

INACTIVE - ALL ITEMS SUPERSEDED OR OBSOLETE

Schedule Number: NC1-352-81-02

All items in this schedule are inactive. Items are either obsolete or have been superseded by newer NARA approved records schedules.

Description:

During a comprehensive rescheduling effort beginning in 2016 and culminating in 2019. All authorities on this schedule were superseded by this body of disposition authorities.

Office of General Counsel Records (269.2) DAA 0269 2016 0001
Budget, Finance, and Contractor Management Program Records (269.3) DAA 0269 2016 0004
Office of the Inspector General (269.4) DAA 0269 2015 0002
Civilian Board of Contract Appeals Program Records (269.5) DAA 0269 2016 0002
Professional Services To and With Other Agencies (269.6) DAA 0269 2016 0012
Internal Information Technology Services to GSA (269.7) DAA 0269 2016 0011
Program Management Records (269.11) DAA 0269 2016 0006
Communications Records (269.12) DAA 0269 2016 0007
Legislative and Congressional Affairs Records (269.13) DAA 0269 2016 0008
Audit Resolution Program Records (269.14) DAA 0269 2016 0003
Customer Service / Business Development Records (269.15) DAA 0269 2016 0013
Human Resources Program Records (269.16) DAA 0269 2016 0009
Security Records (269.17) DAA 0269 2016 0010
Public Building Service Records DAA 0121 2015 0001

Date Reported: 04/02/2019

INACTIVE - ALL ITEMS SUPERSEDED OR OBSOLETE

CO 229028744

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

LEAVE BLANK	
JOB NO NC1-352-81-2	
DATE RECEIVED April 22, 1981	
NOTIFICATION TO AGENCY In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10	
4-11-83 Date	<i>[Signature]</i> Archivist of the United States

TO GENERAL SERVICES ADMINISTRATION,
NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408

1. FROM (AGENCY OR ESTABLISHMENT)
General Services Administration

2. MAJOR SUBDIVISION
Automated Data Telecommunication Service

3. MINOR SUBDIVISION

4. NAME OF PERSON WITH WHOM TO CONFER
Ray Hershberger

5. TEL. EXT
566-0673

6. CERTIFICATE OF AGENCY REPRESENTATIVE.

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 23 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified.

- A Request for immediate disposal.
- B Request for disposal after a specified period of time or request for permanent retention.

C. DATE 4/20/81	D. SIGNATURE OF AGENCY REPRESENTATIVE <i>William Heibert</i>	E. TITLE Chief, Records Management Branch
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7. ITEM NO.	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
	ADP Management Services Program Records) Changes to the descriptions, deletions, and disposition schedules are contained in the enclosed chapter 27 to the GSA Records Maintenance and Disposition System (OAD P 1820.2).	NN170-51 HB,	
NEW sent 9-12-83 by DMW.			78

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607569A
139487

MASS DATA CHANGE SHEET WILL BE FORWARDED WITH PRINTED CHANGE

CHAPTER 27. ADP MANAGEMENT SERVICES
PROGRAM RECORDS

1. General. This chapter provides descriptions of, and maintenance and disposition instructions for, program records documenting automatic data processing (ADP) management and operation. These functions are concerned with providing for the economic and efficient purchase, lease, operation, use, sharing, transfer, and maintenance of automatic data processing equipment, supplies, and services both internally and throughout the Federal Government. These records, hereafter referred to as "Automated Data and Telecommunications Services (ADTS) program records," are created as a result of responsibilities set forth in the GSA Organization Manual (OHR P 5440.1). ADTS program records as they relate to ADP and ADTS programs are accumulated by the Central Office and regional counterparts. Documentation, maintenance, and disposition instructions are contained in:

Appendix 27-A. General ADP Management Program Records

Appendix 27-B. ADP Procurement Program Records

Appendix 27-C. ADP Program Development and Assistance Records

Appendix 27-D. ADP Resources and Inventory Management
Program Records

Appendix 27-E. Internal ADP Program Records

Appendix 27-F. ~~Withdrawn by CHGE~~

2. Reserved.

This appendix provides documentation, maintenance, and disposition instructions for records that accumulate in most ADP program areas. These records, hereafter referred to as general ADP management program records, are accumulated by the Central Office and, to a more limited extent, by counterpart elements in the regions.

27A1. ADP projects. Documents accumulated as a result of projects, investigations, studies, and tests conducted either in-house or under contract, but not specific files described elsewhere in this chapter. These projects are basically of two types: (a) Projects to develop scientific, technical, or quantitative data on ADP equipment, supplies, and applications and (b) projects to develop and recommend methods for increasing the efficiency, economy, and accuracy of; reducing the cost of; or otherwise improving ADP operations. Included are project assignment documents, progress reports, test reports, final project reports, related correspondence, and similar records.

- a. Office at the Central Office making the study: Withdraw and place in inactive file on completion of project, hold 2 years, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Destroy when 2 years old.

Note.—Files relating to projects, the results of which provide the basis for, or result in the preparation of, a directive or other instruction, should be withdrawn and filed in 9C2, Instructions file, or forwarded to the directives clearance officer for inclusion in 11B25, Directive case files, whichever is appropriate. When this is done, appropriate cross-references should be placed in the ADP project files.

27A2 - 27A4. Reserved.

27A5. ADP management surveys. Documents created as a result of ADP staff surveys of regional operations. These surveys are made to exchange views, secure mutual understanding, determine needed changes in programs and standards, evaluate operations, identify problem areas, and recommend remedial action. Included are survey schedules, notices of impending surveys, completed checklists, preliminary and final reports, and related records.

- a. Survey schedules: Cut off annually, destroy when 1 year old.
- b. Other records: Destroy on completion of the next comparable survey.

This appendix provides documentation, maintenance, and disposition instructions for ADP procurement program files. The ADP procurement program is concerned with procuring, assisting in the procurement of, and developing and issuing criteria and guidelines for the procurement of ADP systems for Government agencies. These records are accumulated by the Central Office and, to a lesser extent by counterpart elements in the regions.

27B1. ADP procurement assistance files. Documents accumulated in assisting Federal agencies in the execution of their ADP purchasing and contracting effort, including assistance in negotiating contracts. This file category does not include GSA "official" contract files.

Cut off annually, destroy when 3 years old.

27B2 - 27B4. Reserved.

27B5. ADP procurement studies. Documents accumulated in conducting studies, including cost and market research analyses, to ensure economic purchase, lease, or rental of ADP equipment or services. Included are studies, research analyses, recommendations, and related records.

Cut off annually following completion or cancellation of the study, hold 2 years, and retire to FRC. Destroy when 5 years old.

27B6 - 27B9. Reserved.

27B10. ADP contract files. Documents accumulated in advertising for bids; soliciting proposals; evaluating bids and proposals; disposing of protests; and negotiating, awarding, administering, and terminating contracts for the purchase, rental, lease, and maintenance of ADP equipment, supplies, and services. Included are procurement requisitions; invitations for bids; requests for proposals, copies of bidder's lists; documents reflecting responses; offers received; evaluations; record of negotiation; successful bids; notifications of award; notifications of no award and related documents; contract administration or termination documents; and contract case files, including related purchase orders, receiving reports, inspection reports, shipping documents, similar documents, and related records.

- a. Cut off at end of fiscal year following completion of contract as indicated by delivery and acceptance of all equipment or services, or termination, hold 1 year, and retire to FRC. Destroy when 6 years old.
- b. Documents accumulated in conducting procurement for other agencies which are not transferred with official contract files to agencies: Cut off at end of fiscal year following transfer, hold 1 year, and retire to FRC. Destroy when 6 years old.

27B11 - 27B14. Reserved.

27B15. Bidder's mailing lists. Documents accumulated in establishing and maintaining lists of business concerns interested in receiving invitations to bid on

supplying ADP equipment, supplies, or services. Included are mailing list applications, preinvitation notices, requests for removal of names from mailing lists, similar documents, and related records.

- a. Mailing lists: Destroy when superseded or obsolete.
- b. Other records: Cut off annually, destroy when 1 year old.

27B16 - 27B19. Reserved.

27B20. Unsuccessful bids. Unsuccessful or rejected bids received from suppliers of ADP equipment, supplies, and services.

Cut off annually, hold 1 year, ~~and retire to FRG. Destroy~~ *and destroy in accordance with*
~~when 6 years old.~~ *GRS 3; Item 6A.*

27B21 - 27B24. Reserved.

27B25. Federal Supply Schedule/ADP Schedule production records. Documents accumulated in scheduling, monitoring, and accomplishing each step in the development and distribution of Federal Supply Schedules, ADP schedules, notices, and amendments. These steps include developing terms and conditions; preparing solicitations for offers; opening and tabulating offers; negotiating Federal Supply Schedule or ADP schedule contracts; executing and reporting contract awards; administering and/or terminating schedule contracts; developing, producing, and distributing the Federal Supply Schedules, ADP schedules, special notices, and amendments; and similar or related actions.

Cut off annually, destroy when 6 years old.

27B26 - 27B29. Reserved.

27B30. Federal Supply Schedule, ADP Schedule, and price list distribution lists. Documents accumulated in establishing and maintaining lists of Government agencies interested in receiving Federal Supply schedules, ADP schedules, and related contractors' price lists for ADP equipment or services. Included are requests to be placed on distribution lists and similar documents.

Destroy when superseded or obsolete.

27B31 - 27B34. Reserved.

27B35. Federal Supply Schedule (ADP) history files. These files consist of one copy of each ADP Federal Supply Schedule and ADP schedule price list and amendments thereto.

- a. Central Office: Cut off annually following completion of contract, hold 2 years, and retire. Destroy when 10 years old.

b. Other offices: Destroy when no longer needed for reference. |

27B36 - 27B39. Reserved.

27B40. Contract copy files. Copies of requests for proposals, orders, and contracts which are received from other agencies, reviewed, analyzed, and used as a basis for improving Federal Supply Schedule or ADP schedule contracts or other ADP negotiation actions. |

Cut off annually, destroy when 2 years old.

27B41 - 27B44. Reserved.

27B45. Contractor performance files. Documents received, primarily from other Federal agencies and activities, that reflect contractor performance in terms of responsiveness and hardware, software, and consultative capability. These documents are maintained in a central repository for use in future contract negotiations. |

Review annually and destroy documents that are obsolete or no longer applicable; destroy the entire folder(s) when the concern is no longer a potential contractor.

27B46 - 27B49. Reserved.

27B50. New ADP products supply files. Documents created in monitoring and advising on new and improved ADP products and in coordinating their introduction into the supply system.

Cut off annually, destroy when 3 years old. |

This appendix provides documentation, maintenance, and disposition instructions for records documenting ADP program development and technical assistance functions. These functions are concerned with studying and analyzing Federal ADP requirements; developing and providing ADP educational programs; developing, coordinating, and issuing ADP standards, specifications, purchase descriptions, maintenance criteria, and similar guidelines; and providing information or consultation services in response to requests. These records, hereafter referred to as ADP program development and assistance files, are accumulated by the Central Office and by regional counterparts.

27C1. ADP technical assistance. Documents accumulated in assisting other agencies in developing specifications, resolving problems encountered due to nonavailability of ADP resources, offering suggestions and recommendations to ADP installations of other Federal agencies, and similar matters.

Cut off annually, destroy when 3 years old.

27C2 - 27C4. Reserved.

27C5. ADP standardization files. Documents relating to the preparation, coordination, approval, maintenance, and cancellation of ADP standards and specifications, including documents concerning the coordination and adoption of industry or technical association ADP standardization documents. Included are standardization project assignment documents, clearance actions, drawings, agenda and minutes of meetings, study project reports, record copies of the published standardization documents and communications relating to them, and related records.

- ADP files for ORAR 2/2/77.*
- a. Office responsible for preparation of the ADP standard:
Cut off annually, hold 2 years, and retire to FRC.
Destroy when ~~30~~⁵ years old.
 - b. Other offices: Cut off annually, destroy when 2 years old.

27C6 - 27C9. Reserved.

27C10. ADP purchase descriptions. Documents accumulated in preparing, reviewing, and promulgating ADP purchase descriptions for procurement of equipment and supplies not covered by Federal specifications. Included are proposed purchase descriptions, clearance actions, copies of the purchase descriptions, and related records.

Destroy when canceled or obsolete.

27C11 - 27C14. Reserved.

27C15. ADP training files. Documents accumulated in coordinating and/or accomplishing the development and provision of training programs in ADP subject areas. Included are training texts, training agreements with other Federal agencies, similar documents, and related records, but not files relating to the development of films.

- a. Training texts and supporting papers: Cut off annually when the course is canceled or obsolete, hold 1 year, and retire to FRC. Destroy when 3 years old.
- b. Other records: Cut off annually, destroy when 1 year old.

OAD P 1820.2 CHGE

27C16 - 27C19. Reserved.

27C20. ADP films. Films, including documents related to their development, approval, release, and presentation, prepared to promote and provide orientation of the Government-wide ADP management program. Included are proposals, copies of production contracts scenarios, review comments, approvals, "record copies" of the films, documents requesting and arranging presentations, similar documents, and related records.

- ADP films
NED KSPV*
- a. The record copy of the film and all records related to the development of the film ~~shall be sent to the National Audiovisual Center, NAC.~~ *Destroy when no longer needed.*
 - b. Other records: Cut off annually, destroy when 2 years old.

27C21 - 27C24. Reserved.

27C25. ADP technological development files. Documents created in monitoring technological developments and providing information thereon to other Federal agencies for use in planning their ADP programs. Included are brochures and circulars, communications with manufacturers and representatives of Federal agencies, similar documents, and related records.

- a. Brochures, circulars, and the like: Destroy when superseded or obsolete.
- b. Other records: Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old.

27C26 - 27C29. Reserved.

27C30. Technical information requests. Documents accumulated in providing comparative information on characteristics and performance capabilities of ADP equipment, software, and related services to executive agencies for use in connection with the selection of equipment. Included are requests, replies thereto, and related records.

Cut off annually, destroy when 2 years old.

27C31 - 27C34. Reserved.

27C35. Withdrawn by CHGE. *(Superseded by 55I80)*

27C36 - 27C39. Reserved.

27C40. Withdrawn by CHGE. *(Superseded by 55I85)*

27C41 - 27C44. Reserved.

27C45. Computer program publications. Hard copy documents accumulated in collecting, compiling, maintaining, and disseminating computer programs, library routines, and executive routines, including translations, and simulations thereof. This file category covers specially prepared publications as distinguished from papers relating to 9C2, Instructions files. Included are record copies of the issued program publications and related supporting records.

Place in inactive file on cancellation or obsolescence of the program, hold 1 year, and retire to FRC. Destroy when
5 10 years old or sooner if authorized by the IG.

*Alphabetic
no per ORAA
7-16-83*

This appendix provides descriptions of, and maintenance and disposition instructions for, program records documenting the management of ADP resources. This function involves the establishment and maintenance of a perpetual Government-wide inventory of ADP equipment, software, and facilities; establishment and operation of exchanges to coordinate the sharing of ADP resources among Government agencies and activities; and matching of resources with requirements. These records, hereafter referred to as ADP resources and inventory management program records, are accumulated by the Central Office and counterparts in the regions.

Appendix 27-D. ADP Resources and Inventory Management Program
Records

27D4. ADP organization files. Documents accumulated in establishing, modifying, relocating, and disestablishing ADP sharing exchanges, service centers, and equipment pools. Included are feasibility studies, recommendations, justifications, clearance actions, final determinations, agreements, and related records. |

- a. Central Office: Cut off annually following discontinuance of the organization or determination not to establish it, hold 1 year, and retire to FRC. Destroy when 5 years old. |
- b. Regional offices: Cut off annually, destroy when 2 years old. |

27D2 - 27D4. Reserved.

27D5. ADP service center exemptions. Documents accumulated in acting on requests for exemptions of ADP activities from participation in the ADP sharing program. Included are requests, justifications, approvals or disapprovals, and related records. |

- a. Central Office: Cut off annually, hold 1 year, and retire to FRC. Destroy when 5 years old. |
- b. Other offices: Cut off annually, destroy when 3 years old. |

27D6 - 27D9. Reserved.

27D40. ADP agreements and delegations. Documents accumulated in preparing agreements with, or letters delegating responsibility to, other Federal agencies to purchase, lease, and maintain ADP equipment; to operate ADP equipment pools and centers; or to perform other ADP operations. This file category is limited to agreements and delegations not reflected in directives or described elsewhere in this chapter. |

Cut off annually when canceled or obsolete, hold 2 years, and retire to FRC. Destroy when 5 years old. |

27D41 - 27D44. Reserved.

27D45. ADP resources availability files. Documents accumulated to provide information on location of Federal and commercial ADP facilities; ADP equipment on hand; equipment hours used and available; and programs, applications, and personal services available. These documents (received from ADP activities) are used in directing service requests to the activities having the resources required and in preparing and updating the ADP inventory listings. Included are reports and records related to them. |

Destroy when superseded or obsolete. |

27D16 - 27D19. Reserved.

27D20. ADP service requirements. Documents accumulated in recording and maintaining ADP resource requirements of Federal activities. This file category is limited to unfilled requirement statements or "open" service requests. Included are ADP service requests, notifications of needs, memorandums of telephone calls, similar records, and related documents. |

- a. Filled ADP service of requests: Withdraw when agreement for provision of service is reached, complete the form, and return it to the requesting agency.
- b. Noncurrent requirements: Destroy when revised, canceled, or obsolete. |

27D21 - 27D24. Reserved.

27D25. ADP services requests. Documents reflecting contacts, arrangements, and negotiations with ADP service centers to provide services requested by other Federal activities in the area served by the sharing exchange. Included are completed ADP service requests (copies), records of negotiations and arrangements, and related records. |

Cut off annually, destroy when 1 year old.

27D26 - 27D29. Reserved.

27D30. ADP utilization reports. Documents reporting ADP resources or services provided through the sharing exchange or obtained from commercial sources. Included are ADP service center reports, sharing exchange consolidated reports, Government-wide reports, similar reports, and related records. |

- a. Government-wide reports in the office responsible for preparation: Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old. |
- b. Other reports: Cut off annually, destroy when 2 years old. |

27D31 - 27D34. Reserved.

27D35. ADP inventory reports. Reports or inventory listings of ADP resources which are prepared primarily to assist other Federal agencies in locating and obtaining ADP equipment time and services. Included are inventory listings, indexes, and quarterly consolidated listings; listings published by sharing exchanges; listings of departmental codes, computer models, and auxiliary equipment; changes; and similar records. |

Cut off annually, destroy when 5 years old.

27D36 - 27D39. Reserved.

27D40. Excess ADP equipment. Documents accumulated in reporting ADP equipment, including equipment leased with an option to buy as excess; screening reports of excess equipment for Federal use; authorizing transfers of excess equipment; and declaring equipment no longer needed as surplus. Included are notifications of equipment replacement plans, reports and notices of excess equipment, equipment transfer requests and authorizations, copies of surplus declarations, similar documents, and related records.

Cut off annually following determination not to release the equipment, termination of the lease, disposition as excess, or declaration as surplus; destroy when 3 years old.

27D41 - 27D44. Reserved.

27D45. ADP equipment excess notices registers. Registers used to record the circulation of notices of excess ADP equipment.

Cut off following final entry in register, destroy when 2 years old.

27D46 - 27D49. Reserved.

27D50. Excess equipment statistical reports. Documents created in preparing and submitting periodic reports reflecting statistical data about the transfer of excess ADP equipment and exchange sale of ADP equipment between Government agencies. Included are reports and papers directly related to them.

Cut off annually, destroy when 2 years old.

27D51 - 27D54. Reserved.

27D55. ADP information publications. Documents used to circulate information about the availability of ADP resources, the establishment and operation of sharing exchanges and service centers, excess ADP equipment, and similar matters. Included are ADP sharegrams, similar newsletters, and related records.

Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old.

This appendix describes records accumulated primarily as a result of providing ADP services for internal GSA use and in operating GSA data processing facilities. These records, hereafter referred to as internal ADP program files, are accumulated by the Central Office and counterpart elements in the regions. To a lesser extent, these records are also accumulated by offices of designated automatic data processing coordinators of services and staff offices.

27E1. ADP acquisition case files. Documents accumulated in planning for, selecting, evaluating, procuring, installing, and reviewing performance of automatic data processing equipment and major auxiliary items. Included are preliminary designs, feasibility and applications studies, systems specifications and reports of their review, manufacturer's proposals and evaluations thereof, installation documents, reports of readiness reviews and performance evaluations, and related records.

Cut off annually following installation of equipment or system or determination that equipment or system will not be installed, hold 2 years, and retire to FRC. Destroy when 5 years old.

27E2 - 27E4. Reserved.

27E5. ADP equipment requests. Documents accumulated in preparing requirements and justifications for ADP equipment, accessories, and modifications for which feasibility studies are not required for purchase. Included are requirements and justifications, annual equipment rental requisitions, copies of maintenance contracts, letters discontinuing leases, and related records.

Cut off annually, destroy when 2 years old.

27E6 - 27E9. Reserved.

27E10. ADP system files. Documents created in the planning; coordinating; preliminary, feasibility, application, and system design; testing; and maintenance of ADP or data conversion systems. Included are preliminary design documents and reports, feasibility and application design documents and reports, detailed system and test documents, staffing and economic studies, enhancement project requests, impact studies and other records relating to system maintenance, and related records.

- a. Office responsible for development of the system: Cut off annually, after the system installation date, and retire to FRC. Destroy when 5 years old.
- b. Other offices: Cut off annually following completion or discontinuance of design effort, destroy when 2 years old.

Note.--Record copies of system manual, including unpublished sections thereof, except program cards and tapes, should be identified and filed in accordance with instructions in 11B25, Directives case files.

27E11 - 27E14. Reserved.

27E45. Invoice certification. Documents accumulated by data processing offices in reviewing, certifying, and forwarding (to accounts payable) invoices and

OAD P 1820.2 CHGE

other documents related to billings for equipment leases and maintenance services. Included are billable time reports and meter readings, additional use authorizations, copies of vendor invoices, and related records.

Cut off annually, hold 1 year, and retire to FRC. Destroy when 4 years old.

27E46 - 27E19. Reserved.

27E20. Technical publication controls. Documents created in establishing requirements for, requesting, indexing, distributing, and handling other matters regarding technical publications. Included are requests for publications, documents reflecting requirements, distribution lists, indexing cards, and related records.

- a. Distribution lists: Destroy when superseded or obsolete.
- b. Index cards: Withdraw and destroy when superseded or canceled, or destroy with the related publication.
- c. Other records: Cut off annually, destroy when 1 year old.

27E21 - 27E24. Reserved.

27E25. Technical information memorandums. Documents created in preparing, clearing, and issuing technical information memorandums to disseminate information about hardware and software problems and solutions. Included are copies of technical information dispatches used in preparing the memorandums, clearance actions, record copies of the published memorandums, and records directly related to them.

Office responsible for preparation and issue: Cut off annually, hold 2 years, and retire to FRC. Destroy when 5 years old.

27E26 - 27E29. Reserved.

27E30. Technical information dispatches. Documents prepared to submit hardware and software problems, data processing system deficiencies, and data processing facts that are not readily known for inclusion and dissemination in published technical information memorandums. Included are technical information dispatches, similar documents, and related records.

Cut off annually, destroy when 2 years *old.*

27E31 - 27E34. Reserved.

27E35. Card and form stock inventories. Documents used to maintain inventories of ADP card and form usage and average demand so that economical quantities will be ordered.

Destroy when superseded or obsolete.

27E36 - 27E39. Reserved.

27E40. ADP supply files. Documents created in specifying requirements for, and coordinating the procurement of, tapes, punched cards, marginally punched custom-made forms, or comparable supplies. Included are specialized requirements for, justifications for, and notifications of actions taken regarding tape procurement; annotated card and form listings; and related records.

Cut off annually, destroy when 2 years old.

27E41 - 27E44. Reserved.

27E45. Tape reel inventories. Reports of inventories made to account for all tape reels maintained.

Cut off annually, destroy when 1 year old.

27E46 - 27E49. Reserved.

27E50. Tape transmittals. Documents created in transmitting tape and punched cards to regional and other offices, but not transmittal receipts described elsewhere in this appendix. Included are distribution letters and related records.

Cut off annually, destroy when 1 year old.

27E51 - 27E54. Reserved.

27E55. Tape control files. These files are used to identify, account for, and control the issue, receipt, location, transfer, and disposition of tapes. They consist of:

a. Reel number logs. Log books or similar documents used to record the assignment or permanent serial numbers to tapes and to serve as a running inventory of them.

Destroy when all reels reflected thereon have been disposed of or when information has been brought forward to a new book or sheet.

b. Reel history records. Cards or similar records used to identify and record each use of a tape throughout its lifetime.

Destroy 1 year after discontinued use of the related tape.

Note.--Reel history records should accompany tapes on permanent transfer between data processing divisions.

c. Tape file history records. Documents used to list all reels composing a tape data file and to indicate the status of the file at all times.

Destroy 60 days after expiration of the retention period for the related tape file.

d. Reels release approvals. Documents prepared to obtain and record approvals for the release of tapes for which retention cycles have expired.

Cut off in 3-month blocks, hold 3 months, and destroy.

e. Tape chargeout records. Tape chargeout forms prepared for each daily computer run.

Destroy 3 months after return of tape.

f. Program reference cards. Cards prepared for each computer run and which list the permanent input-output information applicable to the run.

Destroy 60 days after supersession of the card or discontinuance of the system.

g. Tape trouble records. Documents created to record damage to a tape due to wrinkling, scratching, or other cause so that damaged spots can be located and repaired. Included are tape trouble records and similar records.

Destroy 1 year after physical destruction or permanent transfer of the related reel.

h. Tape transmittal records. Documents used to requisition, transmit, receipt for, and follow up on tapes sent to other offices.

- (1) Receipt copies: Cut off annually, destroy when 1 year old.
- (2) Suspense copies: Destroy on return of the receipt copy or return of tape, except that suspense copies used for followup on returnable tapes will be filed and disposed of with receipt copies.
- (3) Recipient copies: Destroy on preparation of the reel and file history records.

27E56 - 27E59. Reserved.

27E60. Source documents. Source documents forwarded to data processing activities for card punch or other data conversion.

Return to the user unless instructed by the user to destroy in accordance with authorized disposition instructions.

27E61 - 27E64. Reserved.

27E65. ADP reports and tabulations. Retained copies of reports, tabulations, and other printouts prepared for, and submitted to, users.

Retain for two additional computer run cycles or as long as is required for error research and then destroy. Earlier disposal is authorized.

27E66 - 27E69. Reserved.

27E70. ADP operating records. These are documents relating to daily operations of automatic data processing activities. Descriptions of, and disposition instructions for, files included in this category are contained in a thru f, below:

a. ADP maintenance schedules. Documents reflecting scheduled maintenance for automatic data processing and punched card equipment. Included are preventative maintenance schedules, similar maintenance schedules, and directly related records.

Destroy after 1 year or when schedules are superseded, whichever is applicable.

b. Downtime maintenance records. Documents reflecting downtime resulting from preventative and remedial maintenance. These documents are maintained to determine trends in equipment malfunctions, to alert management for corrective actions, and to provide justification for adjustments to vendor billings. Included are records of applied time, remedial maintenance and rerun forms, and related records.

Cut off annually, destroy when 2 years old.

c. Job number registers. Registers or other documents used to record numbers assigned to, and descriptions of, each job.

Destroy when jobs listed thereon have been discontinued or when information is transferred to a new page or sheet.

OAD P 1820.2 CHGE

d. Compile, assemble, and test logs. Logs used by programers and operators to enter individual requests, job numbers, test time, and other data.

Destroy 3 days after runs are completed.

e. System operation histories. Documents reflecting, for each production cycle of a system, significant comments regarding impact of the current cycle on the test cycle, job aborts, reruns, control imbalances, observed errors or inconsistencies, and related matters. Included are operations system history records and similar records.

Destroy on discontinuance of the related system.

f. Reject and override files. Documents accumulated as a result of reviewing console printouts to detect and record label rejects or file release overrides made by operations personnel. Included are copies of technical information dispatches documenting the overrides and similar records. |

Cut off annually, destroy when 1 year old.