

## Property Management Office Records Retention Schedule

(Contact person: Bob Hansen: 5-0103)

DESCRIPTION	CUSTODIAN	RETENTION REQUIREMENTS (yrs.)			OFFICIAL?	CONFID.?	VITAL?	CURRENT RECORD FORMAT	DUPLICATED ELSEWHERE?	SAFEGUARD MEASURES CURRENTLY IN PLACE?
		LEGAL	ACTIVE	NON- ACTIVE						
		(CY: Current Yr)								
Line Books-Assets Prior to on-line system	N/A		Lifetime of longest lived asset	No longer active	No	No	No	Paper		
Dept. audit Yr. tracking	PMO	State-3 Federal-3	CY + 5	1	Yes	No	No	PC/Server		
Supporting Material Books	PMO	State-3 Federal-3	CY + 5	1	Yes	No	No	Paper		
Year End Reports-Index & Sum, G3's	PMO	State-3 Federal-3	CY + 5	1	Yes	No	No	Some on PC & Paper		
PMO Snapshot of Yr. End	PMO	State-3 Federal-3	CY + 5	1	Yes	No	No	Microfiche		
Account Books-back to mid 50's	Accounting Services	N/A	Until vintage assets are retired	No longer active	No	No	No	Paper		
Biennial Inventories from Dept's	PMO	State-3 Federal-3	CY + 5	3	Yes	No	No	Paper		
Depreciation	PMO	State-3 Federal-3	CY + 5	5		No	No	Server tape & Paper		
Gifts	Accounting Services	N/A	CY + 5	1	Yes	Yes *	Yes *	Paper	Yes	
Sales	PMO	State-3 Federal-3	CY + 5	1	Yes	No	No	Paper		
DOE Used Equipment			CY + 5	1		No	No	Paper		
Office Correspondence of an Official Nature	PMO	State-3 Federal-3	Permanent		Yes	No	No	Paper, PC	No	
NOTES:										
1) The retention period for convenience copies is 3 years which is a guideline and not a requirement.										
2) The custodian has official responsibility for retention and disposition of the record.										
3) An "Official Record" is the single official copy of a document maintained on file by an administrative unit of FUS which is usually, but not always, the original.										
Convenience copies are not official records.										
4) A "Confidential Record" is unavailable to the general public unless otherwise ordered by court, by the lawful custodian or by another person duly authorized.										
Medical, student and personnel files are examples.										
5) A "Vital Record" is one which is absolutely essential in order to continue doing business or to preserve the rights of the unit, its employees and the general public.										
6) "Office Correspondence of an Official Nature" refers to policies, procedures, reports (internal or external), etc. that are used in the administration and management of the department and that should be memorialized.										