

REQUEST FOR RECORDS DISPOSITION AUTHORITY (See Instructions on reverse)		LEAVE BLANK (NARA use only)	
TO NATIONAL ARCHIVES and RECORDS ADMINISTRATION (NIR) WASHINGTON, DC 20408		JOB NUMBER	NI-51-03-2
1 FROM (Agency or establishment) EXECUTIVE OFFICE OF THE PRESIDENT		DATE RECEIVED	12/12/02
2 MAJOR SUBDIVISION OFFICE OF MANAGEMENT AND BUDGET		NOTIFICATION TO AGENCY	
3 MINOR SUBDIVISION OA RECORDS MANAGEMENT OFFICE		In accordance with the provisions of 44 U.S.C. 3303a the disposition request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10	
4 NAME OF PERSON WITH WHOM TO CONFER Nell Doering	5 TELEPHONE (202) 395-6471	DATE 9-23-03	ARCHIVIST OF THE UNITED STATES <i>[Signature]</i>
6 AGENCY CERTIFICATION I hereby certify that I am authorized to act for this agency in matters pertaining to the disposition of its records and that the records proposed on the attached _____ page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified, and that written concurrence from the General Accounting Office, under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies, <input checked="" type="checkbox"/> is not required, <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested			
DATE 11/20/02	SIGNATURE OF AGENCY REPRESENTATIVE <i>Nell W. Doering</i>	TITLE OA/OMB RECORDS MANAGEMENT OFFICER	

7 ITEM NO	8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	Office of Management and Budget Word Perfect Office and QuickMail E-Mail Records for Management Division, Office of Federal Procurement Policy and Health and Income Maintenance Division (IBM PS/2 Model 80 and Macintosh Operating System)		

SA Copies sent to Agency, NWMI, NWMC

EXECUTIVE OFFICE OF THE PRESIDENT
OFFICE OF MANAGEMENT AND BUDGET

This schedule applies to the IBM PS/2 Model 80 and the Macintosh Operating System in the Office of Management and Budget (OMB), Executive Office of the President.

WORD PERFECT OFFICE AND QUICKMAIL APPLICATIONS

The following applies to the records created or received on OMB's electronic communication systems.

1. **E-Mail Records.** E-mail messages created or received on the electronic communications systems that have been determined to be Federal records. E-mail records include transmission data (identities of sender and recipient(s) and the date of transmittal) and receipt data (when necessary). The records consist of the message and any attachments.

A. Management Division Master Data File of all E-Mail Records Data.

Inclusive Dates: November 2, 1992 through June 15, 1993.

Arrangement Statement: E-mail messages are arranged alphabetically by sender's name, then chronologically by date the message was sent.

Statement of Restrictions: These records may be subject to the restrictions in the Freedom of Information Act (5 U.S.C. 552) and the Privacy Act (5 U.S.C. 552a).

Current Volume: 1 CD.

Estimate of Annual Accumulation: Not applicable.

DISPOSITION: PERMANENT

Transfer Master Data File to NARA in accordance with 36 CFR 1228 upon approval of this schedule.

B. Office of Federal Procurement Policy Master Data File of all E-Mail Records Data.

Inclusive Dates: November 2, 1992 through June 15, 1993.

Arrangement Statement: E-mail messages are arranged alphabetically by sender's name, then chronologically by date the message was sent.

Statement of Restrictions: These records may be subject to the restrictions in the Freedom of Information Act (5 U.S.C. 552) and the Privacy Act (5 U.S.C. 552a).

Current Volume: 1 CD.

Estimate of Annual Accumulation: Not Applicable.

DISPOSITION: PERMANENT

Transfer Master Data File to NARA in accordance with 36 CFR 1228 upon approval of this schedule.

C. Health and Income Maintenance Division Master Data File of all E-Mail Records Data.

Inclusive Dates: November 1, 1992 through July 30, 1993.

Arrangement Statement: E-mail messages are arranged alphabetically by sender's name, then chronologically by date the message was sent.

Statement of Restrictions: These records may be subject to the restrictions in the Freedom of Information Act (5 U.S.C. 552) and the Privacy Act (5 U.S.C. 552a).

Current Volume: 1 CD.

Estimate of Annual Accumulation: Not Applicable.

DISPOSITION: PERMANENT

Transfer Master Data File to NARA in accordance with 36 CFR 1228 upon approval of this schedule.

NOTE: The electronic versions of E-Mail Records (Word Perfect Office and QuickMail) no longer exist because the "Live" system is no longer in operation. E-Mail Records (Word Perfect Office and QuickMail) in 1.A., 1.B., and 1.C. above were restored from backup tapes.

NOTE: Word Perfect Office and QuickMail word processing documents that were determined to be Federal records were copied and filed in the official recordkeeping system.

NOTE: Those restored records in 1.A., 1.B., and 1.C. above include nonrecord material and temporary Federal records about routine, short-term day-to-day administrative matters such as civilian personnel, fiscal accounting, procurement, travel and transportation, communications, printing, and other internal housekeeping activities that are unrelated to the official program functions of an office and add no substantial information to the agency official administrative records, but were not deleted during restoration

NOTE: User Directory. The user directory was an electronic feature of the Word Perfect Office and QuickMail applications that provided users with a short-cut to entering the name of the intended recipient of a message. This was a dynamically changing list of system users only; it was not an index or finding aid to messages. See Item 2 below for the **E-Mail Indices**.

NOTE: User Distribution Lists. The user distribution list feature of the Word Perfect Office and QuickMail applications allowed users to create or delete distribution lists for sending e-mail messages to groups of recipients. These dynamically changing lists were resident on the "Live" system and no longer exist as a viable function.

NOTE: User Indices. These were lists on the Word Perfect Office and QuickMail applications of e-mail messages sent and received by Word Perfect Office and QuickMail users. These dynamically changing lists were resident on the "Live" system, and had no enduring value.

- D. E-Mail Records Documentation.** The documentation for each data file (1.A., 1.B., and 1.C. above) will include any additional information about the format of the data file and/or the context in which the data file was created.

Inclusive Dates: November 1, 1992 through July 30, 1993.

Current Volume: Less than one cubic foot.

DISPOSITION: PERMANENT

Transfer a copy of the electronic mail records documentation to NARA with the records described in 1.A., 1.B., and 1.C. above upon approval of this schedule.

NOTE: All transfers of documentation will conform with requirements of 36 CFR 1228 and NARA procedures.

2. E-Mail Indices.

- A. Management Division E-Mail Index.** List of the message sender's name and message date of the Management Division e-mail messages.

Inclusive Dates: November 2, 1992 through June 15, 1993.

Arrangement Statement: Alphabetically by sender's name, then chronologically by message date.

Statement of Restrictions: There are no access restrictions.

Current Volume: 1 CD.

DISPOSITION: PERMANENT

Transfer data with Item 1.A. above.

- B. Office of Federal Procurement Policy E-Mail Index.** List of the message sender's name and message date of the Office of Federal Procurement Policy e-mail messages.

Inclusive Dates: November 2, 1992 through June 15, 1993.

Arrangement Statement: Alphabetically by sender's name, then chronologically by message date.

Statement of restrictions: There are no access restrictions.

Current Volume: 1 CD.

DISPOSITION: PERMANENT

Transfer data with Item 1.B. above.

- C. Health and Income Maintenance Division E-Mail Index.** List of the message sender's name and message date of the Health and Income Maintenance Division e-mail messages.

Inclusive Dates: November 1, 1992 through July 30, 1993.

Arrangement Statement: Alphabetically by sender's name, then chronologically by message date.

Statement of restrictions: There are no access restrictions.

Current Volume: 1 CD.

DISPOSITION: PERMANENT

Transfer data with Item 1.C. above.

D. E-Mail Indices Documentation. (Part of E-Mail Records Documentation, 1.D. above).

- 3. Backup Tapes.** Backup tapes created during November 1992 through July 30, 1993, of the IBM PS/2 Model 80 System and the Macintosh Operating System, include system and Word Perfect Office and QuickMail software, Federal applications, consisting of e-mail messages, copies of temporary records, nonrecord materials, distribution lists, indices, calendar shells with no data, and records that are duplicated elsewhere for preservation and disposition.

DISPOSITION: TEMPORARY

File identical to records scheduled for transfer to the National Archives. Delete when the identical records have been captured in a subsequent backup file or when the identical records have been transferred to the National Archives and successfully copied.