

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: G008 Records/Forms Management

Item Number	Description	Media Code	Vital Record	Agency Retn	SRC Retn	Disp Code
G008.001	<p>Records Management</p> <p>Records documenting the creation, management, flow and disposition of state government records in accordance with state records management laws, policies, procedures and practices. Includes, but is not limited to:</p> <ul style="list-style-type: none"> • General and agency-specific records retention and disposition schedules; • Reports, including audit reports, assessment and performance; • Guidelines; • Directives; • Forms used for records inventory and scheduling; • Records transfers; • Microfilm and filing equipment requests; Reference requests; • Disposal notices; • Vital records inventories; • Special studies; • Agency worksheets/notes; and • Agency file plans. <p>* AGY - Retain as long as of administrative value.</p>	M	No	0Y	0Y	1
G008.002	<p>Forms Management</p> <p>Documentation of state agency efforts to control and standardize form creation and design and to monitor the use of forms. Includes history files, order requests, inventory files, and all other information supporting the administration of an agency forms management program. May include, but is not limited to:</p> <ul style="list-style-type: none"> • Correspondence; • Memoranda; • Reports; • Guidelines; • Articles; • Vendor information; • Sample forms; • Copies of internal policies and procedures; and • Other supporting documents related to forms design, management and control. <p>* AGY – Retain for life of form plus one (1) year.</p>	M	No	1Y	0Y	1