GOVERNMENT OF THE DISTRICT OF COLUMBIA

RECORDS RETENTION SCHEDULE

Office of Employee Appeals

Update: October 1, 2021

GOVERNMENT OF THE DISTRICT OF COLUMBIA

Office of Public Records

REQUEST FOR APPROVAL OF AGENCY RECORDS RETENTION SCHEDULE

1. Agency	Office of Employee Appeals	
2. Schedule No.	DCRS 21-0015	
3. Amendment/ Addendum No		
4. Contact Person		
5. Address		
6. Telephone No		
7. Action Requested		a. Approval of agency records retention schedule
		b. Approval of amendment/addendum to agency retention schedule
c. Remarks		

Signature of Agency Representative	Title	Date
[signature]	Executive Director	Sept. 14, 2021

Approvals

Bill Branch Signature of DC Archivist	[X] Approve	[ ] Disapprove	9/16/21 Date
Signature of Public Records Administrator	[ ] Approve	[ ] Disapprove	Date

GOVERNMENT OF THE DISTRICT OF COLUMBIA

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Introduction to Agency Retention Schedule

The Importance of Records

Records are the institutional memory of government. Every agency is responsible for creating and maintaining records that adequately document the organization, functions, policies, procedures, and major activities of the agency. An agency's records should reflect the evolution of agency policies and decisions, provide the information needed by successor officials to make intelligent decisions, and provide a lasting record of the unique contributions of the agency. Proper records must be kept to document the financial and legal commitments and interests of the government and of its citizens, and to permit oversight of an agency's activities.

Records Management

It is not only important that every agency create and maintain adequate documentation, but also that it provide for the proper disposition of its records by adopting a comprehensive records management program. Such a program establishes controls over records from the time of their creation to the time of their final disposition. It seeks to (a) provide for the timely and systematic removal of inactive records from an agency and the eventual destruction of those of a temporary nature after an appropriate length of time; and (b) identify those records of such historical or other importance that they should be preserved permanently in the District of Columbia Archives. A records management program is vital to the efficient and economical operation of government. Without it, offices would be drowning in records, at tremendous costs to the government in space, filing equipment, staff, and general efficiency of operations.

Records Schedule

The records schedule forms the heart of a good records management system. A schedule identifies those records of continuing value that are suitable for accessioning into the D.C. Archives and authorizes agencies to dispose of those records of temporary importance. A schedule is a detailed timetable that specifies the length of time records should be kept in active and inactive status prior to their final disposition. It prescribes how long a record should be maintained within an office before it may be destroyed, moved to low-cost storage in the D.C. Records Center, or transferred to the D.C. Archives to be preserved permanently.

There are two (2) types of records schedules: (1) an agency retention schedule; and (2) a general records schedule.

(1) Agency Retention Schedules – The attached schedule is an agency retention schedule. It is based on a survey of the specific records created, received, utilized and maintained in the various offices of your agency, and its disposition instructions are tailored to those records unique to your agency. It provides legal authority for the disposition of official records of your agency alone.

(2) General Records Schedule - In addition to agency records schedules, there are also general records schedules. These schedules provide disposition authority for records common to most or all agencies of government. They cover records relating to personnel, fiscal functions, accounting, budget, procurement, transportation, and other common or housekeeping functions. An agency may implement or utilize the disposition instructions of a general records schedule where applicable or may apply a retention period that differs from that in the general schedule by submitting a retention schedule for that particular record series. However, General Schedules do not apply to documents dated before January 1, 1921. If you have records in your office dated earlier than 1921, please contact the D.C. Archives for an appraisal of those records.

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The general records schedules that have been developed for the District of Columbia are embodied in D.C. General Records Schedules 1-18 and 20-24. The Office of Public Records is currently in the process of updating the DC General Schedule to reflect changes in the government, the implementation of new procedures, policies, and practices, as well technology over the past 30 to 40 years. Changes will be posted and agency records management officers will be notified.

Amending an Agency Records Retention Schedule

An agency records retention schedule is not a static document, it must be reviewed and revised on a regular basis. The organization of an agency, its functions, and programs are constantly changing, and the schedule must be continually updated to incorporate these changes. Amendments to agency schedules may be initiated either by the agency or by the Office of Public Records. Regulation 1 DCMR 1504.1(h) requires Agencies to review schedule annually to insure that it is up-to-date and provides for the disposition of all series of records not covered by the general records schedules.
In order to understand and apply the records retention schedule for your agency, it is important to define certain terms that are used in records management and archives.

What are Public Records?

Public records are defined by the District of Columbia law as "any document, book, photographic image, electronic data recording, electronic mail, paper, video recording, sound recording, microfilm, computer disk, or other material, regardless of physical form or characteristic, that documents a transaction or activity made, received, or retained pursuant to law or in connection with the transaction of public business by or with any officer or employee of the District." Records are made or received and utilized by an office as it conducts its business. They relate directly to the mission of an agency and document the functioning of an agency. Although a paper document is the most common form of a record, a record can be of any physical characteristic. Computer tapes and disks, sound and video recordings, photographs and motion picture film, microfilm, maps, and charts, may each constitute an official record. Records as defined above belong to the District of Columbia. In no sense are they the personal property of an individual. They may not be destroyed except under legal procedures established by the government. One of the major purposes of an approved agency records retention schedule is to provide authority for the legal disposition of official records.

What is Non-Record Material?

Not every document in a government office is an official record. The following types of material are usually considered non-record: duplicate copies of documents; pamphlets, periodicals, books, printed reports, and other materials maintained for reference purposes; reference copies of Mayor's Orders, Mayor's Memoranda, and the D.C. Register; reading files ("chron files"); copies of memoranda, correspondence, reports, and similar materials received from other agencies that require no action; drafts of reports and correspondence and related working papers that don't impact or are not considered essential to a final decision regarding policies, laws, and regulations, and that don't demonstrate the thought processes and reasoning behind making those decisions; blank forms, transmittals, and routing slips; and materials relating to fringe activities of an agency such as charitable fund drives.
Non-record materials are disposable on agency authority alone. If you are unsure as to the status of certain kinds of material, please call the Office of Public Records for assistance.

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What are Personal Papers?

Some officials and employees keep personal papers within their offices. These are documents of an unofficial, private nature that pertain to an individual's personal affairs and do not relate to official business. Such papers might include files accumulated by an official (or employee) before they assumed office, or documents relating to one's private concerns, such as outside business activities or memberships in professional organizations, or personal notes or diaries that are totally unrelated to public business.

It is important that such papers be kept apart from official records and that they are clearly labeled as private papers. Please take care to see that personal papers do not become intermingled and confused with official records.

Retention Schedule Basic Terms and Use:

Close Date	The date or timeframe from which no further information may be added to a record.
Cutoff Date	After records close, a date or timeframe is selected as the "cut off", designating when the record becomes inactive. This date starts the retention time clock and occurs at regular intervals. Please note, close and cut off may be the same date.
Destroy/Delete	Records may be destroyed or deleted in accordance with DC Code § 2-1701, and Agency policy. Care should be taken to ensure proper destruction of government records.
PHI	Personal Health Information defines the information covered under the HIPAA privacy rule. Federal protections apply to personal health information held by covered entities and gives patients an array of rights with respect to that information. At the same time, the privacy rule is balanced so that it permits the disclosure of personal health information needed for patient care and other important purposes.
PII	Personally Identifiable information (PII), or Sensitive Personal Information (SPI), as used in US privacy law, is information that can be used on its own or with other information to identify, contact, or locate a single person, or to identify an individual in context.
Remaining Retention in Records Center	Total retention period minus length of time records are maintained on-site. For permanent records, this is the remainder of the period that the records remain in the legal custody of the agency before transferring to the Archives.
Transfer of Records (Physical)	Upon completion of on-site retention, records may be transferred to the Records Center, the DC Archives or deleted. Records transferred to the Record Center remain in the legal custody of the Agency. FOIA requests for these records are sent to the Agency, and the Agency is responsible to respond and release information as appropriate.

Transfer of Records (Legal)	Upon completion of on-site retention, records may be transferred to the Records Center, the DC Archives or deleted. Records transferred to the DC Archives transfer legal custody to the Archives. FOIA requests for these records are the responsibility of the Archives.
Total Retention	The total time a record is to be retained in the legal custody of the District after cut off.
Years in Office	Length of time records are maintained on-site at the Agency after cut off.

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Organization

Office of Employee Appeals

Policy and Procedures

Two hardcopies or a single electronic copy accompany this submission

List Executive Directors

Sheila Barfield	Current
Warren Cruise	

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Citations Impacting Retention

Federal

2 CFR § 200.333 (Grants)

DC Legislation

DC Code § 2-1701
DC Code § 2-1706
DCMR § 1-1504.1(d)

Court Orders

None

Audits Impacting Retention

None

Record Schedule

The office of Employee Appeals was established in the District of Columbia in 1982 under SS 1-606.01. The OEA is composed of five members appointed by the Mayor of D.C. The members' primary job is to hear and decide labor-related appeals received from either a D.C. agency or qualifying local agency employee. The employee must have exhausted all agency-level appeals to be heard. Resolution may be through mediation or litigation.

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
1	Formal Communications (Executive Staff) Formal communications that impact the mission or execution of the mission and programs of the agency. Series includes, but is not limited to, correspondence with the Mayor, Deputy Mayors, City Administrator, City Council, intra-agency, and inter-agency directives. Records are organized chronologically. Restrictions: None Media: Paper/Electronic (Secure agency network) Permanent: Records close when the designated action is superseded or becomes obsolete; and cut off at the end of the corresponding Mayor's administration. Records are transferred within 30 days of cut off to the Record Center for retention for 4 years and then transferred to the DC Archives.	Permanent	None	4 Years

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
2	Public Relations Files (Communications) Text, audio or video recordings of formal speeches, announcements, and remarks to the press. Remarks made at formal ceremonies or during interviews by the agency executive staff and other high-ranking officials concerning agency programs. Restrictions: None Media: Paper /Electronic (Secure agency network)			
a	Formal Interviews: Permanent: Records close upon conclusion of the interview and cut off at the end of the corresponding Mayor's administration. Records are transferred to the DC Archives within 30 days of cut off.	Permanent	None	None
b	News Releases: May be textual records such as a formal press releases or non textual records, such as film and video or sound recordings. Restrictions: None. Media: Paper/ Electronic (Secure agency network) Permanent: Records close upon distribution of release and cut off at the end of the corresponding Mayor's administration. Records are transferred to the DC Archives within 30 days of cut off.	Permanent	None	None

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
3	Agency Policy and Procedures (Executive Staff) defining operational guidelines. Each Division within the Department arranges its policies in its own way. Restrictions: None Media: Paper and Electronic (Secure agency network) Permanent: Records close when the policy or procedure is superseded or becomes obsolete and cut off at the end of the calendar year. Retain records on site four years after cut off, then transfer to the D.C. Archives.	Permanent	4 Years	None
4	Schedule of official activities of agency executive staff Restrictions: None Media: Paper / Electronic (Secure agency network) Permanent: Records close at the end of the calendar year and cut off at the end of the corresponding Mayor's administration. Records are transferred within 30 days of cut off to the Record Center for retention and will be transferred to the DC Archives after 4 years.	Permanent	None	4 Years

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
5	Strategic Plans (Performance Management) Plans and supporting documentation utilized to set the strategic direction for the agency including, but not limited to studies, benchmarking of other jurisdictions, and statistical data supporting current and planned future state. These records are organized by subject and date. Restrictions: Restricted Media: Electronic (Secure agency network) Permanent: Records close when the plan is superseded or becomes obsolete; and cut off at the end of the corresponding Mayor's administration. Records are transferred within 30 days of cut off to the Record Center for retention and will be transferred to the DC Archives after 4 years.	Permanent	None	4 Years
6	Performance Reports (Performance Management) The Office of the Chief Operating Officer maintains statistical data regarding the population served, and types of services rendered. Statistics are both quantitative and qualitative in nature. This series does not include employee performance metrics. Records are arranged by topic and year. Restrictions: None Media: Paper / Electronic (Secure agency network/dc.gov)			
a	Published Permanent. Records close upon publication of the report and cut off at the end of the corresponding Mayor's administration. Records are transferred within 30 days of cut off to the Record Center for retention and will be transferred to the DC Archives after 4 years.	Permanent	None	4 Years

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
b	Unpublished Appraisal: Records close upon completion of the final version of the report and cut off at the end of the corresponding Mayor's administration. Records are transferred within 30 days of cut off to the DC Archivist for Appraisal.	Appraisal required by DC Archivist		
7	Project Subject Files (Executive Staff) This record documents program-related projects and initiatives. Record consists of all documents and data relating to a specific project from inception to completion. Included are correspondence, memoranda, questionnaires, studies and reports, and related records. Excludes records that impact the mission or vision of the Director's Office which are to be retained permanently. Records are organized by subject. Restrictions: None Media: Paper / Electronic (Secure agency network) Appraisal: Records close upon completion or conclusion of the project and cut off at the end of the corresponding Mayor's administration. Records are transferred within 30 days of cut off to the DC Archivist for Appraisal.	Appraisal required by DC Archivist		

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
8	Organization Files (Executive Staff) Organizational Charts and reorganization studies that define descriptions of the arrangement and administrative structure of the functional units within the agency. Organized by date. Media: Paper / Electronic (Secure agency network) Permanent: Records close when the version is superseded or becomes obsolete; and cut off at the end of the corresponding Mayor's administration. Records are transferred within 30 days of cut off to the Record Center for retention and will be transferred to the DC Archives after 4 years.	Permanent	None	4 Years
9	Publications (Communication) Publications on various topics of interest or concern that provide insight and awareness. Organized by topic and year. Restrictions: None Media: Paper / Electronic (Secure agency network, dc.gov)			
a	Printed Materials Permanent: Records close when published and cut off at the end of the corresponding Mayor's administration. Records are transferred to the DC Archives within 30 days of cut off.	Permanent	None	None
b	Agency Websites Media: Electronic (dc.gov) Permanent: Records close when published and cut off last day of the quarter (March, June, September, and December). Records are transferred to the DC Archives within 30 days of cut off.	Permanent	1 Quarter	None

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
c	Social Media Posts Media: Electronic (Stored on Twitter, LinkedIn, and Facebook) Permanent: Records close when published and cut off last day of the quarter (March, June, September, and December). Records are transferred to the DC Archives within 30 days of cut off.	Permanent	1 Quarter	None

Board Members and Judges

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
10	Case Files: This record documents the review and proceeding associated with a District employee's appeal of a Human Resource decision by an agency of the District. These records may include, petition for appeal, employee contact information, a statement as to whether the employee requests an evidentiary hearing or oral argument, a concise statement of the facts giving rise to the appeal, an explanation as to why the employee believes the agency's action was unwarranted, a statement of the specific relief the employee is requesting and decisions. Records are organized by a category code (2401-Reduction in Force, 1601-Adverse Action, J-Jurisdiction) followed by a sequential number representing the number of the case in a given fiscal year, and then the fiscal year. Restrictions: PII Media: Electronic (Shared Drive) Permanent: Records close upon final determination through litigation or mediation or exhaustion of all appeals, whichever is later. Records cut of at the end of the fiscal year. Upon cut-off transfer the records to the DC Archives.	Permanent	Permanent Courtesy Copy in Agency	None

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
11	Board Meeting Files – This record documents board meeting files. The records include but are not limited to agendas, minutes, and transcripts. Arranged chronologically by Board meeting date. Restriction: None Media: Electronic (Agency Drive) Permanent: Records close upon acceptance of the minutes and cut off at the end of the current Mayoral administration. Transfer to the DC Archives within 30 days of cut-off.	Permanent	None	None

Office of the General Counsel Files

	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
12	Freedom of Information Act Requests (General Counsel). This record documents requests from the public for document(s) to be released under the Freedom of Information Act (FOIA). Records include the request, a copy of the reply, and all related supporting files. Records are organized by response date. Restriction: None Media: Paper			
a	Approved Requests Temporary: Records close upon response to the requester and cut off at the end of the calendar year. Retain records for 2 years after cut off and then destroy.	Temporary 2 Years	2 Years	None
b	Denied Requests Temporary: Records close upon response to the requester and cut off at the end of the calendar year. Retain records for 5 years after cut off and then destroy.	Temporary 5 Years	5 Years	None
13	Freedom of Information Act Appeals (General Counsel) This record documents requests denied by an agency, commission, or formal office in the District of Columbia to release documents under the Freedom of Information Act. Records include the request, a copy of the denial, and all related supporting files. Records are organized by response date. Restriction: None Media: Paper			

	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
a	Denied requests appealed to a District official Temporary: Records close upon decision by District official and cut off at the end of the calendar year. Responses are entered into FOIA Express, and any records held at the originating agency are retained for 4 years after cut off and then destroyed.	Temporary 4 Years	4 Years	None
b	Denied requests appealed to the DC Court of Appeals Temporary: Records close upon decision by the court and cut off at the end of the calendar year. Responses are entered into FOIA Express, and any records held at the originating agency are retained for 3 years after cut off and then destroyed.	Temporary 3 Years	3 Years	None

Administrative Records The records covered in this section relate to routine internal administrative and housekeeping activities are generally facilitative or informational. *They are not basic program records and are not part of official program files.* They are often extra copies of documents whose record copies must be scheduled by submitting a request for records disposition authority.

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
14	Asset Inventory (Facilities Manager) Inventory of physical assets (non-transitory) held by the agency, including furniture, technology equipment, or other physical assets. Inventories are organized by Control ID and Asset Name, and record both location and the last inventory date. Restrictions: None Media: Paper Temporary: Records close and cut off when superseded. Retain records for 2 years after cut off, and then destroy.	Temporary 2 Years	2 Years	None
15	Records Disposition Files (Records Manager) Basic documentation of records description and disposition programs, including but not limited to: • Retention Schedules • SF135-Records Transmittal and Receipt • Requests for Records Disposition Authority • Notice of intent to destroy • Confirmation of Destruction of Records Organized by date and type of file. Restrictions: None Media: Paper/Electronic (Agency Secure Network) Permanent: Records close and cut off at the end of the calendar year. Retain in Agency permanently.	Permanent	Permanent	None

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
16	Working Papers Project background records, analyses, notes, drafts, and interim reports Restrictions: None Media: Paper and Electronic (Agency Secure Network)			
a	With Final Action Appraisal: Records close upon final action and cut off at the end of the calendar year. Records are transferred within 30 days of cut off to the Record Center for Appraisal	Appraisal required by DC Archivist		
b	With no Final Action Temporary: Records close if no action is taken in three years from final report and cut off at the end of the calendar year. Destroy upon cut off, or when the record is no longer needed for administrative or reference purposes.	Temporary 3 Years	3 Years	None
17	Administrative Files Records accumulated by individual offices that relate to the internal administration or housekeeping activities of the office rather than the functions for which the office exists. Restrictions: None Media: Paper and Electronic (Agency Secure Network) Temporary: Records close and cut off at end of the calendar year. Destroy when no longer needed for administrative or reference purposes.	Temporary Cutoff at end of Calendar Year	None	None
18	Schedules of Daily Activities (Non-Senior Officials) Calendars, appointment books, schedules, logs, diaries, and other records documenting meetings, appointments, telephone calls, trips, visits, and other activities of D.C. employees. Restrictions: None Media: Paper and Electronic (Agency Secure Network)	Temporary Destroy when no longer needed	Until no longer needed	None

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
	Temporary: Records close and cut off at the end of the calendar year. Destroy when no longer needed for administrative or reference purposes.			
19	Mailing and Invitation Lists: This record identifies individuals and organizations that are to receive copies of newsletters, reports, invitations to events, and other issuances. Restrictions: None Media: Paper and Electronic (Agency Secure Network) Temporary: Records close and cut off upon conclusion of the event, meeting, conference, etc. Destroy records when no longer needed for administrative or reference purposes.	Temporary Destroy when obsolete or superseded	Until no longer needed	None
20	Suspense Files (Files noting actions to be taken) Papers arranged in chronological order as a reminder that an action is required on a given date or that a reply should be traced on a given date. Restrictions: None Media: Paper and Electronic (Agency Secure Network) Temporary: Records close and cut off upon completion of review or action. Destroy records when no longer needed for administrative or reference purposes.	Temporary Destroy after action is taken	Until no longer needed	None
21	Transitory Files Papers of short-term interest which have no documentary or evidential value and normally need not be kept more than 90 days. Examples: • Letters of Transmittal • Quasi-Official notices • Memos and other papers that do not serve as basis for official action • Holiday notices • Charity notices	Temporary Destroy when 3 months old or when no longer needed, whichever is	3 Months	None

Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
	• Bond Campaigns Restrictions: None Media: Paper and Electronic (Agency Secure Network) Temporary: Records close upon completion of review or action and cut off at end of the quarter. Retain record for 3 months after cut off and then destroy when no longer needed for administrative, audit or reference purposes.	sooner		
22	Contract Administration-Agency Copies (Agency Procurement Staff) Files containing documentation pertaining to the acquisition of procuring physical goods, services, products, and personal property. Procurement files consists of contracts, requisitions, purchase orders work orders, invoices. Organized by fiscal year. May be in multiple formats including paper and electronic. (Note: Office of Contract Procurement (OCP) has original records; the Procurement Automated Systems (PASS) is OCP's primary system of record for the District's procurement. This agency retains custody until the time the records meet its prescribed retention period. Retain copies for 6 years after final payment and until all audit requirements have been fulfilled, then destroy paper/electronic copies. Restrictions: None Media: Paper/Electronic (Agency Secure Network, PASS)~~Contract Administration-Agency Copies (Agency Procurement Staff) Files containing documentation pertaining to the acquisition of procuring physical goods, services, products, and personal property. Procurement files consists of contracts, requisitions, purchase orders work orders, invoices. Organized by Calendar year.~~ ~~Restrictions: None~~			

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Series #	Records Series Description	Total Retention	Years in Office	Remaining Retention in Records Center
	~~Media: Paper/Electronic (Agency Secure Network, PASS)~~			
a	Under $100,000 Temporary: Records close when final payment is made or received and cut off at the end of the calendar year. The record is retained for 3 years after cutoff, and then is prepared for confidential destruction.	Temporary 3 Years	3 Years	None
b	$100,000 + Temporary: Records close when final payment is made or received and cut off at the end of the calendar year. The record is retained for 6 years after cutoff, and then is prepared for confidential destruction.	Temporary 6 Years	6 Years	None

Non-Records

Non-record materials are disposable upon agency authority. Please direct questions to the Office of Public Records for assistance.

Description
Duplicate copies of documents
Printed Reports from Computer Programs that can be recreated on-demand
Reference or Convenience Copies of official documents (i.e.: copies of Mayor's orders, or correspondence)
Working papers that don't impact or are not considered essential to a final decision regarding policies, laws, and regulations
Library or other reference materials or records maintained solely for convenience or reference
Blank forms
Materials relating to fringe activities of an agency such as charitable fund drives.