

TRAINING (TRN)

This category deals with policy, plans, procedures, operations, and other material related to training of Agency personnel.

Instructions given are for record copies. All other copies are treated as informational unless separately scheduled. Informational copies cannot be retained beyond the retention period for the recordkeeping copies.

1. *TRAINING*

General material pertaining to Agency training too broad to be filed in subjects below.

Disposition: Temporary

Recordkeeping Copies: Destroy when 2 years old.

Disposal Authority: [NCI-310-77-2, item 401a]

2. *POLICY*

Policy and guidelines covering all subjects included under this primary subject. If needed, subdivide by type or subject of policy and cross-reference to appropriate subject category.

Disposition: Temporary

Recordkeeping Copies: Retire to Federal Records Center (FRC) when 10 years old. Destroy when 20 years old.

Disposal Authority: [NCI-310-77-2, item 403a]

EXCEPT: Published instructions or directives which are filed in binders according to established Agency custom.

3. *REPORTS AND STATISTICS*

Reports covering all subjects included under this primary subject. Includes annual report to Congress. Case file by type of report as necessary.

- a. Record copy of substantive reports, such as annual summaries and comprehensive nonrecurring reports. Case file special or one-time reports as needed.

Disposition: Temporary

Recordkeeping Copies: Retire to FRC when 10 years old. Destroy when 20 years old.

Disposal Authority: [NCI-310-77-2, item 404a]

- b. Agency copy of above reports.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposal Authority: [NCI-310-77-2, item 405a]

- c. All other reports.

Disposition: Temporary

Recordkeeping Copies: Destroy when 2 years old.

Disposal Authority: [NCI-310-77-2, item 406a]

4. *ACTIVITY REPORTS*

Summaries of specific action or work performed by program or administrative personnel.

Disposition: Temporary

Recordkeeping Copies: Destroy when 2 years old.

Disposal Authority: [GRS 23, Item 1]

5. *COMMITTEES, MEETINGS*

- a. Committees and meetings relating to TRN program functions not having long-term significance. Subdivide committees and meetings, if necessary, and show name and date span on folder.

Disposition: Temporary

Recordkeeping Copies: See GRS 16, items 8a – 8c.

- b. Case file record copy of minutes and related material, including agendas, of substantive or significant committees or meetings concerned with broad aspects of TRN, such as advisory organizations, and interagency committees. Includes committee to carry out responsibility of assignments.

Disposition: Temporary

Recordkeeping Copies: Retire to FRC when 10 years old. Destroy when 20 years old.

Disposal Authority: [NCI-310-77-2, item 409a]

6. *ARRANGEMENTS*

Includes such material as meeting arrangements, invitations, extra copies of agendas, accommodations, authority to attend, work papers, acceptances, and regrets.

Disposition: Temporary

Recordkeeping Copies: Destroy when 1 year old.

Disposal Authority: [NCI-310-77-2, item 410a]

7. *PLANS AND ESTIMATES*

Material relating to Agency or program long and short-range group training plans and estimates. Subdivide by specific type of plan if necessary.

Disposition: Temporary

Recordkeeping Copies: Destroy 3 years after plans are superseded or obsolete.

Disposal Authority: [NCI-310-77-2, item 411a]

EXCEPT: Individual employee training plan. See Training 10.

8. TRAINING PROGRAMS

- a. General material including information requests relating to training courses or programs not covered by tertiary subjects below.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposal Authority: [NCI-310-77-2, item 412a]

[NOTE: Specific training courses/programs should be case filed by course title under the appropriate tertiary below; and, if necessary, subdivide by type of training; i.e., technical, managerial, supervisory, or clerical.]

- b. In-House Training

- (1) Correspondence, memoranda, agreements, authorizations, reports, requirement reviews, plans, and objectives relating to the establishment and operation of training courses and conferences.

Disposition: Temporary.

Recordkeeping Copies: Destroy when 5 years old or 5 years after completion of a specific training program.

Disposal Authority: [GRS 1, Item 29a(1)]

- (2) Background and working files.

Disposition: Temporary.

Recordkeeping Copies: Destroy when 3 years old.

Disposal Authority: [GRS 1, Item 29a(2)]

(3) Master file of specific in-house training program or courses developed by Agency offices including material and description of courses and teaching aids used. Subdivide by type or training.

Disposition: Temporary

Recordkeeping Copies: Retire to FRC when 10 years old. Destroy when 20 years old.

Disposal Authority: [NCI-310-77-2, item 414a]

c. Departmental Training

General material relating to course or program sponsored by the Department.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

d. Case file material related to specific courses or programs sponsored by the Department.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

e. Interagency Training

General material relating to courses or programs sponsored by other agencies within the Department.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

- f. Case file material related to specific courses or programs sponsored by the Department.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

- g. Federal Agency Training

General material relating to courses and programs sponsored by other Federal agencies.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

- h. Case files of material related to specific courses or programs sponsored by other Federal agencies.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

- i. State Training

General material relating to courses and programs sponsored by States.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

- j. Case files of specific State-sponsored programs or courses.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

k. Training Institutions

General material relating to courses and programs sponsored by training institutions such as universities, colleges, and private industry.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

l. Case files of specific programs or courses sponsored by private institutions.

Disposition: Temporary

Recordkeeping Copies: Destroy when 5 years old or when superseded or obsolete, whichever is sooner.

Disposal Authority: [GRS 1, Item 29b]

9. TRAINING FACILITIES

Material relating to available training facilities including equipment used for training purposes. **EXCEPT:** Purchase orders, requisitions, and the like used to acquire facilities. See Property.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposal Authority: [NCI-310-77-2, item 425a]

10. TRAINING ADMINISTRATION

- a. Case files of individual employee training. Includes copies of individual training plans course records, requests, authorizations, and completion forms. **EXCEPT:** Official Agency files maintained in Official Personnel Folder.

Disposition: Temporary

Recordkeeping Copies: Destroy when 3 years old.

Disposal Authority: [NCI-310-77-2, item 402a]

- b. Employee training history listing.

Disposition: Temporary

Recordkeeping Copies: Destroy 2 years after employee leaves program or division.

Disposal Authority: [NCI-310-77-2, item 426a]