

Schedule Applicable to: ALL LOCAL GOVERNMENT AGENCIES

Schedule Title: PERSONNEL - BENEFITS

DISPOSITION AUTHORITY GS50-04D

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	BENEFITS STUDIES AND SURVEYS	OFM	Destroy when obsolete or superseded	Destroy when obsolete or superseded	GS50-01-32	
2	EMPLOYEE BENEFIT CONTRACTS / POLICIES / PLANS Includes insurance, deferred compensation, health care, etc. ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Until superseded or coverage lapses plus 6 years	Destroy when obsolete or superseded	GS50-04D-02	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
3	EMPLOYEE BENEFIT PARTICIPATION / ENROLLMENT AGREEMENTS AND WITHDRAWALS ESSENTIAL RECORD - Needs security backup - See remarks.	OPR	Termination or withdrawal plus 6 years	Destroy when obsolete or superseded	GS50-04D-03	This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the location of other copies inside and outside the agency.
4	LISTING OF PARTICIPANTS COVERED BY AGENCY HEALTH INSURANCE PROVIDERS – EMPLOYEE BENEFITS Report submitted monthly to the agency by the provider.	OFM	3 years	Destroy when obsolete or superseded	GS50-04D-06	
5	MONTHLY STATEMENT OF EMPLOYEE BENEFITS PAID	OPR	6 years	Destroy when obsolete or superseded	GS50-04D-04	
6	UNEMPLOYMENT INSURANCE CLAIMS OF INDIVIDUAL EMPLOYEES	OPR	6 years	Destroy when obsolete or superseded	GS50-04D-05	

Schedule Title: PERSONNEL - EMPLOYEE RELATIONS

DISPOSITION AUTHORITY GS50-04E

SERIES NO.	RECORDS SERIES TITLE AND DESCRIPTION OF SERIES	OPR or OFM	OFFICE OR DIVISION LOCATION AND MINIMUM RETENTION PERIOD		DISPOSITION AUTHORITY NUMBER (DAN)	SPECIAL AND/OR DISPOSITION INSTRUCTIONS
			PRIMARY RECORD COPY	SECONDARY RECORD COPY		
1	COLLECTIVE BARGAINING AGREEMENTS ESSENTIAL RECORD - Needs security backup -- See remarks.	OPR	Termination plus 6 years - Potential archival value - See remarks	Destroy when obsolete or superseded	GS50-01-11	Please contact your Regional Archivist before disposing of this record. Records from this series may be selected to be transferred to and preserved at a Regional Archives branch. This record should be protected from damage or loss by off-site storage of a security copy, or by keeping a list that identifies the locations of other copies inside or outside the agency.