Destroy 2 yrs. after date of reply.</p> <p>Destroy 2 yrs. after date of reply.</p> <p>Destroy as authorized under 3450-1-1</p> <p>Destroy 6 yrs. after date of reply.</p> <p>Destroy as authorized</p>	<p>N/A</p> <p>N/A</p> <p>N/A</p> <p>N/A</p> <p>N/A</p>	<p>N/A</p> <p>N/A</p> <p>N/A</p> <p>N/A</p> <p>N/A</p>	<p>GRS-14-11a(1)</p> <p>GRS-14-11a(2)a</p> <p>GRS-14-11a(3)a</p>

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3450-1-1	<p>b. Official file copy of requested records. FILE in chronological sequence.</p>	<p>under 3450-1-1. Destroy in accordance with approved agency disposition instructions for the related records or with the related FOIA request, whichever is later.</p>	N/A	N/A	GRS-14-11b
	<p><u>FOIA Appeals Files</u> Files created in responding to administrative appeals under the FOIA for release of information denied by the agency, consisting of the appellant's letter, a copy of the reply thereto, & related supporting documents, which may include the official file copy of records under appeal or copy thereof.</p> <p>a. Correspondence & supporting documents (EXCLUDING the file copy of the records under appeal if filed herein). FILE in chronological sequence.</p>	<p>Destroy 6 yrs. after final determination by agency or 3 yrs. after final adjudication by courts whichever is later.</p>	N/A	N/A	GRS-14-12a
	<p>b. Official file copy of records under appeal. FILE in chronological sequence.</p>	<p>Destroy in accordance with approved agency disposition instruction for the related</p>	N/A	N/A	GRS-14-12b

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3450-1-2	<p><u>FOIA Control Files</u> Files maintained for control purposes in responding to requests, including registers & similar records listing date, nature, & purpose of request & name & address of requestor.</p> <p>a. Register or listing. FILE in chronological sequence.</p> <p>b. Other files FILE in chronological sequence.</p>	record, or with the related FOIA request, whichever is later.			
		<p>Destroy 6 yrs. after date of last entry.</p> <p>Destroy 6 yrs. after final action by the agency or agency final adjudication by courts, which- ever is later.</p>	N/A	N/A	GRS-14-13a
3450-1-3	<p><u>FOIA Reports Files</u> Recurring reports & one-time information requirements relating to the agency implementation of the Freedom of Information Act, including annual reports to the Congress.</p> <p>a. Annual reports at agency level.</p> <p>b. Other reports FILE in chronological sequence.</p>				
		<p>Destroy when 2 yrs. old or sooner if no longer needed for admin. use.</p> <p>Destroy when 2 yrs. old or sooner if no longer needed for adminis-</p>	N/A	N/A	GRS-14-14

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3450-2	<p><u>Privacy Act Request Files</u> Files created in response to requests from individuals to gain access to their records or to any information in the records pertaining to them, as provided for under 5 U.S.C. 552a(d)(1). Files contain original request, copy of reply thereto, & all related supporting documents, which may include the official file copy of records requested or copy thereof.</p> <p>a. Correspondence & supporting documents (EXCLUDING the official file copy of the records requested if filed herein).</p> <p>(1) Granting access to all the requested records.</p> <p>(2) Responding to requests for nonexistent records; to requestors who provide inadequate descriptions; & to those who fail to pay agency reproduction fees.</p> <p>(a) Requests NOT appealed.</p> <p>(b) Requests appealed.</p> <p>(3) Denying access to all or part of the records requested.</p> <p>(a) Request NOT appealed.</p>	<p>trative use.</p> <p>CMS/PMSD</p>			
		<p>Destroy 2 yrs. after date of reply.</p>	N/A	<p>Destroy 1 yr. after date of reply.</p>	<p>GRS-14-21(a)1</p>
		<p>Destroy 2 yrs. after date of reply.</p>	N/A	<p>Destroy when 1 yr. old.</p>	<p>GRS-14-21(a)2(a)</p>
		<p>Destroy as authorized under 3450-2-1.</p>	N/A	N/A	<p>GRS-14-21a(2)(b)</p>
	<p>(a) Request NOT appealed.</p>	<p>Destroy 5 yrs.</p>	N/A	<p>Destroy when 3</p>	<p>GRS-14-</p>

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Classi- fication Number	Description and Filing Instructions	Disposition				
		Record Office		Other Offices	Disposition Authority	
		OPI & Disposition	To WNRC			
(1)	(2)	(3)	(4)	(5)	(6)	
3450-2-1	(b) Requests appealed.	after date of reply. Destroy as authorized under 3450-2-1.	N/A	N/A	yrs. old. N/A	21a(3)(a) GRS-14-21a(3)(b)
	b. Official file copy of requested records. FILE in chronological sequence.	Destroy in accordance with approved agency disposition instructions for the related records, or with the related Privacy Act request, whichever is later. CMS/PMSD	N/A	N/A	N/A	GRS-14-21-(b)
	<u>Privacy Act Amendment Case Files</u> Files relating to an individual's request to amend a record pertaining to that individual as provided for under 5 U.S.C. 552a(d)(2); to the individual's request for a review of an agency's refusal of the individual's request to amend a record as provided for under 552a(d)(3); & to any civil action brought by the individual against the refusing agency as provided under 5 U.S.C. 552a(g). a. Requests to amend agreed to by agency. Includes individual's requests to amend and/or review refusal to amend, copies of agency's replies thereto, & related materials.	Destroy in accordance with the approved disposition instructions for the related subject individual's	N/A	N/A	N/A	GRS-14-22(a)

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3450-2-2	<p>b. Requests to amend refused by agency. Includes individual's requests to amend & review refusal to amend, copies of agency's replies thereto, statement of disagreement, agency justification for refusal to amend a record, & related materials.</p> <p>c. Appealed requests to amend. Includes all files created in responding to appeals under the Privacy Act for refusal by any agency to amend a record.</p> <p>FILE in chronological sequence.</p> <p><u>Privacy Act Accounting of Disclosure Files</u> Files maintained under the provisions of 5 U.S.C. 552a(c) for an accurate accounting of the date, nature, & purpose of each disclosure of record to any person or to</p>	<p>record or 4 yrs. after agency's agreement to amend, whichever is later.</p> <p>Destroy in accordance with the approved disposition instructions for the related subject individual's record 4 yrs. after final determination by agency or 3 yrs. after final adjudication by courts, whichever is later.</p>	N/A	N/A	GRS-14-22(b)
		<p>Destroy in accordance with approved disposition instructions for the related subject individual's record or 3 yrs. after final adjudication by courts, whichever is later.</p>	N/A	N/A	GRS-14-22c
		<p>Destroy in accordance with the approved</p>	N/A	N/A	GRS-14-23

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
3450-2-3	<p>another agency, including forms for showing the subject individual's name, requestor's name & address, purpose & date of disclosure, & proof of subject individual's consent when applicable.</p> <p>FILE in chronological sequence.</p> <p><u>Privacy Act Control Files</u> Files maintained for control purposes in responding to requests, including registers & similar records listing date, nature of request, & name & address of requestor.</p> <p>a. Registers or listings.</p>	<p>disposition instructions for the related subject individual's records, or 5 yrs. after the disclosure for which the accountability was made, whichever is later.</p> <p>CMS/PMSD</p>			
	<p>b. Other files</p> <p>FILE in chronologically sequence.</p>	<p>Destroy 5 yrs. after date of last entry.</p> <p>Destroy 5 yrs. after final action by the agency or final adjudication by courts, whichever is later.</p>	N/A	N/A	GRS-14-24a
3450-2-4	<p><u>Privacy Act Reports Files</u> Recurring reports & one-time information requirement relating to agency implementation, including annual reports to the Congress of United States, the Office of Management & Budget, & the Report on New Systems.</p> <p>a. Annual reports at Departmental or agency level.</p>	<p>CMS/PMSD</p> <p>Destroy when 2 yrs. old.</p>	N/A	N/A	GRS-14-25

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4000	FILE in chronological sequence.				
	<p><u>EMPLOYMENT</u> Use for material pertaining to the general administration & operation of personnel functions, including college programs, selective placement, special programs, examination & paid recruitment, etc.</p> <p>FILE by Employee's name.</p> <p><u>Official Personnel File</u> a. Documents placed on the right-side of the folder constitute the record of an employee's status & service & travel with employee throughout his/her career. The documents & their order of filing are prescribed by FPM 293-31.</p>	<p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	Destroy when 1 yr. old.	GRS-1-3
	<p>b. Temporary - Documents placed on the left-hand side of the folder constitute the temporary records of an employee. The documents & their order of filing are prescribed by FPM 293-31.</p>	<p>CMS/PMSD Transfer folder to National Personnel Records Ctr. St. Louis, MO. 30 days after separation (see note 2) DPRC will destroy 65 yrs. after separation from Fed. service.</p>	N/A	See Note	GRS-1-1b
	<p>c. All letters of reprimand, caution, warning, and/or admonishment.</p>	<p>CMS/PMSD Destroy upon separation or transfer of employee or when 1 yr. old, whichever is sooner.</p> <p>CMS/PMSD Minimum of 1 yr. (unless decided unwarranted), or until employee</p>	N/A	See Note	GRS-1-10
				N/A	N/A

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
	<p>d. Service Record Card (SF-7)</p> <p>NOTE: For supervisors' personnel files with material pertaining to authorizations, pending actions, request for actions & records on individual employees duplicated in or not appropriate for the official personnel folder, review annually & destroy superseded or obsolete documents, or destroy all documents relating to an individual employee 1 yr. after separation or transfer. (GRS-1-18a)</p> <p>FILE by nature of action & not by employee's name.</p>	<p>transfers or separates, whichever occurs first.</p> <p>CMS/PMSD Destroy 3 yrs. after separation or transfer of employee.</p>	N/A	N/A	GRS-1-2b
4000-2	<p><u>Reports</u> Use for statistical reports relating to USDA personnel programs & functions & manpower management & evaluation.</p> <p>FILE by agency & subject report.</p>	<p>CMS/PMSD Destroy when 2 yrs. old.</p>	N/A	Destroy when 2 yrs. old.	GRS-1-16
4000-3	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE case file alphabetically by title of project.</p>	<p>CMS/PMSD Destroy 1 yr. after the yr. in which project is closed.</p>	N/A	Destroy when no longer needed.	GRS-16-5
4010	<p><u>Recruitment, Selection & Placement</u> Use for material of a general nature which pertains to recruitment efforts & job offers</p>	<p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	Destroy when 3 yrs. old.	GRS-1-3

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4010-1	<p>to potential employees.</p> <p>FILE in chronological sequence.</p> <p><u>Recruitment</u> Use for material which pertains to recruitment efforts, e.g., college recruitment, USDA's recruitment exhibits, job fairs, career days, College Placement Assoc., paid advertising, & vacancy announcements outside USDA. Additionally includes letters of thanks to universities & other recruitment sources for their cooperation or letters advising universities, etc., of selections due to recruitment efforts.</p>	CMS/PMSD Destroy when 3 yrs. old.	N/A	N/A	
4010-1-2	<p>FILE chronologically by organizations, etc.</p> <p><u>Agency Recruitment Plans</u> Use for correspondence & material pertaining to annual recruitment plans as required by Departmental Regulations.</p>	CMS/PMSD Destroy when no longer needed for reference.	N/A	N/A	
4010-1-3	<p>FILE in chronological sequence.</p> <p><u>Career Literature & Information</u> Use for material pertaining to correspondence & recommended changes on recruiting literature. Includes requests from agencies to review their literature. Additionally, requests are received from publishers, to review their literature.</p>	CMS/PMSD Destroy when no longer needed for reference.	N/A	N/A	
4010-2	<p>FILE in chronological sequence.</p> <p><u>Selection</u> Use for material which pertains to employment offers & acceptance or rejection of those offers. (Destroy accepted offers immediately GRS-1-4a)</p>	CMS/PMSD			

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4010-3	Declined offers.				
	a. Names received from certificate of eligible.	Return to OPM with reply & application.	N/A	Destroy immediately	GRS-1-4b(1)
	b. Temporary or excepted appointments	File per FPM 333, A-4.	N/A	Destroy immediately	GRS-1-4b(2)
	c. All others	Destroy immediately	N/A	Destroy immediately	GRS-1-4b(3)
	FILE in chronological sequence.				
	<u>Competitive Placement</u> Use for SF-171's resumes, position announcements, & applicant ratings & any other material which documents competitive appointment procedures as required by OPM. FILE by announcement number.	CMS/PMSD Destroy upon receipt of OPM inspection report or when 2 yrs. old whichever is earlier, providing the requirements of FPM, Chapt. 333, Sect. A-4 are observed.	N/A	N/A	GRS-1-15
4010-4	<u>Interviews</u> Use for material pertaining to interviews with employees. FILE alphabetically by employee.	CMS/PMSD Destroy 6 mo. after transfer or separation of employee.	N/A	Destroy immediately	GRS-1-8
4010-5	<u>Certificate of Eligible</u> Use for copies obtained from OPM of certificates of eligible with related requests, forms, correspondence, & statement of reasons for passing over preference eligible & selecting a nonpreference eligible. FILE by announcement or position number.	CMS/PMSD Destroy when 2 yrs. old.	N/A	N/A	GRS-1-5

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4010-6	<p><u>Reemployment Agreements</u> Use for material which pertains to reemployment agreements between employees & USDA.</p> <p>FILE by employee name.</p>	<p>CMS/PMSD Destroy 1 yr. after termination of agreement.</p>	N/A	Destroy 1 yr. after termination of agreement.	
4010-7	<p><u>Reports</u> Use for statistical reports which pertain to recruitment, selection, & placement, e.g., selected special employment programs, workertrainee, Federal Jr. Fellowship, Stay-in-school, summer aides, etc.</p> <p>FILE by subject.</p>	<p>CMS/PMSD Destroy when 2 yrs. old.</p>	N/A	Destroy 2 yrs. old.	GRS-1-16
4020	<p><u>Personnel Actions</u> Use for notification of personnel actions e.g., within grade increases, restored leave, promotion, etc., EXCLUSIVE of those in OPF.</p> <p>a. Pay or fiscal copy.</p> <p>FILE by social security number & in chronological sequence.</p>	<p>CMS/PMSD Destroy 2 yrs. old.</p> <p>CMS/BAD Destroy when related pay records are audited by GAO or when 3 yrs. old, whichever is sooner.</p>	N/A	Destroy when 1 yr. old.	GRS-1-14a&b
4030	<p><u>Selective Placement Programs</u> Use of material of a general nature pertaining to special programs not listed elsewhere in this category.</p> <p>FILE by subject.</p>	<p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	N/A	
4030-1	<p><u>Priority Placements</u> Use for material which pertains to the repromotion of downgraded employees.</p> <p>FILE by social security number.</p>	<p>CMS/PMSD Destroy after employee has been promoted or declines a</p>	N/A	N/A	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4030-2	<p><u>Priority Consideration</u> Use for material which pertains to priority consideration given to employees due to their being downgraded or due to an administrative oversight.</p> <p>FILE by position and name.</p>	<p>position. CMS/PMSD Destroy when 2 yrs. old or when a depart Pers. Mgmt. Eval. review conducted.</p>	N/A	N/A	
4030-3	<p><u>Special Programs</u> Use for material pertaining to the included but not limited to special employment programs listed. Files include instructions, plans, & reports.</p> <p>FILE by subject.</p>	<p>CMS/PMSD Destroy when 5 yrs. old.</p>	N/A	N/A	
4030-3-1	<p><u>Cooperative Education Program</u></p>	Same as 4030-3	Same as 4030-3	Same as 4030-3	
4030-3-2	Stay in school	"	"	"	
4030-3-3	Federal Junior Fellowship Program	"	"	"	
4030-3-4	<p>Intergovernmental Personnel Act Program Records relating to the temporary assignments of employees under the IPA (P.L. 91-648) as amended by the Civil Service Reform Act of 1978 (P.L. 95-454).</p> <p>a. Assignment Agreement, OF-69, Assignee Evaluation of Mobility Assignments Under Title IV of the Intergovernmental Personnel Act of 1970, AD-490; and Service Agreements, ES Employees (1) Personnel Div. (2) Servicing Personnel Office Non-ES Employees (3) Personnel Div. & Servicing Personnel Office.</p>	"	"	"	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
	b. General correspondence, forms & other records relating to the IPA assignments, not covered elsewhere in this schedule.				
4030-3-4a	Evaluations Intergovernmental Personnel Program	"	"	"	
4030-3-5	Part-time Employment Program	"	"	"	
4030-3-6	Presidential Mgmt. Intern Program	"	"	"	
4030-3-7	Selective Placement Program for Handicapped Employees	"	"	"	
4030-3-7-1	General	"	"	"	
4030-3-7-2	Plans	Same as 4030-3.	Same as 4030- 3.	Same as 4030-3.	
4030-3-7-3	Reports	"	"	"	
4030-3-7-3a	Narrative	"	"	"	
4030-3-7-3b	Statistical	"	"	"	
4030-3-7-4	NETH Week (National Employee the Handicapped Week)	"	"	"	
4030-3-8	Faculty Programs	"	"	"	
4030-3-9	Summer Employment Program	"	"	"	
4030-3-9a	USDA Competitive Programs	"	"	"	
4030-3-9b	Summer Youth Employment Program (w/D.C. Government)	"	"	"	
4030-3-10	Student Volunteer Program	"	"	"	
4030-3-11	Volunteer Program	"	"	"	
4030-3-12	Veterans Program	"	"	"	
4030-3-13	Worker-Trainee Opportunities Program	"	"	"	
4030-3-14	Collateral Assignments	"	"	"	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4030-3-15	Federally Employed Women	"	"	"	
4030-3-15-1	Women's Equality Day	"	"	"	
4030-3-15-2	Women's Week	"	"	"	
4030-3-16	Hispanic Employment Program	"	"	"	
4030-3-16-1	National Hispanic Week	"	"	"	
4040	<p><u>Special Appointments</u> Use for material pertaining to appointments requiring Senatorial confirmation.</p> <p>Folders covering period of employment terminated after December 31, 1920, excluding those selected by the National Archives & Records Admin. for permanent retention.</p> <p>(1) Transferred employees.</p> <p>(2) Separated employees FILE in chronological sequence.</p>	<p>OP</p> <p>See FPM for instructions relating to folders of employees transferred to another agency.</p> <p>Transfer folder to National Personnel Records Ctr (CPR) St. Louis, Mo. 30 days after separation. NPRC will destroy 65 yrs. after separation from Federal Service.</p>	<p>N/A</p> <p>N/A</p>	<p>N/A</p> <p>N/A</p>	<p>GRS-1-1a</p> <p>GRS-1-1b</p>
4040-1	<u>Special Authorities</u>	CMS/PMSD			

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4040-1-1	Use for material pertaining to correspondence, bulletins, etc., received which relate to excepted service (Schedules, A, B, & C). FILE in chronological sequence. <u>Schedule B/Pace</u> Use for material pertaining to the use of Schedule B in lieu of Pace. FILE in chronological sequence.	Destroy when S/O. CMS/PMSD Destroy when S/O.	N/A N/A	N/A N/A	
4050	<u>Position Classification, Pay & Allowances</u> Use for material of a general nature which pertains to position classification, pay & allowances which does not fit elsewhere in this category. FILE by subject in chronological sequence.	CMS/PMSD Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
4050-1	<u>Position Classification</u> Use for material which substantiates eligibility & classifying of jobs by occupation, series, class, & grades. FILE by position number.	CMS/PMSD Destroy 2 yrs. after position is abolished or description is superseded.	N/A	Destroy when position is abolished or description is superseded.	GRS-1-7b
4050-2	<u>Audits and Surveys</u> Use for material pertaining to surveys, desk & other position audits. FILE by subject.	CMS/PMSD Destroy when S/O.	N/A	Destroy when S/O.	GRS-1-7c(2)
4050-3	<u>Personnel Management Evaluation</u> Use for personnel management evaluation reports, supporting documents, compliance responses, etc. FILE by subject.	CMS/PMSD Destroy when S/O.	N/A	Destroy when S/O.	
4050-4	<u>Position Identification Strips (SF-70)</u> Use for material which provides summary data on each position occupied.	CMS/PMSD Destroy when superseded or	N/A	N/A	GRS-1-11

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4060	<p>FILE chronologically.</p> <p><u>Employee Benefits</u> Use for material of a general nature which pertains to insurance, annuities, compensation & other employee benefits.</p> <p>NOTE: For injury compensation, see 4430-2.</p> <p>FILE by subject in chronological sequence.</p>	<p>obsolete.</p> <p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	Destroy when 1 yr. old.	
4060-1	<p><u>Insurance</u> Use for material pertaining to insurance deductions. Includes copies of vouchers & schedules of payment.</p> <p>NOTE: Executed documents by employee, e.g. SF's 2809, 2810, & 2817, are maintained in the OPF as a PERMANENT record.</p> <p>FILE by employee name.</p>	<p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	Destroy when 1 yr. old.	GRS-2-20
4060-2	<p><u>Annuity Estimates</u> Use for material pertaining to annuity estimates, & other records used to assist retiring employees or survivors claim insurance or retirement benefits.</p> <p>FILE alphabetically by employee.</p>	<p>CMS/PMSD Destroy when 1 yr. old.</p>	N/A	N/A	GRS-1-39
4060-3	<p><u>Reports</u> Use for reports which pertain to insurance, annuities, compensation & other employee benefits.</p> <p>FILE by subject.</p>	<p>CMS/PMSD Destroy when 3 yrs. old or after GAO audit whichever is sooner.</p>	N/A	N/A	GRS-2-22c
4070	<p><u>Attendance and Leave</u> Use for general material pertaining to duty hours, authorized absence, & use of leave.</p>	<p>CMS/PMSD Destroy when 1 yr. old.</p>	N/A	Destroy when 1 yr. old.	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition							
		Record Office		Other Offices	Disposition Authority				
		OPI & Disposition	To WNRC						
(1)	(2)	(3)	(4)	(5)	(6)				
4070-1	Includes annual, sick, military leave, leave without pay, holidays, absence for jury duty, etc. includes requests for & approval of taking leave.	CMS/PMSD Destroy when 3 yrs. old.	N/A	Destroy at end of following pay period.	GRS-2-6a				
	a. If timecard has been initialed by the employee.					Destroy at end of following pay period.			
	b. If timecard has not been initialed by the employee.								
4080	NOTE: See 2600-2-1 for T&A files. FILE by subject. <u>Leave History</u> Use for material which pertains to leave balances, e.g., leave balances upon separation, restored leave, leave without pay, military leave, annual leave ceiling, & leave audits, etc. FILE by social security number.	CMS/PMSD Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	GRS-2-6b				
4080-1	<u>Reduction-in-Force</u> Use for correspondence which pertains to notice of reduction-in-force & non-disciplinary removals. FILE in OPF.					CMS/PMSD Destroy when 5 yrs. old.	N/A	Destroy 3 mos. after end of the period covered.	GRS-2-9a&b
4080-2	<u>Reemployment Consideration</u> For USDA employees separated by RIF; Bulletins, information on automated lists & requests for passover, are included in this category. FILE by subject in chronological sequence.								
4080-2	<u>Reduction-in-Force Inquiries</u> Use for general correspondence & congressional inquiries generated as a result of RIF's.	CMS/PMSD Destroy when action is completed.	N/A	N/A	GRS-1-17a				
								Destroy when 1 yr. old.	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4080-3	<p>FILE by subject in chronological sequence.</p> <p><u>Reports</u> Use for USDA & other agencies informational outplacement assistance efforts for employees separated by reduction-in-force.</p>	<p>completed.</p> <p>CMS/PMSD Destroy when 5 yrs. old.</p>	N/A	N/A	
4090	<p>FILE by subject in chronological sequence.</p> <p><u>Employee Responsibilities and Conduct</u> Use for material pertaining to codes of ethics and standards of conduct.</p> <p>FILE in chronological sequence.</p>	<p>CMS/PMSD Destroy when S/O.</p>	N/A	Destroy when S/O.	GRS-1-27
4100	<p><u>EMPLOYEE DEVELOPMENT, PERFORMANCE AND UTILIZATION</u> Use for material of a general nature which pertains to the development of employees through training, job enrichment, Upward Mobility, & Executive Development Programs. Also includes performance evaluation & awards.</p> <p>FILE by subject.</p>	<p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	Destroy when 3 yrs. old.	
4100-2	<p><u>Reports</u> Use for material which pertains to reports on employee development, training, evaluation, awards, etc.</p> <p>FILE by agency and subject.</p>	<p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	Destroy when 1 yr. old.	
4100-3	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE Case file alphabetically by title of project.</p>	<p>CMS/PMSD Destroy 1 yr. after the yr. in which the project is closed.</p>	N/A	Destroy when no longer needed.	GRS-16-5

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4110	<p><u>Orientation</u> Use for material pertaining to the introduction of employees to new surroundings and/or new groups of persons to enable the employee to adjust to unfamiliar surroundings, employment, or the like.</p> <p>FILE by subject in chronological sequence.</p>	<p>CMS/PMSD Destroy when S/O.</p>	N/A	N/A	
4120	<p><u>Training</u> Correspondence, memoranda, agreements, authorizations, reports, requirements, reviews, plans, & objectives relating to the establishment & operation of training courses & conferences. (Destroy background & working papers when 3 yrs. old (Grs-1-29b)).</p> <p>FILE by subject in chronological sequence.</p>	<p>CMS/PMSD Destroy when 5 yrs. old or 5 yrs. after completion of a specific training program.</p>	N/A	Destroy when 1 yr. old.	GRS-1-29a(1)
4120-2	<p><u>Availability and Participation</u> Use for material which pertains to availability of training & employee participation. Background and working papers. Destroy when 3 yrs. old.</p> <p>NOTE: The record of satisfactory course completion is kept in the OPF.</p> <p>FILE by course subject, or alphabetically as applicable.</p>	<p>CMS/PMSD Destroy when 5 yrs. old or when S/O whichever is sooner.</p>	N/A	Destroy when 1 yr. old.	GRS-1-29b
4130	<p><u>Incentives and Awards</u> Use for material including recommendations approved nominations, memoranda, correspondence, reports & related handbooks pertaining to agency-sponsored cash & non-cash awards such as incentive awards within grade merit increases, suggestions, & outstanding performance.</p>	<p>CMS/PMSD Destroy 2 yrs. after approval or disapproval.</p>	N/A	Destroy 2 yrs. after approval or disapproval.	GRS-1-12a(1)

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4130-1	<p>FILE case file by subject.</p> <p><u>Letter of Commendation/Appreciation</u> Use for copies of letters recognizing length of service & retirement & letters of appreciation & commendation for performance. EXCLUDING copies filed in OPF.</p>	CMS/PMSD Destroy when 2 yrs. old.	N/A	Destroy when 2 yrs. old.	GRS-1-12c
4130-2	<p>FILE by subject in chronological sequence.</p> <p><u>Service and Sick Leave Awards</u> Use for material including correspondence memoranda, reports, computations of service & sick leave, & list of awardee.</p>	CMS/PMSD Destroy when 1 yr. old.	N/A	Destroy when 1 yr. old.	GRS-1-12b
4130-3	<p>FILE in OPF.</p> <p><u>Departmental Awards</u> Department level awards or higher (Secretary's Awards, Presidential, etc.)</p>	CMS/PMSD Destroy when no longer needed.	N/A	N/A	
4130-4	<p>FILE in OPF.</p> <p><u>External Awards</u> External awards & nominations from or to other government agencies or private organizations.</p>	CMS/PMSD Destroy when 2 yrs. old.	N/A	Destroy when 2 yrs. old.	GRS-1-12a
4140	<p><u>Performance Evaluations</u> a. Non-SES appointees (as defined in 5 USC 4301 (2).) (1) Appraisals of unacceptable performance, where a notice of proposed demotion or removal is issued but not affected, & all related documents.</p>	CMS/PMSD Destroy after the employee completes 1 yr. of acceptable performance from the date of written advance notice of	N/A	Supervisor's file copy only. Destroy after the employee completes 1 yr. of acceptable performance.	GRS-1-23a(1)

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		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
		proposed removal or reduction in grade notice.			
	(2) Performance records superseded through an administrative, judicial, or quasi-judicial procedure.	Destroy when superseded.	N/A	Destroy upon supersession.	GRS-1-23a(2)
	(3) Performance-related records pertaining to a former employee.	Destroy when 3 yrs. old or when no longer needed, which is sooner.	N/A	Destroy when employee leaves employment.	GRS-1-23a(3)
	(4) All other summary performance appraisals records, including performance appraisals & job elements & standards upon which they are based.	Destroy 3 yrs. after date of appraisal.	N/A	Destroy 3 yrs. after date of appraisal.	GRS-1-23a(4)
	(5) Supporting documents. FILE in Employee's Performance File.	Destroy 3 yrs. after date of appraisal or when no longer needed, whichever is sooner.	N/A	Destroy when 3 yrs. old.	GRS-1-23a(5)
	b. SES appointees (as defined in 5 USC 3132a(2)).	CMS/PMSD			
	(1) Performance records superseded through an administrative, judicial, or quasi-judicial procedure. FILE in OPF.	Destroy when S/O.	N/A	Destroy when S/O.	GRS-1-23b(1)
	(2) Performance-related records pertaining to a former SES appointee. FILE in Employee's Performance File.	Destroy 5 yrs. old, or when no longer needed, whichever is sooner.	N/A	Destroy when employee leaves employment	GRS-1-23b(2)
	(3) All other performance appraisals,	Destroy 5 yrs.	N/A	Destroy 5 yrs. after	GRS-1-23b(3)

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		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4200	<p>along with job elements & standards (job expectations) upon which they are based.</p> <p>FILE in Employee's Performance File.</p> <p>(4) Supporting documents</p> <p>FILE in Employee's Performance File.</p> <p>c. Presidential appointees.</p> <p>FILE in Employee's Performance File.</p> <p><u>PERSONNEL RELATIONS AND SERVICES</u></p> <p>Use for general material which pertains to grievances, complaints, & appeals, other than EEO. Also use for rehabilitation programs (e.g., for alcoholism), for employee organizations, & for such special services as day care.</p> <p>FILE by subject.</p>	<p>after date of appraisal, exclusive of any interim service as a Presidential appointee.</p> <p>Destroy 5 yrs. after date of appraisal or when no longer needed, whichever is sooner.</p> <p>Destroy 5 yrs. after appt. expires.</p> <p>CMS/PMSD Destroy when 5 yrs. old.</p>	<p>N/A</p> <p>N/A</p> <p>N/A</p>	<p>date of appraisal.</p> <p>Destroy 5 yrs. after date of appraisal or when no longer needed, whichever is sooner.</p> <p>Destroy when employee leaves employment.</p> <p>Destroy when 1 yr. old.</p>	<p>GRS-1-23b(4)</p>
4200-2	<p><u>Reports</u></p> <p>Use for material which pertains to grievances & complaints & appeals other than EO.</p> <p>FILE by subject.</p>	<p>CMS/PMSD Destroy no sooner than 4 yrs. old, but no later than 7 yrs. after case is closed.</p>	<p>N/A</p>	<p>Destroy when 1 yr. old.</p>	<p>GRS-1-30a</p>
4200-3	<p><u>Project Control</u></p> <p>Use for memoranda, reports & records documenting assignments, progress &</p>	<p>CMS/PMSD Destroy 1 yr. after the yr. in</p>	<p>N/A</p>	<p>Destroy when no longer needed.</p>	<p>GRS-16-5</p>

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4210	<p>completion of projects.</p> <p>FILE Case file alphabetically by title of project.</p> <p><u>Grievance Procedures</u> Use for material which pertains to the necessary procedures to take when an employee has grounds for complaint.</p> <p>FILE in chronological sequence.</p>	<p>which the project is closed.</p> <p>CMS/PMSD Destroy when S/O.</p>	N/A	Destroy when S/O.	
4210-1	<p><u>Grievances and Complaints</u> Use for material originating in the review of grievance & appeals raised by agency employees, except EEO complaints. These case files include statements of witnesses, reports of interviews & hearings, examiner's findings & recommendations, a copy of the original decision, related correspondence & exhibits, & records relating to a reconsideration request.</p> <p>FILE by employee name.</p>	<p>CMS/PMSD Destroy no sooner than 4 yrs. but no later than 7 yrs. after case is closed.</p>	N/A	Destroy 1 yr. after case is closed.	GRS-1-30a
4210-2	<p><u>Adverse Actions and Appeals</u> Use for case files & related records created in reviewing an adverse action (disciplinary or nondisciplinary removal, suspension, leave without pay, reduction-in-force) against an employee. The file includes a copy of the proposed adverse action with supporting papers; statements of witnesses; employee's reply; hearing notices, reports & decisions; reversal of action; & appeal records, EXCLUDING letters of reprimand.</p> <p>FILE by subject in chronological sequence.</p>	<p>CMS/PMSD Destroy no sooner than 4 yrs. but no later than 7 yrs. after case is closed.</p>	N/A	Destroy 1 yr. after case is closed.	GRS-1-30b
4230	<p><u>Special Activities and Programs</u> Use for material of a general nature which</p>	<p>CMS/PMSD Destroy when</p>			

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		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4230-1	<p>pertains to the unique activities & program instituted, e.g. Federal Combined Campaign & which do not fit in any other category.</p> <p>FILE by subject in chronological sequence.</p> <p><u>Employees Services</u> Use for material pertaining to creating, planning, coordinating & directing of social programs & organizations, (e.g., day care centers & programs for alcoholism & drug abuse).</p> <p>FILE by subject.</p>	<p>no longer needed for reference.</p> <p>CMS/PMSD Destroy when 3 yrs. old.</p>	N/A	N/A	
4230-3	<p><u>Counseling Records</u> Use for reports of interviews, analyses, and related records.</p> <p>FILE alphabetically by employee's name.</p>	<p>CMS/PMSD Destroy 3 yrs. after termination of counseling.</p>	N/A	Destroy 1 yr. after termination of counseling.	GRS-1-26a
4300	<p><u>EQUAL OPPORTUNITY</u> Use for material of a general nature which pertains to the Civil Rights Act Regulations of 1964, the EEO Act of 1972, pertinent future legislation, & agency EEO Committee meetings & records including minutes & reports.</p> <p>FILE in chronological sequence.</p>	<p>EOS Destroy when 3 yrs. old or when S/O whichever is applicable.</p>	N/A	Destroy when 1 yr. old or when S/O whichever is applicable.	GRS-1-25g
4300-3	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE Case file alphabetically by title of project.</p>	<p>Destroy 1 yr. after the yr. in which the project is closed.</p>	N/A	Destroy when no longer needed.	GRS-16-5
4310	<p><u>Affirmative Action</u> Use for material which pertains to agency</p>	<p>EOS Destroy 5 yrs.</p>	N/A	Destroy 5 yrs. from	GRS-1-25h(1) &

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4310-1	<p>actions or plans to correct inequities.</p> <p>FILE in chronological sequence.</p> <p><u>Affirmative Action Program</u> Use for material pertaining to onsite reviews, & the annual report of accomplishments.</p>	<p>from date of plan.</p> <p>EOS Destroy 5 yrs. from date of report.</p>	N/A	<p>date of plan or when administrative purposes have been served, whichever is sooner.</p> <p>Destroy 5 yrs. from date of report.</p>	(2) GRS-1-25h(3) & (4)
4320	<p>FILE in chronological sequence.</p> <p><u>Complaint Investigations</u> a. Use for official discrimination complaint file with related correspondence, reports, exhibits, withdrawal notices, copies of decisions, records of hearings & meetings, & other records as described in 29 CFR 1613.222. Cases resolved within the agency by EEOC, or by a U.S. Court.</p> <p>FILE by employee name.</p> <p>b. Use for background material not filed in official complaint case files.</p>	<p>EOS Destroy 4 yrs. after resolution of case.</p> <p>Destroy 2 yrs. after final resolution of case.</p>	N/A	<p>Destroy 1 yr. after resolution of case.</p> <p>N/A</p>	GRS-1-25 (a) (b) GRS-1-25c
4330	<p>FILE by subject in chronological sequence.</p> <p><u>Compliance</u> Use for material pertaining to reviews, background papers & correspondence which relate to contractor employment practices.</p> <p>NOTES: For EEO Compliance reports, see 4300-2.</p>	<p>CMS/MSB Destroy when 7 yrs. old.</p>	When 3 yrs. old	N/A	GRS-1-25d(1)
4340	<p>FILE by origin in chronological sequence.</p> <p><u>Civil Rights Impact Statements</u></p>	EOS			

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4350	<p>Use for material pertaining to OEO responses to agency proposals (reorganizations, office relocations, budgets, legislation, administrative regulations & environmental impact statements) that may have civil rights implications.</p> <p>FILE by agency.</p> <p><u>Equal Opportunity in Housing</u> Use for material related to the implementation of a Department of Housing & Urban Development/Department of Agriculture Memorandum of Understanding relating to the implementation of Title VIII of the Civil Rights Act of 1968.</p> <p>FILE in chronological sequence.</p>	<p>Destroy when 2 yrs. old.</p> <p>EOS Destroy when 2 yrs. old.</p>	<p>N/A</p> <p>N/A</p>	<p>Destroy when 1 yr. old</p> <p>N/A</p>	
4370	<p><u>Data Collection and Evaluation</u> Use for material pertaining to data, evaluation reports, & correspondence related to administrative requirements for the collection & evaluation of minority group participation in Extension Service programs.</p> <p>FILE by program.</p>	<p>EOS Destroy when 5 yrs. old.</p>	<p>N/A</p>	<p>Destroy when 3 yrs. old.</p>	
4400	<p><u>SAFETY AND HEALTH</u> Use for material of a general nature which pertains to the implementation, development, coordination & monitoring of agency policy on occupational safety & health of Federal employees.</p> <p>FILE by subject.</p>	<p>CMS/PMSD Destroy when S/O or when no longer needed for reference.</p>	<p>N/A</p>	<p>Destroy after 1 yr. or on discontinuance, whichever is first.</p>	
4400-2	<p><u>Reports</u> Use for material which pertains to safety &</p>	<p>CMS/PMSD Destroy when 3</p>		<p>Destroy when 1 yr.</p>	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4400-3	health. FILE by subject. <u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects. FILE Case file alphabetically by title of project.	yrs. old. CMS/PMSD Destroy 1 yr. after the yr. in which the project is closed.	N/A N/A	old. Destroy when no longer needed.	GRS-16-5
4410	<u>Program Management</u> Use for material pertaining to overall plans for safety & occupational health, compliance with standards & regulations; & the identification & implementation of needed adjustments in purchasing, storage, repair & salvage operations to assure inclusion of countermeasures for accident related losses. FILE by subject in chronological sequence.	CMS/PMSD Destroy when S/O or when no longer needed for reference.	N/A	Destroy when no longer needed.	
4420	<u>Education/Training</u> Use for material pertaining to the determination of the training & education resources needed to compensate for accident related loss potential & the establishment of the various structures & procedures for communicating information. Included are programs for supervisory & collateral duty safety & health personnel. FILE by subject in chronological sequence.	CMS/PMSD Destroy when S/O or when no longer for reference.	N/A	Destroy when no longer needed.	
4430	<u>Employee Services</u> Use for material pertaining to compensation for human factors that are known or suspected to have undesirable influences upon safety & occupational health efforts including the criteria for the Employee Assistance Program &	CMS/PMSD Destroy when S/O or when no longer needed for reference.	N/A	N/A	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4430-1	<p>Medical/Health Services Programs. Also included are safety & occupational health promotional activities & the development & periodic practices of facility self-protection plans.</p> <p>FILE by subject in chronological sequence.</p> <p><u>Employee Health</u> Forms, correspondence, & other records, including summary records, documenting an individual employee's medical history physical condition, & visits to Govt. health facilities, for non-work related purposes, EXCLUDING records covered by item 21; of GRS 1.</p> <p>FILE alphabetically by employee.</p>	<p>CMS/PMSD Destroy 6 yrs. after date of last entry.</p>	N/A	N/A	GRS-1-19
4430-2	<p><u>Accidents</u> Use for material pertaining to injury compensation (relating to on-the-job injuries); excluding copies filed in the OPF & copies submitted to the Labor Dept.</p> <p>FILE alphabetically by employee.</p>	<p>CMS/PMSD Cutoff on termination of compensation or when deadline for filing a claim has passed. Destroy 3 yrs. after cutoff.</p>	N/A	N/A	GRS-1-31
4440	<p><u>Supervision</u> Use for material pertaining to the establishment, assessment, regulation & preservation of environmental conditions that minimize adverse effects upon the safety & health of employees. Included are inspections, surveillance & monitoring, guarding/isolation, protective equipment programs, job safety analysis, task analysis, operational design, & bio-mechanics.</p>	<p>CMS/PMSD Destroy when S/O or when no longer needed for reference.</p>	N/A	Destroy when no longer needed.	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4450	<p>FILE by subject in chronological sequence.</p> <p><u>Evaluation</u> Use for material pertaining to the development & utilization of techniques for measuring, reporting, evaluating; & researching safety & occupational health data. Also procedures for determining the effectiveness of safety & occupational health efforts on a continuing basis utilizing accepted review & revision techniques. Also includes the Incident Reporting System, Health Surveillance System, Annual Program Evaluation System & other data collection activities.</p> <p>FILE by subject in chronological sequence.</p>	CMS/PMSD Destroy when S/O or when no longer needed for reference.	N/A	Destroy when no longer needed.	
4600	<p><u>PERSONNEL SECURITY</u> Use for material of a general nature which pertains to the administration & operation of the personnel security clearance program & not listed below.</p> <p>FILE in chronological sequence.</p>	CMS/PMSD Destroy when 2 yrs. old.	N/A	Destroy when 1 yr. old.	GRS-18-21
4600-2	<p><u>Reports</u> Use for material which pertains to reports on personnel security.</p> <p>FILE by subject.</p>	CMS/PMSD Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
4600-3	<p><u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects.</p> <p>FILE Case file alphabetically by title of project.</p>	Destroy 1 yr. after the yr. in which the project in closed.	N/A	Destroy when no longer needed.	GRS-16-5
4610	<p><u>Security Clearance</u> Use for material pertaining to</p>	CMS/PMSD Destroy upon	N/A	N/A	GRS-18-22a

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
4620	<p>investigations of personnel employed by or seeking employment from the Government & persons performing work for the agency under contract. Excludes copies of investigate reports & related papers furnished to agencies by OPM.</p> <p>FILE alphabetically by employee.</p> <p><u>Identification Cards, Passes, Badges</u> Use for material pertaining to identification cards, credentials, badges, parking permits, photographs, USDA motor vehicles operating permits, visitors & dining room passes, xerox & supply cards, etc.</p> <p>File alphabetically by employee.</p>	<p>notification of death or not later than 5 yrs. after separation or transfer of employee or not later than 5 yrs. after contract relationship expires, whichever is applicable.</p> <p>CMS/PMSD/ MSB Destroy 3 mo. after return to issuing office.</p>	N/A	N/A	GRS-11-4a
4620-1	<p><u>Records of Identification Cards</u> Use for receipts, indices, listings & accountable records.</p> <p>FILE by identification number and/or chronological sequence.</p>	<p>CMS/PMSD Destroy after all listed credentials are accounted for.</p>	N/A	N/A	GRS-11-4b
5000	<p><u>PROCUREMENT MANAGEMENT</u> Use for material of a general nature which pertains to purchase & maintenance of equipment, publications, printing, reproduction, services & supplies for internal needs. Includes contracts, bidders, purchase orders, FEDSTRIPS, & requisitions & other material not described elsewhere in this category.</p> <p>FILE by subject.</p>				

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5000-2	<p><u>Routine Procurement Files</u> Use for contract, requisition, FEDSTRIPS purchase order, lease, & bond & surety records, including correspondence & related papers pertaining to bids, awards, administration, receipt, inspection & payment. (Canceled or deleted transactions are to be destroyed when 1 yr. old).</p> <p>a. Transactions of more than \$25,000 & all construction contracts exceeding \$2,000.</p> <p>b. Transactions of \$25,000 or less and construction contracts under \$2,000.</p> <p>c. Copies of records described above used for administrative purposes.</p> <p>d. Obligating copy.</p> <p>NOTE: Procurement files which document the initiation & development of transactions which deviate from normal procurement transactions must be disposed of on an individual basis by submitting an SF-115.</p> <p>FILE by subject and document number.</p>	<p>CMS/PMSD/ MSB Destroy 6 yrs. 3 mo. after final payment.</p> <p>CMS/PMSD MSB Destroy 3 yrs. after final payment.</p> <p>CMS/PMSD MSB Destroy upon termination or completion.</p> <p>CMS/BAD Destroy when funds are obligated.</p>	<p>When 2 yrs. old</p> <p>N/A</p> <p>When 2 yrs. old.</p> <p>N/A</p>	<p>Destroy when funds are obligated.</p> <p>Destroy when funds are obligated.</p> <p>Destroy upon receipt of goods or service.</p> <p>Destroy when funds are obligated.</p>	<p>GRS-3-3a(1)</p> <p>GRS-3-3a(2)</p> <p>GRS-3-3c</p> <p>GRS-3-3b</p>
5000-3	<p><u>Solicited & Unsolicited Bids & Proposals</u> a. Successful bids & Proposals.</p>	<p>CMS/PMSD/ MSB</p>			

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5000-4	b. Solicited & unsolicited unsuccessful bids & proposals. (1) When filed separately from contract case files.	Destroy with related contract case files (see 5000-2 of this schedule).	N/A	Destroy 1 yr. after award or contract.	GRS-3-5a
	(2) When filed with contract case files.	Destroy when related contract is completed.	N/A	Destroy 1 yr. after award of contract.	GRS-3-5b(2)(a)
	c. Canceled Solicitations (1) Formal solicitations of offers to provide products or services (e.g., Invitations for Bids, Requests for Quotations) which were canceled prior to award of a contract. The files include presolicitation documentation on the requirement, any offers which were opened prior to the cancellation, documentation on any government action up to the time of cancellation, & evidence of the cancellation.	Destroy with related contract case files (see 5000-2 of this schedule).	N/A	N/A	GRS-3-5b(2)(b)
	(2) Unopened bids	Destroy 5 yrs. after date of cancellation.	N/A	Destroy 1 yr. after date of cancellation.	GRS-3-5c(1)
	FILE by subject and document number.	Return to bidder.	N/A	N/A	GRS-3-5c(2)
	<u>Bidders List</u> List of cards of acceptable bidders. NOTE: See 5020 for debarred, suspended, & ineligible bidders lists. FILE alphabetically by bidder.	CMS/PMSD MSB Destroy when S/O.	N/A	Destroy when S/O.	GRS-3-5d

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5000-5	<u>Tax Exemption Files</u> Use for tax exemption certificates & related papers. FILE by FY.	CMS/PMSD MSB Destroy 3 yrs. after period covered by account.	N/A	N/A	GRS-3-12
5000-6	<u>Reports</u> Use for material pertaining to bids, awards, inspections & payments. FILE by bid number in chronological sequence.	Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	
5000-7	<u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects. FILE: Case file alphabetically by title of project.	CMS/PMSD MSB Destroy 1 yr. after the yr. in which the project is closed.	N/A	Destroy when no longer needed.	GRS-16-5
5010	<u>USDA Procurement Reporting System</u> Use for material pertaining to the automated payment system within the Dept. which dictates the use of a standard Dept.-wide procurement identification system for the purposes of reporting & control. FILE by subject.	CMS/PMSD MSB Destroy when S/O.	N/A	N/A	
5020	<u>Debarred, Suspended, & Ineligible Bidders</u> Use for lists of firms & individuals debarred or suspended, or declared ineligible for any cause. FILE by contractor's name.	CMS/PMSD/ MSB Destroy when S/O.	N/A	N/A	
5030	<u>Sureties</u> Use for material pertaining to the necessary requirements stipulated when a bid performance, payment bond, or	CMS/PMSD MSB Destroy when S/O.	N/A	N/A	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5040	<p>individual surety is required.</p> <p>FILE in chronological sequence.</p> <p><u>ADP</u> Use for material pertaining to the actual procurement of all automatic data processing equipment commercially available software, maintenance services, & related supplies.</p> <p>NOTE: See 3220 - for non-procurement material related to acquisition of ADP equipment & services.</p>	CIT Destroy when S/O.	N/A	N/A	
5050	<p>FILE in chronological sequence.</p> <p><u>Labor Standards</u> Use for material pertaining to the procedures for the maintenance of records retained by contractors pursuant to specified contractual clauses included in contracts & subcontracts to satisfy certain statutory & administrative records review requirements of the Government.</p>	CMS/PMSD MSB Destroy when S/O.	N/A	N/A	
5060	<p>FILE in chronological sequence.</p> <p><u>Departmental Blanket Purchase Arrangements</u> Use for documentation of blanket purchase arrangements, e.g., letters, purchase orders, or other documents stating to vendor the person(s) authorized to make individual purchases, how purchases will be placed, i.e., by telephone or designated persons ordering & pick up supplies from the vendor.</p> <p>FILE by vendor's names.</p>	CMS/PMSD/ MSB Destroy when S/O.	N/A	N/A	

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Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5070	<p><u>Consulting Services</u> Use for material pertaining to the lists & costs of persons who are members of a particular profession or possess a special skill & who are not officers or employees of the contractor.</p> <p>FILE in chronological sequence.</p>	CMS/PMSD/ MSB Destroy when S/O.	N/A	N/A	
5080	<p><u>Disputes</u> Use for material to disputes arising relating to the contractor. Included is a copy of contractors claims to the Procurement Contracting Officer & a copy of the Contracting Officer's decision. FILE in chronological sequence.</p>	CMS/PMSD/ MSB Destroy when S/O.	N/A	N/A	
5090	<p><u>Socioeconomic Procurement</u> Use for material pertaining to lists of individual(s) & or firms that are both socially & economically disadvantaged. FILE by program title.</p>	CMS/PMSD/ MSB Destroy when S/O.	N/A	N/A	
5100	<p><u>REAL PROPERTY MANAGEMENT</u> Use for material of a general nature which pertains to the management & use of buildings & land owned or leased by the Government, including its proper & economical use & which does not fit elsewhere in this category. FILE by agency location.</p>	CMS/PMSD/ MSB Destroy when 3 yrs. old.	N/A	Destroy when 3 yrs. old.	
5130-1	<p><u>Excess Real Property Reports</u> Use for excess property reports and supporting documents. FILE by location and property identification.</p>	CMS/PMSD MSB Destroy when S/O.	N/A	N/A	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5160	<p><u>Use of Official Agency Symbols</u> Use for material pertaining to posted official signs of prohibitory, regulatory, or directory nature & such subjects as use of Department seal; the Secretary's & Department's flag; naming of Department facilities; memorials, plaques, or corner stones, and use of the 4-H emblem.</p> <p>FILE by subject.</p>	CMS/PMSD MSB Destroy when S/O.	N/A	Destroy when S/O.	
5200	<p><u>PERSONAL PROPERTY MANAGEMENT Correspondence Files</u> Pertaining to the operation & administration of property management, including the Federal Excess Personal Property Program administered with the State Extension Services under PL 97-98. Use for material of a general nature which pertains to nonexpendable equipment, acquisition, maintenance & disposal. Personal property includes such items as furniture & office equipment.</p> <p>FILE in chronological sequence.</p>	CMS/PMSD/ MSB Destroy when 6 yrs. old.	N/A	N/A	
5200-2	<p><u>Personal Property Accountability List/Index</u> Use for listings which provide a means for accounting for personal property. Includes master property print-outs, station listings, working capital & appropriated funds listings, etc.</p> <p>FILE in chronological sequence.</p>	CMS/PMSD/ MSB Destroy when updated.	N/A	Destroy when updated.	
5200-2-1	<p><u>Property Accountability Forms</u> Filed numerically, & used for updating inventories. These forms include AD-107 Report of Transfer or other Disposition or Construction of Property; AD-109, Excess Serviceable Property; AD-112, Report of</p>	Destroy when 2 yrs. old.	N/A	N/A	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5200-2-2	Unserviceable Lost or Damaged Property. FILE in chronological sequence. <u>Property Pass Files</u> Authorizing removal of property or materials (AD Form 197).	CMS/PMSD/ MSB Destroy 3 mos. after expiration or revocation.	N/A	N/A	
5200-3	FILE in chronological sequence. <u>Excess Personal Property Records</u> Case files relating to the acquisition of excess personal property, including SF-122, Transfer Order, Excess Personal Property, with supporting documents.	CMS/PMSD/ MSB Destroy when 6 yrs. old.	N/A	N/A	
5200-4	FILE in chronological sequence. <u>Reports</u> Use for material pertaining to inter/intra agency reports relating to excess & surplus personal property.	CMS/PMSD/ MSB Destroy when 3 yrs. old.	N/A	Destroy when 1 yr. old.	GRS-4-2
5200-5	FILE by subject, agency, & state. <u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects. FILE: Case file alphabetically by title of project.	CMS/PMSD/ MSB Destroy 1 yr. after the yr. in which the project is closed.	N/A	Destroy when no longer needed.	GRS-16-5
5300	<u>SUPPLY MANAGEMENT</u> Use for material of a general nature pertaining to the requisition of procuring of expandable supplies & equipment.	CMS/PMSD/ MSB Destroy when 2 yrs. old.	N/A	Destroy when no longer needed.	
5300-2	FILE by unit in chronological sequence. <u>Requisitions</u> Use for requisitions of supplies and equipment.	CMS/PMSD/ MSB Destroy 2 yrs.		Destroy when 6	

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)
5300-5	FILE by unit. <u>Stores Accounting</u> Use for stores acctg. returns & report. FILE in chronological sequence.	after completion or cancellation of requisition. CMS/PMSD/ MSB Destroy when 3 yrs. old.	N/A	mos. old.	GRS-3-8(a)(b)
5300-6	<u>Working Papers</u> Use for work papers used in accumulating stores accounting data. FILE in chronological sequence.	Destroy when 2 yrs. old.	N/A	N/A	GRS-8-3
5300-8	<u>Project Control</u> Use for memoranda, reports & other records documenting assignments, progress & completion of projects. FILE Case file alphabetically by title of project.	Destroy 1 yr. after yr. in which project is closed.	N/A	Destroy when no longer needed.	GRS-8-4
					GRS-16-5

EXTENSION SERVICE DISPOSITION SCHEDULE

Classi- fication Number	Description and Filing Instructions	Disposition			
		Record Office		Other Offices	Disposition Authority
		OPI & Disposition	To WNRC		
(1)	(2)	(3)	(4)	(5)	(6)