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REQUEST FOR RECORD: SPOSITION AU	THORITY	LEAVE BLANK				
(See Instructions on reverse)	(See Instructions on reverse)					
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TO GENERAL SERVICES ADMINISTRATION, NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON,	DATE RECEIVED					
1 FROM (AGENCY OR ESTABLISHMENT) Department of H	ousing	2 3 JUL 1979				
and Urban Development	• –					
2 MAJOR SUBDIVISION Assistant Secretary for Federal Housing Commissioner	Assistant decireduly for housing					
³ MINOR SUBDIVISION Deputy Assistant Secreta Public Housing and Indian Programs	ry for	be stamped "disposal not approved" or "withdrawn" in colum	nn 10			
4 NAME OF PERSON WITH WHOM TO CONFER	5. TEL EXT	Turner 1 Or''	. 1			
Carol L. Hutzell	755-5200	4-9-80 Archivist of the United State	<u></u>			
6 CERTIFICATE OF AGENCY REPRESENTATIVE		fr				
I hereby certify that I am authorized to act for this agen that the records proposed for disposal in this Reques this agency or will not be needed after the retention pe	it of <u>28</u> page	aining to the disposal of the agency's record re(s) are not now needed for the business	ls; of			
A Request for immediate disposal.						
B Request for disposal after a spec retention.	ified period o	of time or request for permaner	nt			

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с DATE Прз/79	D SKINATURE OF AGENCY REPRESENTATIVE	E TITLE Departmental Reco Officer	ords Manag	gement
7. ITEM NO	8. DESCRIPTION OF IT (With Inclusive Dates or Retention		9. Sample or Job No	10. Action taken
<u></u>	RECORDS DISPOSITION	SCHEDULE 35		
	LOW INCOME PUBLIC HOUSING AND REN RECORDS			
	This schedule provides disposi- HUD records accumulating under the 1937 (42 U.S.C. 1401 et seq.) as It includes the Section 8 Housing (HAP), Section 23, Conventional, Modernization and Indian Housing p programs provide assistance to low form of direct payments for the co operating and/or modernizing renta low-income families (Public Housin assistance payments to reduce rent private, public or FHA-insured fin private owners (Section 8 Lower-In Assistance).	e U.S. Housing Act of amended and 24 CFR 275. Assistance Payments Turnkey, Acquisition, programs. These w-income families in the ost of building, al housing for ng) and housing ts in housing built with nancing or leased from		
	Records created and maintained Housing program are the same as the maintained under the Public Housing wherever the term "public housing schedule, it includes Indian hous	nose created and ng program. Therefore, agency" appears in this		108 ctow
115-107	Closed 4-2:4-80	NNR All FACL	STANDARD Revised Apri Prescribed b Administra FPMR (41 CF	1, 1975 y General Services tion

Request	or Records Disposition Authority – Continuation	JOB NO	PAGE OF 2 Of 9
7 ITEM NO	8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9 Sample (Job No	
	This schedule covers both Headquarters and field records related to the programs listed above wherever they are maintained except for related records mainta by the Headquarters Office of Finance and Accounting.	ined	
	A. <u>SUMMARY OF HUD/PHA SCHEDULES, NARS JOBS AND RETEN</u> <u>PLANS SUPERSEDED BY THIS SCHEDULE</u> . This is a sum of HUD/PHA records disposition schedules, NARS Jo and Retention Plans superseded by this schedule. Sections B through F below give more detailed information on the supersedure.	mary	
	 This Schedule supersedes HUD Records Disposit Schedules 35 and 39 through 48. 	ion	
	 This schedule supersedes former PHA Records Disposition Schedules 2660 through 2666, 2669 through 2677, 2680 and 2681.)	
	3. This schedule supersedes the following NARS Jobs:		
	344-S111, Approved 5-5-44 346-S191, Approved 1-3-46 348-S67, Approved 12-16-47 348-S132, Approved 2-17-48 348-S163, Approved 3-22-48 348-S168, Approved 4-15-48 348-S174, Approved 4-15-48 351-S368, Approved 10-15-51 352-S83, Approved 10-15-51 352-S345, Approved 4-7-52 II-NNA-557, Approved 6-17-53 II-NNA-922, Approved 4-15-54 II-NNA-923, Approved 4-15-54 II-NNA-924, Approved 4-15-54 II-NNA-983, Approved 5-26-54 II-NNA-992, Approved 3-10-55 II-NNA-1499, Approved 3-6-56 II-NNA-1959, Approved 3-6-56 II-NNA-2456, Approved 6-25-57 II-NNA-2457, Approved 6-25-57 II-NNA-2456, Approved 6-25-57		
	II-NNA-3051, Approved 8-10-59 II-NNA-3121, Approved 1-18-60 II-NNA-3242, Approved 6-2-60 II-NN-3393, Approved 3-2-61		
115-203	Four copies, including original, to be submitted to the National Arc	chives STAND	ARD FORM 115-A

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115-203

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request to	or Records Dis	position Autho	ority Continu	Jation	JOB NO		PAGE OF 3 Of 9
7 ITEM NO		9 SAMPLE OR JOB NO	10. Action taken				
	I I NN	-NN-3513, Ap -NN-3612, Ap -162-24, App -170-17, App	proved 2-2 proved 3-26	1-62 -62			
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	existi includ item o the co schedu	ng HUD recor ing records f this new s rresponding	rds disposi never befo schedule, t existing H ns being su	schedule consol tion schedules re scheduled. he following ta UD records disp perseded with t	as well as For each ble gives osition		
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		43	33	II-NN-3612	18		
		44	3	II-NN-3393	3		
		44	8	II-NN-3393	8		
		46	9	II-NN-3513	9		
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1	or Records Disp	osition Auth	ority — Contin	uation	JOB NO	9	PAGE OF 4 of 9			
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	19	35	24	II-NNA-3051	24					
		46	7	II-NN-3513	7					
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	21	35	37	II-NNA-3051	37					
	22	35	38	II-NNA-3051	38					
	23	43	23	II-NN-3612	12					
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7 EM NO		9 SAMPLE OR JOB NO	10 ACTION TAKE				
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		44	7	II-NN-3393	7				
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		43	29	II-NN-3612	20				
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		44	5	II-NN-3393	5				
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		45	6	11-NNA-3121	5				
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	None		2665	1-24		A-2496	1-24		
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	Disposition Authority – Continuation	JOB NO	PAGE OF 8 Of 9
7. ГЕМ NO	8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9 SAMPLE C JOB NO	
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Four copies, including original, to be submitted to the National Archives

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7. TEM NO	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)						9. SAMPLE OR JOB NO	10 Action takei
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LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

This schedule provides disposition instructions for HUD records accumulating under the U.S. Housing Act of 1937 (42 U.S.C. 1401 et seq.) as amended and 24 CFR 275. It includes the Section 8 Housing Assistance Payments (HAP), Section 23, Conventional, Turnkey, Acquisition, Modernization and Indian Housing programs. These programs provide assistance to low-income families in the form of direct payments for the cost of building, operating and/or modernizing rental housing for low-income families (Public Housing) and housing assistance payments to reduce rents in housing built with private, public or FHA-insured financing or leased from private owners (Section 8 Lower-Income Housing Assistance).

Records created and maintained under the Indian Housing program are the same as those created and maintained under the Public Housing program. Therefore, wherever the term "public housing agency" appears in this schedule, it includes Indian housing agencies.

This schedule covers both Headquarters and Field records related to the programs listed above wherever they are maintained except for related records maintained by the Headquarters Office of Finance and Accounting.

NOTE: The Section 8 and Section 23 program files are covered by items 67 through 73 of this Schedule. All other program files are covered by items 1 through 66. Item 74 covers the ADP systems pertaining to all the programs.

No.	Description of Records	Disposition
	Public Housing Program Reservation an	d Management
1.	Organization Transcript file. Contains the documents evidencing the creation of the public housing agency.	Destroy 6 years after termination and expiration of all contracts and
	(5 x r ore typion bres let or t)	obligations of HUD with the public housing agency.
2.	Nonrecord copies of Cooperation Agreement between the public housing agency and the local governing body	Destroy 6 years after termination and expiration of all

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LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item	
No.	

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Description of Records

Disposition

housing agency.

contracts and obligations

of HUD with the public

(or taxing body) regarding tax exemption, payments in lieu of taxes, equivalent elimination of substandard dwellings (when required by statute), providing services to projects, and other forms of cooperation.

(Note: The record copies are kept by the Office of Finance and Accounting. See HUD Schedule 12.)

- 3. Cooperation Agreement File. Contains Destroy 5 years after termination of Annual documents on housing projects conveyed from War Housing use to low-income Contributions Contract or use, including indenture of lease, Administration Contract. cooperation agreement between public housing agency (PHA) and the local governing body (taxing body), copy of transcript of PHA's proceedings containing resolution authorizing the indenture of lease, computation of effective tax rate, and related correspondence.
 - 4. Notification of Housing Assistance Destroy 2 years after Availability (NOHAA) or HUD issuance. advertisements and invitations.
 - Public housing agency applications for Program Reservation of Low-Income Housing and for Preliminary Loan, supporting documents, Program Reservation, and related correspondence.

a.	Approved applications.	Destroy 5 years after the Annual Contributions Contract is executed.
b.	Disapproved or withdrawn applications.	Place in inactive file upon disapproval or

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	Disposition
10.		withdrawal. Retire to a Federal Records Center l year after disapproval or withdrawal or when volume warrants. Destroy 3 years after disapproval or withdrawal.
6.	Application File containing the application for conveyance of a permanent War Housing Project for low-income use, general certificate, extract of minutes of meeting of members of public housing agency and related correspondence.	Destroy 5 years after termination of Annual Contributions Contract or Administration Contract.
Т	Special housing surveys and census tabulations and related documents and correspondence.	Destroy when no longer WithdRawn needed for reference.
8.	Management Policy File containing correspondence; public housing agency (PHA) management policies including occupancy, personnel and procurement policies; and copies of PHA resolutions establishing such policies.	Destroy 1 year after HUD management and occupancy audit of housing agency.
9.	Project insurance policies, fidelity bonds, and related correspondence.	
-	a. Insurance policies and the related correspondence.	Place in inactive file when policy expires and retire to a Federal Records Center 1 year thereafter. Destroy 6 years after policy expires.

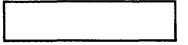
Page 3

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LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	<u>Disposition</u>
	b. Fidelity bonds and related correspondence.	Place in inactive file at end of bond premium period following termination and retire to a Federal Records Center 3 years thereafter. Destroy 6 years after termination of Bond.
10.	Subject File, consisting of correspondence and documents relating to the management of low-income housing projects.	
	 Special cases involving unusual problems, special test programs or other novel arrangements. 	Destroy when 5 years old or when no longer needed for reference or administrative purposes, whichever is later. Review annually.
	b. All other files.	Destroy when 3 years old.
11.	Management Review and Trip Reports. Files containing correspondence and documents relating to management audits and reports; annual status reports of management operations, trip reports, consolidated reviews of management operations, management check lists, and management reviews.	Destroy l year after HUD audit of public housing agency.
12.	Administration Contract File containing the Administration Contracts and amendments, copy of quitclaim deed,	Destroy 5 years after termination of Annual Contributions Contract or Administration Contract.



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.

No. Description of Records

Disposition

inventory report, extract of minutes of meeting of public housing agency authorizing the execution of deeds and other documents, copy of general certificate and general depositary agreement.

Public Housing Finance and Budget

13.	Preliminary Loan Contract and documents required for advances of funds under the contract.	Retire to a Federal Records Center when contract is terminated and funds advanced under the contract have been repaid. Destroy 6 years after contract termination and repayment of funds.
14.	Nonrecord copies of Annual Contributions Contract including amendments, public housing agency authorizing resolutions, and other related documents and correspondence.	Destroy 6 years after termination or expiration of the contract.
	(Note: The record copies are kept by the Office of Finance and Accounting. See HUD Schedule 12.)	
15.	Nonrecord copies of Lists of Preliminary Loan Contracts and Annual Contributions Contracts to be entered into by HUD and public housing agencies for Low-Rent Housing Projects. Includes project docket file copies kept by Field Offices.	Destroy when no longer needed for administrative purposes. Review annually.

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item

Disposition No. Description of Records (Note: The record copies are kept by the Office of Finance and Accounting. See HUD Schedule 12.)

- 16. Administrative file containing copies of reports, surveys, and special studies relating to public housing agency budget preparation, budget review, reserve fund data, administrative loan data. management feasibility. accounting, and investments.
- 17. Operating budget documents and records relating to HUD review and approval, including workpapers and rough data, copies of consolidated budget when Center 3 years after files of analyses, budget approval sheets, budget revision approval, waivers, and related correspondence.
- 18. Financial reports consisting of statements of operating receipts and expenditures, supporting data and related correspondence.

Break file at end of fiscal year and place in inactive file. Retire Wactive file to Federal Records Center While 3 years after files break O Destroy 10 years after

fiscal year of the budget when 10 years ald.

Break file at end of fiscal year and place in inactive file. Retire Wactime file to a Federal Records Center broak. Destroy Gayears

after the fiscal rear of the budget when 6years old

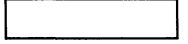
Break file at end of fiscal year and place in inactive file. Retire INactive file to a Federal Records Cepter Whenter 3 years after old.

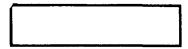
Files break Destroy when 6 years after the old, fiscal-year the

budget.

changes for tenco 16-19 per M.G. & C.H. 1-31-30

Page 6





LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item

No.	Descri	ption	of	Records

- 19. Records relating to payments made in lieu of taxes, Public Voucher for Payments Made to Taxing District in Lieu of Taxes, tax reports, correspondence, and other documents supporting payments.
- 20. Case files consisting of the Advance Note, Requisition for Funds, General Certificate, Certificate of Purpose, Note Signature Certificate, and other related documents and correspondence.
- 21. Case files or records relating to temporary financing of housing projects, consisting of Note Transcript, Requisition for Funds, Note Signature Certificate, Requisition Agreement, Public Housing Agency Resolution, minutes of meetings, Certificate as to Transmission of Temporary Notes and supporting documents, and other related documents required for temporary financing.
 - a. Case files relating to temporary financing prior to permanent financing.

Disposition

Change per MG +C.H. 1-31-80

Break file at end of fiscal year and place in inactive file. Retire INactive file to a Federal Records Center When Center 3 years after files old break. Destroy 6-years after the fiscal-years after the fiscal-years

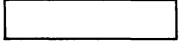
Destroy 3 years after date of payment of respective note.

change per CG+ C.H. 1-31-80

Destroy Lyear after date of permanent financing-or-

6=years af annual Contributions Control is executed copproved)

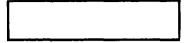
Page 7



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	 Description of Records b. Case files relating to temporary financing after permanent financing. 	Disposition H Destroy years after date of payment of permanent respective issue of financing temporary motes.
22.	Case files of records relating to permanent financing of housing projects, consisting of Permanent Note, Requisition for Funds, Note Transcript, Note Signature Certificate, Amendments, Bond Transcript, minutes of meetings of public housing agency and other related documents required for permanent financing.	Destroy 6 years after all obligations, contracts, and liabilities have been paid and satisfied in full.
23.	File of individual mortgages of rural low-income housing projects held by HUD containing a copy of the mortgage, copy of the mortgage note, and related correspondence.	Place in inactive file upon issuance of mortgage release and retire to the Federal Records Center 2 years thereafter. Destroy 6 years after date of release of HUD mortgage interest.
24.	Reports on fiscal audits of public housing agencies which contain the auditor's comments, balance sheets, and Notices of Exceptions and Findings which reflect noncompliance with HUD policies and contractual provisions.	
	a. Reports on Audit involving development costs.	Destroy after Actual Development Cost Certificate _v issued. <i>İs</i>



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Desc	scription of Records		Disposition	
	b.	A1 1	other Reports on Audit.		
		(1)	Reports on Audit containing Notices of Exceptions and Findings, or items requiring followup.	Destroy 3 years after corrective action on all Exceptions and Findings requiring followup has been completed.	
		(2)	Reports on Audit containing no Notices of Exceptions and Findings or items	Destroy 3 years after date of memorandum transmitting report to the Regional Office.	

Public Housing Development, Design and Construction

requiring any followup.

25.	Development Program, supporting
	documents, and related
	correspondence frzekch
	public holising project.
	pier - with any proper.

Retire to a Federal Records Center when an Actual Development Cost Certificate is issued. Destroy 5 years after issuance of the Actual Development Cost Certificate.

- 26. Development cost forms and related papers relative to the development cost of projects.
 - Actual Development Cost Retire to Certificate and supporting Records C documents (Development Cost issuance Control Statement and Developme breakdown of Construction Certifica and Equipment Costs), after all Determination of Minimum interest Development Cost (latest), and all Development Cost Budgets.

Retire to a Federal Records Center after issuance of the Actual Development Cost Certificate. Destroy after all HUD financial interest is liquidated.

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

t

Item			
No.	Des	scription of Records	Disposition
	b.	All other documents.	Destroy 3 years after issuance of the Actual Development Cost Certificate.
27.	ı	Low-Rent Housing Project Planning Correspondence File, containing copies of correspondence and documents relating to planning aspects of the selection of sites, project and city planning, and technical assistance and advice.	Destroy 6 years after final settlement of the Construction Contract.
28.	·	Subject and project files containing correspondence, documents, and drawings relating to technical and engineering aspects of site planning for housing projects. Includes plans reviewed for the selection of sites, reports of surveys and studies, research and background material, and tentative and final site approvals.	Destroy 5 years after construction is completed.
29.		Site acquisition records, including copies of contracts for survey, for title information or legal reservices, for appraisals, and for securing options; appraisals and appraisal	Retire to a Federal Records Center when land acquisition has been completed. Destroy 6 SEC years after project closeout (after the Actual Development Cost
		<pre>reports; surveys; site maps;</pre>	Certificate is issued.



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

	TROUMAT RECORDS	
Item No.	Description of Records	Disposition
	perimeter descriptions; and other related documents and correspondence including Form HUD-5922, Final Report on Completed Land Acquisition, and Form HUD-5325, Land Summary.	
30.	Preliminary documents, including preliminary specifications, drawings, utility analysis, and other related documents and correspondence.	Retire to a Federal Records Center when See approved and validly <i>rewaw</i> executed contract documents become part of official action. Destroy after final settlement of the construction contract.
31.	Architect's and Engineer's Contract File. Includes contract forms, fee schedules, correspondence and other papers relating to administration and payment. Also includes project diagrams and photographs made before demolition or construction and during construction.	Retire to a Federal Records Center after final settlement of the Construction Contract. Destroy 6 years after final settlement of the Construction Contract.
32.	Project docket file. Consists of demolition, construction, equipment and landscape contract forms, specifications, Turnkey Contracts of Sale, plans, addenda, change orders, construction inspection	Retire to a Federal Records Center after final <u>SPE</u> settlement of the contract. Destroy 6 years after Actual Development Cost Certificate 15 issued.

equest for	Records Disposition Authority-Continuation	JOB NO	PAGE OF
TEM NO	8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9 SAMPLE OF JOB NO	10 ACTION TAKE
29.	Close file and retire to FRC when Actual Development Cost Certificate is issued. Destroy 6 years after the Actual Develop- ment Cost Certificate is issued.	-	
30.	Close case and move to inactive file when validly executed contract documents are approved. Destroy inactive case file aft final settlement of the construction contract.		
32.	Close file and retire to FRC after the Actual Development Cost Certificate is issued. Destroy 6 years after the Actual Development Cost Certificate is issued.	L	
	ch aa ges in disposition instructions for items 29, 30 , and 32 per M. G. and C. H. 1-31-80.	•	
5-203	Four copies, including original, to be submitted to the National Arc	Revised Ju	
	GPO 1975 O - 579-387	Adminis	t by General Servi tration CFR) 101-11 4



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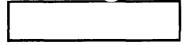
TYPING GUIDE SHEET

·	RECORDS DISPOSITION SC	TEVULE 33
,	LOW INCOME PUBLIC HOUSING AND I	RENTAL ASSISTANCE
	PROGRAM RECORD	S
Item No.	Description of Records	Disposition
	reports, guarantee bonds or similar warranties, and Certificates of Completion Also includes project diagrams and photographs made after the project is completed.	
33.	Correspondence, field reports and other document concerning the administration and payment of demolition, constructio equipment, and landscape contracts.	settlement of the contract. Destroy 6 year
34.	Project and subject files containing correspondence and documents, plans, and tracings relating to research, survey, and studies of the design and construction of public housing for the developmen of standards.	, , t
	a. Files required for research and reference purposes.	Destroy 5 years after construction is complete or when research and reference value ceases, whichever is later. Review annually.
	b. All other files.	on the Bestroy 5-years after - construction is completed.
		1

Page 12

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	RECORDS DISPOSITION SCHEDU	LE 35
,	LOW INCOME PUBLIC HOUSING AND RENT	AL ASSISTANCE
	PROGRAM RECORDS	1
tem No.	Description of Records	Disposition
35.	Project and subject files containing correspondence and documents and structural plans relating to the structural design of public housing projects. Includes material relating to site preparation and foundations of housing projects; basic research material on steel, clay, wood, and other materials; material relating to site and structural plans of housing projects; and reports of tests conducted on housing projects.	Destroy 5 years after construction is completed.
6.	Subject files containing correspondence and documents relating to specifications used in projects. Includes original drawings and sketches used in bulletins, background material and notes, and reports.	Destroy when 5 years old.
37.	Master copies of "Guide Specifications" and master copies of technical bulletins.	Destroy 5 years after superseded. Review With annually.
38.	Technical publications, catalogs and requests.	
	a. Requests for technical publications and catalogs.	Destroy 3 months after transmittal of the publications requested.
	b. Technical publications and catalogs.	Destroy when superseded or obsolete.



i	RECORDS DISPOSITION SCHE	DULE 35
	LOW INCOME PUBLIC HOUSING AND RE	NTAL ASSISTANCE
	PROGRAM RECORDS	
Item No.	Description of Records	Disposition
39.	Subject files containing reports, designs, and calculations relating to site improvement design and construction for low-rent housing projects. Includes experimental data and research material on surfacing types and community facilities and background and research material on the design of water, gas, sewerage and drainage systems.	Destroy 5 years after construction is completed.
	Public Housi	ng Occupancy
40.	Occupancy report form files. Includes reports on initial occupancy, continued occupancy, reexamination, annual certification regarding eligible families admitted, and character- istics of families who have applied but not been admitted. Also includes related correspondence and other documents.	Destroy after HUD occupancy audit of publi housing agency.
41.	Project Property Reports Files consisting of correspondence and documents relating to project characteristics such as unit availability, change in number of units, end of initial operating period, and date of full availability.	Administration Contract

Page 14

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LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	Disposition
42.	Schedule of Rents File containing rent schedules, rent approval sheets, demonstrations of financial feasibility, five-year estimates of average annual rents, five-year estimates of average annual expense, utility allowances, and related correspondence.	Destroy after HUD occupancy audit of public housing agency.
43.	Approved Schedules of Maximum Income Limits File containing amendments of eligibility policy on income limits proposal, revision of income limits, economist's review of proposal for schedule of maximum income limits, revision of maximum income limits, proposal for special admission limits for displaced families, and related correspondence.	Destroy after HUD occupancy audit of public housing agency.
44.	Subject file consisting of correspondence and documents relating to tenant activities on housing projects such as use and operation of community facilities, Boy Scout and Girl Scout activities, child care, playground, tenant organizations, and other recreational activities.	Destroy after HUD occupancy audit of public housing agency.
45.	Compliance Review File consisting of correspondence relating to possible	Destroy after HUD occupancy audit of public housing agency.



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

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PROGRAM RECORDS

	PRUGRAM RECORDS	•
Item No.	Description of Records	Disposition
	violation of HUD policy on occupancy of housing projects, as shown in reports received from public housing agencies.	
46.	Occupancy Audit Reports Files containing the report on audit and related correspondence and documents on such occupancy matters as tenant eligibility for low-income housing; verification of income for admission and continued occupancy; order of preferences for admission; rents; methods and techniques for tenant selection; reexamination changes in scheduling of annual reexamination; and public housing agency letter of certification of eligibility of families.	Destroy l year after findings resulting from HUD occupancy audit of public housing agency are closed.
47.	General working file containing copies of occupancy correspondence, notes, and documents for Occupancy Auditors.	Destroy l year after findings resulting from HUD occupancy audit of public housing agency are closed.
	Public Housing Maintenance and Other Proje	ct Services
48.	Maintenance Engineering Survey File containing the engineer's findings on the operation and maintenance of the physical plant, record	Destroy when superseded by two surveys.

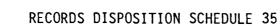
Page 16

HUD-Wash., D. C.

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

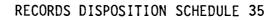
Item No.	Description of Records	Disposition
	of observations, and photo- graphs of the condition of the physical plants and grounds.	,
49.	Reports on the physical characteristics of the public housing projects, such as those prepared on Form HUD-51885, Project Physical Characteristics and Form HUD-51885A, Report on Cathodic Protection System.	Retention period can not the be specified at this time the because a study is being made of the feasibility of automating the data. Review in one year.
50.	Correspondence, research papers, technical publications, and technical reports on operating maintenance and construction problems.	Destroy when no longer needed for reference. Review annually.
51.	Correspondence, catalogs, pamphlets, technical publications, and reports regarding investigations of equipment, materials, costs, and methods for the improvement of project operation and maintenance.	Destroy when no longer needed for reference. Review annually.
52.	Project and subject files containing correspondence and documents relating to utility services and equipment. Includes utility contracts; utility consumption and costs; specifications, bids, and acceptance of utility services; review of utility	



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	Disposition
	services for possible economies; analysis of utility services to effect operating improvements; valuations of HUD-owned utility systems; and assistance in the sale of utility systems.	
	a. Long-term summary reports of utility experience.	Destroy when administration and management value has expired. Review annually.
	b. Other files.	Destroy when 5 years old.
53.	Subject files containing correspondence and documents relating to electrical equipment for housing projects. Includes research and background material on conduits, boxes, interior wiring, and electric meters and reports on tests of electrical equipment.	Destroy 3 years after HUD management review and maintenance survey of public housing agency.
54.	Subject and project files containing correspondence, documents, and drawings relating to plumbing and heating for housing projects. Includes reports of tests and evaluations of heating and water systems and research and background material on heating and water systems.	Destroy 3 years after HUD management review and maintenance survey of public housing agency.



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	Disposition
55.	Subject File consisting of correspondence and documents relating to general studies. Includes studies on garbage and trash disposal, kitchen and laundry operations, central laundry, furniture repair, and central storage; reports and background material; and community building plans.	Destroy 3 years after HUD management review and maintenance survey of public housing agency.
56.	Management contracts for project services and related correspondence.	Retire to a Federal Records Center 1 year after contract termination and final settlement. Destroy 6 years after contract termination and final settlement.
57.	Consolidated Supply Contracts (equipment and maintenance items). Includes bid format, abstract of bids, unsuccessful bids, mailing lists, and related correspondence.	Place in inactive file when contract expires and retire to a Federal Records Center 1 year thereafter. Destroy 6 years after the contract expires.
58.	Correspondence, descriptive literature, specifications, and other material pertaining to the various items covered by consolidated supply contract.	Destroy when superseded. Review annually.

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	Disposition
59.	Copies of public housing agency purchase orders, statements of purchases, invoices, shipping tickets, property surveys, property survey action, bid tabulations, related correspondence, and other material relating to personal property operations.	Place in the inactive file when 1 year old and retire to a Federal Records Center. Destroy when 6 years old.
	Public Housing Mod	dernization
60.	Public housing agency applications (preliminary and final) for Modernization, supporting documents, and related correspondence.	
	a. Approved applications.	Destroy 3 years after Annual Contributions Contract termination.
	b. Disapproved or withdrawn applications.	Place in inactive file upon disapproval or withdrawal. Retire to a Federal Records Center l year after disapproval or withdrawal or when volume warrants. Destroy 3 years after disapproval or withdrawal.
61.	Nonrecord copies of HUD Modernization Lists. (Note: Record copies are kept by the Office of Finance and Accounting. See HUD Schedule 12.)	Destroy 3 years after Annual Contributions - Contract termination.

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

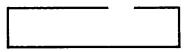
PROGRAM RECORDS

Item No.	Description of Records	Disposition
62.	Documents relating to Modernization construction and equipment contracts, Architect and Engineer agreements, and related correspondence and reports.	Destroy 3 years after Actual Modernization Cost Certificate is issued.
63.	Modernization progress reports and budget and work program revisions.	Destroy 3 years after Actual Modernization Cost Certificate is issued.
64.	Documents required for advances of funds.	Destroy 5 years after Annual Contributions Contract termination.
65.	Nonrecord copies of Actual Modernization Cost Certificate and supporting documents (latest approved Modernization Budget). (Note: Record copies are kept by the Office of Finance and Accounting. See HUD Schedule 12.)	Destroy 5 years after Annual Contributions Contract termination.
66.	All other Modernization documents.	Destroy 3 years after Actual Modernization Cost Certificate is issued.
	Section 8 Rental Assi	stance Program
	Records included in items 67 throu following Section 8 Housing Assist	

following Section 8 Housing Assistance Payments (HAP) and Section 23 Programs: New Construction, Substantial Rehabilitation, Existing, Farmers Home Administration Section 515 FmHA Set-Aside Program, and Housing Finance and Development Agencies (HFDA) Program.

67.	Notification of Fund	Destroy 2 years after NOFA
*	Availability (NOFA) material,	issued.
	allocation plans, and	
	schedules.	





LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	Disposition
68.	Project File. Includes organization transcripts; proposals for new construction and rehabilitation, review material and related correspondence; management policies; Housing Assistance Payments (HAP) agreements and contracts; Lists of Preliminary Loan Contracts and Annual Contributions Contracts (ACC) for Section 8 projects; reviews of estimates of ACC required, preliminary expenses and other financial documents; site material including Environmental Clearance forms, maps and A-95 clearinghouse comments; Architect's Certifications for new construction and rehabilitation projects; and project-related correspondence.	
	a. When project is approved.	Destroy 6 years after HAP contract expires.
	b. When project is approved and later cancelled.	Destroy 3 years after cancellation.
	c. When project is not approved.	Destroy 3 years after disapproval.
69.	Correspondence not related to a specific project. Includes routine requests for information, complaints and other routine program matters not otherwise provided for in this schedule.	Break file at end of fiscal year. Destroy at end of following fiscal year.



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Description of Records	Disposition
70.	General Management File. Includes project and subject files of correspondence and documents relating to management reviews, management agreements, audit and reports, status reports of management operations, trip reports, and management checklists.	Place in inactive when 3 years old. when 6 years old.

71. Occupancy File. Includes occupancy audit reports; tenant applications; recertifications; documents relating to eligibility, admissions, initial occupancy, and tenant characteristics; and correspondence and other documents related to occupancy.

72. Maintenance Engineering, Utilities and Other Project Services File. This file includes documents and records related to the maintenance engineering functions, utility allowances, inspection forms by public housing agencies and owners and related correspondence, and management contracts for project services and related correspondence. Destroy 1 year after findings resulting from HUD occupancy audit are closed.

file Destroy

Place in inactive file when 3 years old. Destroy when 6 years old.

HUD-Wash., D. C.

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item

No. Description of Records

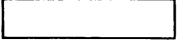
73. Financial File. This file contains documents such as requests for Housing Assistance Payments (HAP) by owners and public housing agencies; rent adjustment correspondence; management reviews and trip report files containing correspondence and documents relating to management audit of owners and public housing agency records; financial forms submitted in support; General Accounting Office exceptions file, consisting of correspondence and documents regarding recommendations as to the disposition of GAO exceptions; files containing forms and documents and related policies.

Place in inactive file at end of 3rd fiscal year after execution of contract. Destroy 6 years after contract termination.

Disposition

Related Automatic Data Processing (ADP) Records

74. Low income public housing/rental assistance ADP records. This item covers ADP records relating to the programs covered by this Schedule. Specifically, this item covers records of the following ADP systems: Bond Maturity Schedule System, Low Rent Housing (LRH) Occupancy System, Lower Income Assistance Program System (LIAPS), Modernization Program Reporting System (MPRS), Public Housing Agency (PHA) Address Directory System, Public Housing Agency (PHA) Operating Statement



LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.

Description of Records

Disposition

System, Section 8 Management Information System, Subsidized Housing--Admissions/Continued Occupancy (SHACO) System, Target Project Program System (TPPS), and Tenant Application Profiles System (TAPS).

a. Documentation files. Cover those records required for servicing machine-readable records for converting them from human readable information to encoded data and vice versa. These are an organized series of descriptive documents required to initiate, develop, operate and maintain specific applications of ADP systems. Destroy 1 year after system is placed on inactive hist.

Sel revision

- b. Input documents.
 - Forms, reports and other documents intended solely to serve as inputs to the system.
 - (2) Forms, reports and other documents which serve other program uses in addition to serving as inputs to the system.
- c. Processing files. Those machine-readable files (from work files and raw data input files to publication

Destroy after data has been entered into the system and verified.

Use the appropriate item in the previous sections of this Schedule.

or Records Disposition Authority – Continuation	JOB NO		PAGE OF
8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9 SAMPLE OR JOB NO	10 Action taken	
required for servicing machine-readable records - for converting them from human readable information to encoded data and vice versa. These are an organized seri of descriptive documents required to ini	es tiate,		
(1) Lower Income Assistance Program Syst (LIAPS) documentation file	em		
(A) Copy of current system documentat file.	ion		
of current file to NARS along wit related master file. Offer futur	h e		
(B) System documentation file maintai by HUD.	ned		
Destroy l year after system is pl on inactive list.	aced		
(A) Copy of current system documentat file.	ion		
of current file to NARS along wit related master file. Offer futur	h e		
(B) System documentation file maintai by HUD.	ned		
Destroy 1 year after system is pl on inactive list.	aced.		
	9		
	 With Inclusive Dates of Retention Periods) a. Documentation Files. Covers those record required for servicing machine-readable information to encoded data and vice versa. These are an organized seri of descriptive documents required to ini develop, operate and maintain scientific application of ADP systems. (1) Lower Income Assistance Program Syst (LIAPS) documentation file. (A) Copy of current system documentat file. (A) Copy of current system documentat file. (B) System documentation file maintai by HUD. Destroy 1 year after system is plon inactive list. (2) Subsidized Housing - Admissions/Cont Occupancy System (SHACO) documentat file. (A) Copy of current system documentat file. (B) System document system documentation file. (C) Subsidized Housing - Admissions/Cont Occupancy System (SHACO) documentation file. (B) System document system documentation file. (C) Subsidized Housing - Admissions/Cont Occupancy System (SHACO) documentation file. (C) Subsidized Housing - Admissions/Cont Occupancy System (SHACO) documentation file. (C) Subsidized Housing - Admissions/Cont Occupancy System (SHACO) documentation file. (D) System documentation file maintain by HUD. (D) System documentation file maintain by HUD. (B) System documentation file maintain by HUD. (C) Substop 1 year after system is play the file. 	 a DESCRIPTION OF ITEM (With Inclusive Dates or Retention Penods) a. Documentation Files. Covers those records required for servicing machine-readable records - for converting them from human readable information to encoded data and vice versa. These are an organized series of descriptive documents required to initiate, develop, operate and maintain scientific application of ADP systems. (1) Lower Income Assistance Program System (LIAPS) documentation file (A) Copy of current system documentation file. Permanent. Transfer immediately copy of current file to NARS along with related master file. Offer future updates to NARS on an annual basis. (B) System documentation file maintained by HUD. Destroy 1 year after system is placed on inactive list. (2) Subsidized Housing - Admissions/Continued Occupancy System (SHACO) documentation file. (A) Copy of current system documentation file. (B) System document system documentation file. (B) System (SHACO) documentation file. (B) System document system documentation file. (B) System document system documentation file. (C) Subsidized Housing - Admissions/Continued destroy of current system documentation file. (B) System document system documentation file. (C) System documentation file maintained by HUD. Destroy I year after system is placed 	B OF RECORD DISPOSITION ALMONTY - Continuation With Inclusive Dates or Retembon Pendsts) SAMPLE ON JOB NO a. Documentation Files. Covers those records required for servicing machine-readable records - for converting them from human readable information to encoded data and vice versa. These are an organized series of descriptive documents required to initiate, develop, operate and maintain scientific application of ADP systems. (1) Lower Income Assistance Program System (LIAPS) documentation file. (A) Copy of current system documentation file. Permanent. Transfer immediately copy of current file to NARS along with related master file. Offer future updates to NARS on an annual basis. (B) System documentation file maintained by HUD. Destroy 1 year after system is placed on inactive list. (2) Subsidized Housing - Admissions/Continued Occupancy System (SHACO) documentation file. (A) Copy of current system documentation file. (B) System document system documentation file. (B) Copy of current system documentation file. (C) Subsidized Housing - Admissions/Continued Occupancy System (SHACO) documentation file. (B) System documentation file. Offer future updates to NARS on an annual basis. (B) System documentation file maintained by HUD. Destroy 1 year after system is placed

equest f	or Records Disposition Authority-Continuation	JOB NO		PAGE OF
7 TEM NO	8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)		9 SAMPLE OR JOB NO	10 ACTION TAKE
74•	a. (3) Other nonpermanent systems' docume files.	ntation	L	
	Destroy l year after system is p on inactive list.	laced		
-203	Four copies, including original, to be submitted to the National	Archives	Revised Jul	FORM 115-A y 1974 by General Serv

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LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.	Des	cript	ion o	f Records	Disposition
		files) wh		security backup ich are used to d use a master	
			Bond Syste	Maturity Schedule em.	Scratch 30 days after tape is created.
		(2)	A11 (other ADP systems.	Scratch after third update cycle.
	d.	the data	defin	le. Constitutes itive state of a in a system at a e.	
		(1)		e the system is ational.	
			(a)	Bond Maturity Schedule System.	Scratch 30 days after tape is created.
			(b)	Low Rent Housing (LRH) Occupancy System.	Scratch after fifth update cycle.
			(c)	Lower Income Assistance Program System (LIA PS)	Scratch after sixth update cycle. 5 [°] Cl XlWWiM
			(d)	Public Housing Agency (PHA) Address Directory System.	Scratch after next update.
			(e)	Section 8 Management Information System. This system has an	Scratch after third update cycle.

Request f	or Records Disposition Authority–Continuation	JOB NO		PAGE OF
7 ITEM NO	8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)		9 SAMPLE OR JOB NO	10 ACTION TAKEI
74•	d. (1) (c) Lower Income Assistance Program Sys (LIAPS).	stem		
	<u>l</u> Copy of current master file.			
	Permanent. Transfer copy of th current master file to NARS immediately and offer future up to NARS on an annual basis.			
	2 Copy of master file retained in HUD tape library.	n		
	Scratch after sixth update cyc	le.		
-203	Four copies, including original, to be submitted to the National Arc	chives	STANDARD	FORM 115-A

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LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

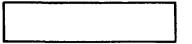
Item No.	Description o	f Records	Disposition
		extract file which consists of partial data extracted to produce monthly Cumulative and Summary Reports. This file is not an exact copy of the data available in the system. The disposition given is for this extract file.	
	(f)	Subsidized HousingAdmissions /Continued Occupancy (SHACO) System.	Scratch after tenth update cycle. See Revision
	(g)	Tenant Application Profile System (TAPS).	Scratch after third update cycle.
	(h)	All other ADP Systems.	
		<u>1</u> Master file produced by the fourth (final) quarterly update each year.	Scratch 5 years after creation. See revision
		<u>2</u> Master file produced by the other quarterly updates each year.	Scratch after fourth (final) quarterly update each year.

lequest for	Records Disposition Authority-Continuation	JOB NO		PAGE OF
7 ITEM NO	8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)		9 SAMPLE OR JOB NO	10 Action taken
74. d.	• ,_ 、			
	<pre>(1) (f) Subsidized Housing-Admissions/Cont ued Occupancy (SHACO) System.</pre>	tin-		
	<u>l</u> Copy of current master file.			
	Permanent. Transfer copy of th current master file to NARS immediately and offer future up to NARS on an annual basis.	}		
	2 Copy of master file retained in HUD tape library.	n		
	Scratch after tenth update cyc	le.		
5-203	Four copies, including original, to be submitted to the National Arc	hives	STANDARD	FORM 115-A

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Request f	Request for Records Disposition Authority – Continuation			PAGE OF
7 ITEM NO	8 DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)		9 SAMPLE OR JOB NO	10 ACTION TAKEN
		e- PPS). rth r.	SAMPLE OR	10 ACTION TAKEN
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RECORDS DISPOSITION SCHEDULE 35

LOW INCOME PUBLIC HOUSING AND RENTAL ASSISTANCE

PROGRAM RECORDS

Item No.

Description of Records

Disposition

(2) When the system is deleted from the inventory of active systems. Destroy 1 year after system is placed on inactive list.

Printouts, output reports. Destroy when superseded, obsolete or no longer needed for reference.