

National Archives and Records Administration
REQUEST FOR DISPOSITION AUTHORITY

Records Schedule Number: DAA-GRS-2016-0007

Status: APPROVED
Date Approved: 10/17/2016
Last Modified: 11/07/2024

General Information

Agency or Establishment	General Records Schedules (National Archives and Records Administration)
Record/Scheduling Group	GRS - General Records Schedules
Records Schedule Applies To	Government-wide All agencies except:
Schedule Subject	Additions to General Records Schedule 2.5: Employee Separation Records
Additional Schedule Information	Note: This schedule was modified after approval in ERA Base. If information regarding the modifications was created in ERA Base it will be found in the Revision Notes in NARA only attachments.
Is There a Classified Version of This Schedule?	No
Is consultation and coordination with Tribal Governments required?	Predate requirement

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Item Count

Total number of disposition items: 2

Number of Temporary disposition items: 2

Number of Permanent disposition items: 0

Number of Items with Disposition Not Approved: 0

Number of Inactive disposition items: 0

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Outline of Records Schedule Items for DAA-GRS-2016-0007

Item #	Title	Disposition
0001	Phased retirement administrative records.	Temporary
0002	Phased retirement individual case files.	Temporary

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Records Schedule Items

DAA-GRS-2016-0007-0001		STATUS: Active
ITEM GENERAL INFORMATION		
Item Title	Phased retirement administrative records.	
Item Description	<p>Records related to managing the program, including:</p> <ul style="list-style-type: none"> • procedural guidance on program administration • informational/marketing/publicizing materials • general correspondence • reports to OPM • memoranda of understanding (MOU) and significant documentation of bargaining unit negotiations • documentation of program structure and details as uniquely instituted by agency <p>Exclusion: This item does not cover records held at the OPM office overseeing the phased retirement program for the entire Government.</p>	
Is this item media neutral?	Yes	
Is this item a Big Bucket?		
MANUAL CITATION		
Agency Code	GRS 2.5, item 050	
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS		
Does this item supersede existing disposition authorities?	No	
Is this item a deviation from the GRS?	No	
DISPOSITION INSTRUCTION		
Final Disposition	Temporary	
Retention Period	Other: Destroy when 3 years old or 3 years after revision or replacement, as appropriate, but longer retention is authorized if required for business use.	
ADDITIONAL INFORMATION		
Are any of the records covered by this item national security classified?		
GAO Approval Required	No	

DAA-GRS-2016-0007-0002	STATUS: Active
ITEM GENERAL INFORMATION	

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Item Title	Phased retirement individual case files.
Item Description	<p>Case files of individual employee participation in phased retirement, such as:</p> <ul style="list-style-type: none"> • application for immediate retirement • evidence of eligibility • reviews/recommendations by supervisor and others • notice of approval or disapproval • retirement benefit estimates • annuity calculations • phased retirement agreement • records documenting knowledge transfer activities • confidentiality agreement with mentees • action/project plans and logs • correspondence <p>Note: Agencies may choose to file these records with the employee's retirement file, in which case the agency should retain them according to the retention period for the retirement file, per GRS 2.5, item 020.</p> <p>Exclusion: This item does not cover records held at OPM concerning staff at other agencies.</p>
Is this item media neutral?	Yes
Is this item a Big Bucket?	
MANUAL CITATION	
Agency Code	GRS 2.5, item 051
SUPERSEDED AGENCY DISPOSITION AUTHORITIES AND GRS DEVIATIONS	
Does this item supersede existing disposition authorities?	No
Is this item a deviation from the GRS?	No
DISPOSITION INSTRUCTION	
Final Disposition	Temporary
Retention Period	Destroy 1 year(s) after employee participation concludes, but longer retention is authorized if required for business use.
ADDITIONAL INFORMATION	
Are any of the records covered by this item national security classified?	
GAO Approval Required	No

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Signatory Information

Action	User	Date
Approve	David Ferriero	10/17/2016