

MIDWEST AREA  
STANDARD OPERATING PROCEDURES  
MANUAL

**FILE RETENTION &  
DISPOSITION**

Created by  
Program Administrative Support Task Group

August 2008

**FILE RETENTION AND DISPOSITION  
(Original Documents)**

115s – Current plus three years (provided they've been published).

ANNUAL REPORTS AND PLANS – Current plus 5 years (in case of 5-year review).

BUDGET – Current plus 5 years (in case of 5-year review).

CORRESPONDENCE – Current plus 5 years.

INCOMING AGREEMENTS – Current plus five years (funded only).

PATENT INFORMATION – Current plus 5 years.

PCMS DOCUMENTATION – Purchase Under \$3000 (Supplies); \$2500 (Services)  
\$2000 (Construction) – Current plus three years.

PURCHASE ORDERS – Current plus 2 years.

RPES – Current electronic case write-up.

STATUS OF FUNDS – Current plus 2 years.

T&As – Current plus 6 years. (This includes all supporting documentation;  
e.g., leave slips).

TRAINING FORMS – Current plus 3 years.

TRAVEL DOCUMENTATION – Current plus 6 years and 3 months.

[P&P #251.8M, Records Management \(Manual\)](#)

[P&P #251.8, Records Management](#)

[File Management Book \(June 1985\)](#)