

Pennsylvania Office of Administration  
Office of Enterprise Records Management  
Records Retention and Disposition Schedule  
Approved by the Executive Board

Records Retention and Disposition Schedule  
By Bureau

3/16/2016

**Agency:** 000                      General Retention Schedules  
**Bureau:** G006                    Training

Item Number	Description	Media Code	Vital Record	Agency Retn	SRC Retn	Disp Code
G006.001	Course Information Records  Memoranda, flyers, announcements, catalogs, and other records related to the advertisement and management of agency training courses. May include, but is not limited to: information on course content, program registration and sign-in, instructor, credits, and hours.  * AGY - Retain three (3) years or as long as of administrative value.	M	No	3Y	0Y	1
G006.002	Training Files  Course material developed and gathered for use in training. May include, but is not limited to: reference material, outlines, handouts, notes, evaluations, overheads, audio/videos, computerized presentations, answer keys, and feedback forms.  * AGY - Retain three (3) years or as long as of administrative value.	M	No	3Y	0Y	1
G006.003	Training Needs Assessment  Training plans, training development, and assessments on employee training needs.  * AGY - Retain three (3) years or as long as of administrative value.	M	No	3Y	0Y	1
G006.004	Out-Service Training Files  Approvals and requests for out-service training. May include, but is not limited to: survey on training/class evaluations as well as reimbursement forms, non-commonwealth provided training, schools and professional organizations.	M	No	3Y	0Y	3
G006.005	Training Records-Learning Management System  Employee training records in the Learning Management System that include date of course completion; instructor; session length; learning series' certification credits if applicable; instructor-led session; mandatory or other web-based training completion; record of compliance training completion; and out service training. Also includes, but is not limited to, summary of all training an employee has taken.  * AGY - Maintain until former employee's 75th birthday, then delete. If employee is 72 years of age or older when they retire; retain an additional four (4) years.	M	No	0Y	0Y	3

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Item Number	Description	Media Code	Vital Record	Agency Retn	SRC Retn	Disp Code
G006.006	Annual Agency Training Plans and Reports	M	No	3Y	0Y	3

Annual Agency Training Plans may include, but are not limited to, an agency's anticipated training needs and strategies for addressing those training needs. Annual Agency Training Reports describe an agency's training accomplishments for the previous fiscal year as compared to projections from the Annual Agency Training Plan.