

REQUEST FOR RECORDS DISPOSITION AUTHORITY		JOB NUMBER <i>NI-064-07-3</i>	
To: NATIONAL ARCHIVES AND RECORDS ADMINISTRATION 8601 ADELPHI ROAD COLLEGE PARK, MD 20740-6001		Date received <i>3/27/07</i>	
1 FROM (Agency or establishment) National Archives and Records Administration		NOTIFICATION TO AGENCY	
2 MAJOR SUBDIVISION Office of Administrative Services		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request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10	
3 MINOR SUBDIVISION National Archives Trust Fund Division (NAT)			
4. NAME OF PERSON WITH WHOM TO CONFER Laurence C. Patlen	5. TELEPHONE NUMBER 301-837-2038	DATE <i>6/14/07</i>	ARCHIVIST OF THE UNITED STATES <i>Allen W. [Signature]</i>
<p>6. AGENCY CERTIFICATION</p> <p>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 for disposal on the attached <u> 2 </u> page(s) are not needed now for the business for 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,</p> <p><input checked="" type="checkbox"/> is not required <input type="checkbox"/> is attached, or <input type="checkbox"/> has been requested</p>			
DATE MAR 21 2007	SIGNATURE OF AGENCY REPRESENTATIVE <i>[Signature]</i>		TITLE NARA Records Officer
7 ITEM NO	8 DESCRIPTION OF ITEM AND PROPOSED DISPOSITION	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN (NARA USE ONLY)
	<p>Function: Order Fulfillment Process ("Trust Fund side") including OFAS.</p> <p>1805 Order Fulfillment / OFAS and Related Records</p> <p>(See attached pages)</p>		
<i>SA 6/15/07 copies sent to Agency, NWMD, NAWM, NAWCT, NR</i>			

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1805 Order Fulfillment / OFAS and Related Records

Records documenting customer orders for products and services, and related reports and summaries for administration of the National Archives Trust Fund. Orders include those for researching and reproducing records, publications of popular documents (e.g., Census microfilm), and merchandise. Records document order entry, order fulfillment tracking, and payment. Includes orders placed at “point of sale” (walk-in), by phone, fax and mail, and those received via NARA’s web-based Order Online! system.

Item No	File No , Description	Superseded Job / item no
1.	1805-1 Order history file.	
a.	a. Order history file migrated from the legacy electronic system (1998-2000) <u>Disposition</u> : Delete immediately upon approval of this schedule.	N1-64-04-1, item 2 and 3
b.	b. Order history file – OFAS (starting in 2000) <u>Disposition</u> : Cut off annually. Delete when 3 years old.	N1-64-04-1, item 2 and 3
2.	1805-2 Order transaction files (regardless of source: Point of Sale entry, mail or fax order, or from the online ordering system).	
a.	a. Unpaid BillMe orders and Unapproved credit card orders that remain outstanding for more than 90 days. <u>Disposition</u> : Cut off at end of quarter. Delete 3 years after cutoff.	N1-64-04-1, item 2 and 3
b.	b. Paid Orders (Paid BillMe orders and approved credit card orders) and all other transaction records. Includes, but not limited to: <u>Customer Payments (Lockbox)</u> - Customer Payment data, database, and text files on the local network drive; <u>Point of Sale</u> - Records of walk-in (cash and carry) transactions (includes orders mailed to a regional office); <u>Transaction History</u> (Receivables Management and Customers) Includes transaction and distribution history, receivables distribution history, period history and journal history; <u>General Ledger</u> - Records of all posted (completed) transactions, and: <u>Sales Order Processing History</u> <u>Disposition</u> : Cut off at end of quarter. Delete 3 years after cutoff.	N1-64-04-1, item 2 and 3
3.	1805-3 Summaries and statistical reports derived from data on the system. This information does not include individual identification of customers. <u>Disposition</u> : Cut off annually. Destroy when 3 years old or when no longer needed.	N1-64-04-1, item 1

4.	1805-4 System documentation (OFAS) Data, file, and output specifications and user guides. <u>Disposition</u> : Cut off at end of year in which system documentation is superseded or obsolete. Destroy/delete 2 years after cutoff.	---
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NHR: LcP OFAS compil final.doc 3/23/2007