

RECORDS RETENTION AND DISPOSITION SCHEDULE



DIVISION OF ADMINISTRATIVE SERVICES PURCHASING UNIT

**DIVISION OF COURT OPERATIONS
OFFICE OF RECORDS MANAGEMENT**

February 2000

**DIVISION OF ADMINISTRATIVE
SERVICES
PURCHASING UNIT**

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DIVISION OF ADMINISTRATIVE SERVICES

PURCHASING UNIT

<u>R.S. #</u>	<u>RECORD SERIES</u>	<u>RETENTION</u>
00000.	BID ANALYSES Reviews of bids made in response to an advertisement published in the <i>Contract Reporter</i> . a) Contract Related b) Non-Contract Related	a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy. b) Retain for three years after final payment, then destroy.
00000.	BID PACKAGES (also known as BID PROPOSALS) Packages containing general specifications, standard clauses and forms, specifications for bids and cover memos. a) Contract Related b) Non-Contract Related	a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy. b) Retain for three years after final payment, then destroy.

<u>R.S. #</u>	<u>RECORD SERIES</u>	<u>RETENTION</u>
00000.	<p>BID RECOMMENDATIONS</p> <p>Recommendations made by Purchasing Unit staff to purchase goods and services from a particular vendor after review of bid packages.</p> <p>a) Contract Related</p> <p>b) Non-Contract Related</p>	<p>a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy.</p> <p>b) Retain for three years after final payment, then destroy.</p>
00000.	<p>BOILER PLATE FILE (also known as BID SPECIFICATION FILE)</p> <p>File containing copies of bid specifications.</p>	Retain until superseded, then destroy.
00000.	<p>CONTRACTS</p> <p>Duplicate copies of agreements made between vendors and the Unified Court System for the purchase of goods and services.</p>	Retain until no longer needed, then destroy.
00000.	<p>INVOICES</p> <p>Duplicate copies of documents received from vendors itemizing list of goods shipped and price per item.</p>	Retain until no longer needed, then destroy.

<u>R.S. #</u>	<u>RECORD SERIES</u>	<u>RETENTION</u>
00000.	<p>NEW YORK STATE CONTRACT REPORTER ADVERTISEMENT FILE</p> <p>File containing <i>New York State Contract Reporter</i> insertion forms, advertisements, and memoranda related to purchases.</p> <p>a) Contract Related</p> <p>b) Non-Contract Related</p>	<p>a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy.</p> <p>b) Retain for three years after final payment, then destroy.</p>
00000.	<p>NEW YORK STATE CONTRACT REPORTER PUBLICATIONS</p> <p>Copies of published <i>New York State Contract Reporters</i> containing information related to the purchasing process.</p>	Retain for five years, then destroy.
00000.	<p>PACKING SLIPS</p> <p>Duplicate copies of documents received with goods at time of delivery.</p>	Retain until no longer needed, then destroy.

<u>R.S. #</u>	<u>RECORD SERIES</u>	<u>RETENTION</u>
00000.	<p>PURCHASE AUTHORIZATIONS</p> <p>Memoranda received from review parties authorizing the purchase of goods and services.</p> <p style="padding-left: 40px;">a) Contract Related</p> <p style="padding-left: 40px;">b) Non-Contract Related</p>	<p>a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy.</p> <p>b) Retain for three years after final payment, then destroy.</p>
00000.	<p>PURCHASE LOG</p> <p>Log of identification numbers assigned to PURCHASE FOLDERS. Log also tracks purchase requests submitted by the Office of Court Administration and “wide spectrum” purchases made for the courts.</p> <p style="padding-left: 40px;">a) Contract Related</p> <p style="padding-left: 40px;">b) Non-Contract Related</p>	<p>a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy.</p> <p>b) Retain for three years after final payment, then destroy.</p>

<u>R.S. #</u>	<u>RECORD SERIES</u>	<u>RETENTION</u>
00000.	<p>PURCHASE ORDER DATA SET FILE (also known as “PLITE” FILE)</p> <p>Database reflecting the creation and maintenance of PURCHASE ORDERS generated by the Purchasing Unit.</p> <p>a) Contract Related</p> <p>b) Non-Contract Related</p>	<p>a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy.</p> <p>b) Retain for three years after final payment, then destroy.</p>
00000.	<p>PURCHASE ORDERS</p> <p>Duplicate copies of purchasing documents submitted by the Purchasing Unit to vendors to obtain goods and services.</p>	<p>Retain until no longer needed, then destroy.</p>
00000.	<p>PURCHASE REQUESTS</p> <p>Document submitted to the Purchasing Unit by Office of Court Administration Divisions/Offices to request the purchase of goods and services.</p> <p>a) Contract Related</p> <p>b) Non-Contract Related</p>	<p>a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy.</p> <p>b) Retain for three years after final payment, then destroy.</p>

<u>R.S. #</u>	<u>RECORD SERIES</u>	<u>RETENTION</u>
00000.	<p>RFB/RFP FOLDERS</p> <p>Folders containing documents reflecting the completed bid process. Folders may also contain BID PACKAGES, BID ANALYSIS, recommendation(s) and copies of contract(s).</p> <p>a) Contract Related</p> <p>b) Non-Contract Related</p>	<p>a) Retain for six years after expiration of the contract or final payment, whichever is later, then destroy.</p> <p>b) Retain for three years after final payment, then destroy.</p>
00000.	<p>VOUCHERS</p> <p>Duplicate copies of records used to document the disbursement of funds. Includes voucher forms and supporting documentation.</p>	<p>Retain until no longer needed, then destroy.</p>

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