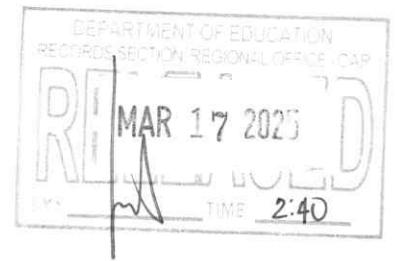




Republic of the Philippines
Department of Education
CORDILLERA ADMINISTRATIVE REGION



13 March 2025

REGIONAL MEMORANDUM

NO. 201-2025

TRAINING OF TRAINERS (TOT) ON THE UTILIZATION OF DOCUMENT TRACKING SYSTEM AND ELECTRONIC RECORDS MANAGEMENT CUM BENCHMARKING

To: Assistant Regional Director
RO Functional Division Chiefs
Schools Division Superintendents
All others concerned

1. Pursuant to Republic Act No. 9470, titled "National Archives of the Philippines Act of 2007," and Republic Act No. 11032, titled "Ease of Doing Business and Efficient Government Service Delivery Act of 2018," government offices are mandated to implement standardized electronic records management practices to ensure transparency, efficiency, and compliance with national policies.
2. In this connection, this Office, through the Administrative Services Division (ASD), shall conduct the **Training of Trainers (TOT) on the Utilization of Document Tracking System (DTS) and Electronic Records Management (ERM) cum Benchmarking on April 1-4, 2025** in Manila, at a specific venue to be announced later.
3. The activity aims to enhance records management through skills development, digital solutions in compliance with national policies. Specifically, participants shall:
 - a. describe national policies on physical and electronic records management and classify records based on regulatory guidelines;
 - b. demonstrate the use of document tracking systems with disaster preparedness and utilize ICT solutions for records management; and
 - c. receive orientation on digital records management practices, archival processes, and improve strategies based on best practices and cascade learnings.
4. Relative to this, participants identified in Enclosure 1 shall bring their laptops and accomplish the pre-training activities:
 - a. Identify the records applicable per FD/SDO specified under column 1 (Records Series Title and Description) of the NAP Form 1 "Records Inventory and Appraisal Report" attach as Enclosure 2 and fill out column 2 (Period Covered).
 - b. ITOs to integrate in the DTS the necessary entries to be used in the workshop.
5. Expenses for the board and lodging shall be borne by the Regional Office. The first meal shall be dinner on April 1, 2025, and the last meal is PM snacks of April 4, 2025. Travel and other related expenses shall be charged against local funds subject to existing accounting and auditing rules and regulations.
6. Should there be queries and/or clarifications, please contact Maksim A. Botilas, CAO-ASD through email address at car@deped.gov.ph.
7. For information and guidance of all concerned.


ESTELA P. LEON-CARIÑO EdD, CESO III
Director IV/ Regional Director

ASD/RS/dpe



Address: DepEd-CAR Complex, Wangal, La Trinidad, Benguet, 2601

Telephone No: (074) 422 - 1318

Email Address: car@deped.gov.ph
DepEd Tayo Cordillera

 <https://depedcar.ph>



List of Participants

Particulars	NO.
ORD	3
▪ RD ESTELA P. LEON-CARIÑO EdD, CESO III /ARD RONALD B. CASTILLO	
▪ Jumar B. Yago-an	
▪ Clinton P. Bugtong	
ASD	4
▪ Maksim A. Botilas/ Cornelia D. Adaci-Dulnuan	
▪ Daisy P. Eswat	
▪ Jayb B. Ngateg	
▪ Driver-Secretariat	
Functional Divisions (RMIC Member or representative)	
ASD	1
▪ Lilia A. Banawe	
CLMD	1
▪ Elizabeth C. Kial	
ESSD	1
▪ Georgina C. Ducyaso	
Finance	1
▪ Laarni J. Benjok	
FTAD	1
▪ Edgar H. Madlaing	
HRDD	2
▪ Rosita C. Agnasi	
▪ Laureen B. Likigan	
ORD	1
▪ Atty. Vanessa B. Flora	
PPRD	1
▪ Ethielyn E. Taqued	
QAD	1
▪ Jose Lorenzo J. Cobarrubias	
Abra	2
▪ Wilma Pacapac	
▪ Marlou Borja	
Apayao	2
▪ Joselito Tabangcura	
▪ Iyalee Manaysay	
Baguio City	2
▪ Arian Bangse-il	
▪ Harris G. Dizon Jr.	
Benguet	2
▪ Melvin Alfredo	
▪ Eric S. Wanson	
Ifugao	2
▪ Richard L. Butale	
▪ Gertrudes Alindayo	
Kalinga	2
▪ Christopher D. Libunao	
▪ Michelle E. Alagoy	
Mt. Province	2
▪ Brentford Ayochock	
▪ Loida Elaine G. Tibong	
Tabuk City	2
▪ Lovelyn L. Mukay	
▪ Allan S. Dumalsin	
Total	33

Training of Trainers (TOT) on the Utilization of Document Tracking System and Electronic Records Management cum Benchmarking at the NAP Office for Regional and Schools Division Office Records Handlers and Information Technology Officers

April 1-4, 2025

TIME	TOPIC /ACTIVITY	IN-CHARGE
Day 0 4:00PM-5:00PM	Arrival /billeting/Registration	Participants
5:00-6:00	Dinner	
Day 1		
7:30- 8:00 AM	Registration	
8:00-9:00 AM-	Preliminaries (AVP)	Participants
	Opening Remarks and Statement of Purpose	CORNELIA D. ADACI-DULNUAN Supervising Administrative Officer
	Message	RONALD B. CASTILLO CESO V Director III/Assistant Regional Director ESTELA P. LEON-CARIÑO EdD, CESO III Director IV/Regional Director
9:00 AM- 12:00AM	NAP General Circular No. 1 “Rules and Regulations Governing the Management of Public Records and Archives Administration”	Resource Speaker
	With health break	
12:00NN- 1:00PM	Lunch break	
1:00-3:00PM	Introduction to Disaster Preparedness (identification of vital, important, useful records)	Resource Speaker
3:00-3:15	Health break	
3:15-5:00PM	Workshop on the updating of the classification of records in the DTS based on NAP Circular No. 1 and MC No. 3	Participants/Resource Speaker
5:00 – 6:00	Dinner	
Day 2		
7:30 AM- 8:00 AM	Registration	
8:00 AM- 8:10 AM	Preliminaries (AVP)	
8:10 AM – 12:00 NN	Implementing Electronic Records Management (ERM) Policy (MC No. 2104-01)	Resource Speaker
	With health break	
12:00 – 1:00 PM	Lunch break	

TIME	TOPIC /ACTIVITY	IN-CHARGE
1:01 PM – 5:00PM	Immersion Activity at the National Archives of the Philippines (NAP) Office	Participants/ NAP Office
5:00 – 6:00	Dinner	
Day 3		
7:50 AM-8:00 AM	Registration	
8:00 AM - 12:00 NN	Workshop on the utilization guidelines of the DTS aligning with national regulations and improved efficiency in document tracking and security	Participants/Resource Speaker
	With Health break	
12:00 – 1:00 PM	Lunch break	
1:01 PM – 3:00PM	Wrap up and Preparation of the following: 1. Generic powerpoint presentation to be used during orientations 2.WAP and Implementation Plan 3. Closing program	All participants MAKSIM A. BOTILAS PhD Chief Administrative Officer
3:00-3:15	Health break	
	Departure	

NATIONAL ARCHIVES OF THE PHILIPPINES

Pambansang Sinupan ng Pilipinas

AGENCY
Department of Education - Cordillera
Administrative Region

ORGANIZATIONAL UNIT

TELEPHONE NO

ADDRESS

PERSON-IN-CHARGE OF FILES:

DATE PREPARED:

RECORDS INVENTORY AND APPRAISAL

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
DEPED- GRDS											
"ADMINISTRATIVE AND MANAGEMENT RECORDS"											
1. ACKNOWLEDGEMENT LETTER / RECEIPT								2 year		2	
2. ATHLETIC/SPORT PROFILES: Athletes profile Letters/endorsement Results Souvenir programs								1 year		1	
3. AUTHORITIES TO TRAVEL: Employees Officials Teachers/Principal/Asst. Principal Division Superintendents								2 years		2	
4. AWARDS AND COMMENDATIONS								PERMANENT			
5. BOARD/COUNCIL FILES: Memoranda Original Letters Reports Resolutions								PERMANENT			
6. CALAMITY RECORDS								2 years		2	
7. CERTIFICATE OF APPEARANCE								1 year		1	
8. CERTIFICATION: Certifications, authentication and verification (CAV) Certificate of graduation Diplomas Student report cards (Form 137) Special orders Enrollment								1 year		1	
9. CHARTS: Organized/functional Process flow								PERMANENT			
10. CLEARANCE: Student/teachers/employees /Tuition fees								1 year		1	
11. CREATION OF DIVISION AND DISTRICT OFFICE RECORDS:								PERMANENT			

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
12. COMMITTEE FILES: Investigating Task force								PERMANENT			
13. COMMUNICATIONS AND CORRESPONDENCE: Routine Non-routine								2 years		2	After acted upon
14. DIRECTIVE/ISSUANCES: Issued by the head of agency documenting policies, procedures, standard, rules, regulations and programs of the agency.								PERMANENT			
Issued by the head of agency reflecting routinary information								2 years		2	After superseded
15. DIRECTORIES OF PERSONNEL/SCHOOL OFFICIALS: Advisories Bulletins Circulars								2 years			After suspended
16. INQUIRIES-QUERIES: Non-routine Routine								2 years		2	
17. LISTS: Monuments/shrines (national) Officials (local/national)								2 years		2	
18. MANUALS:								PERMANENT			
19. MEETING FILES (Execom/Mancom): Committee reports Minutes of meeting Policies Resolution Other related documents								PERMANENT			
20. MESSAGES								PERMANENT			
21. PROGRAMS/PROJECTS: (paper including background material, studies, analyses, notes, rough drafts, interim management programs/projects)								PERMANENT			
22. PUBLICATIONS (created by DepEd) Advertisement Advisories Books								permanent			

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
Financial											
Cash flow								5 years		5	
Statement of income and expenses											
Statement of government equities											
Lists of due and demandable accounts payable (LDDAP)								3 years		3	
Liquidations								5 years	5	10	
53. TAXES:											
Advalorem/duty								3 years	3	6	
Exemptions								3 years	3	6	
Expanded value added tax								3 years	3	6	
Income								3 years	3	6	
Withholding tax certificates								4 years		4	
54. VOUCHER, INCLUDING BILLS INVOICES AND OTHER SUPPORTING DOCUMENTS								5 years	5	10	Provided post-audited, finally settled and not involved in any case
Disbursements											
Journals											
Liquidations											
Petty cash											
Reimbursement expense receipts											
Travelling expenses											
"ACCOUNTING RECORDS"											
55. AUTHORITIES FOR ALLOWANCES								2 years		2	After terminated
Clothing											
Cost of Living Allowances (COLA)											
Hardship											
Representation and Transportation Allowances (RATA)											
56. BOOKS OF FINAL ENTRIES:								PERMANENT			
General ledgers											
Journals and analysis of ledgers											
Subsidiary ledgers											
57. BOOKS OF ORIGINAL ENTRIES:								PERMANENT			
Cash/check disbursements											
Cash receipts											
General journals											
Journals and analysis of obligations											
Journal of bills rendered											
Journals of checks issued											
Journals of collections and deposits											
Journals of disbursement by disbursing officers											
58. CONSOLIDATED ANNUAL AUDIT REPORTS								PERMANENT			
59. NOTICES OF TRANSFER ALLOCATION:								1 year		1	

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
60. QUARTERLY STATEMENT OF CASH ADVANCES:								5 years	5	10	
61. TRIAL BALANCES AND OTHER REPORTS:											
Cumulative results of operations unappropriated								PERMANENT			
Monthly, quarterly trial balances								5 years		5	After consolidated in the annual financial report
Preliminary/final annual trial balances											
Accountant's copy								5 years	5	10	After annual financial report has been published
Auditor's copy								PERMANENT			
Regional office copy								5 years	5	10	After annual financial report has been published
Pre/post closing trial balances								5 years		5	After annual financial report has been published
"BUDGET RECORD"											
62. AGENCY BUDGET MATRICES:								3 years		3	
63. BUDGET CIRCULARS AND ISSUANCES:								5 years	5	10	
64. BUDGET PROPOSAL AND SUPPORTING DOCUMENTS:								3 years		3	
65. GENERAL APPROPRIATION ACTS:								3 years		3	
66. MONTHLY CASH PROGRAMS:								3 years		3	
67. OBLIGATION REQUESTS:								3 years		3	
68. PHYSICAL AND FINANCIAL PLANS:								3 years		3	
69. PROGRAMS OF EXPENDITURES:								5 years	5	10	
Local											
National											
70. REGISTRIES OF ALLOTMENT								5 years		5	
71. SPECIAL ALLOTMENT RELEASE ORDERS (SARO):								3 years		3	
72. SUB-ALLOTMENT RELEASE ORDERS (SUB-ARO):								3 years		3	
"CASH RECORDS"											
73. FIDELITY BOND/BONDS								1 year		1	After renewed
74. OFFICIAL CASH BOOKS:								PERMANENT			
Collection											
Disbursement											
75. OFFICIAL RECEIPTS:								5 years	5	10	

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								Active	Storage	Total	
Rehabilitation											
Stick											
Study								1 year		1	After recorded in leave cards
Terminal								1 year		1	After recorded in leave cards
Vacation											
Violence against women and children (VAWC)											
Details											
Stations											
87. AUTHORITIES TO FILL VACANT POSITIONS:								2 years		2	After position ha been filled up
88. CLAIMS ON EMPLOYEES COMPENSATION:								5 years	5	10	
89. CERTIFICATES OF ELIGIBLES:								2 years		2	
90. CONTRACTS TO TEACH:								5 years	5	10	
91. DAILY TIME RECORDS:								1 year		1	After data have been posted in leave cards and post-audited
92. EQUIVALENT RECORDS FORMS WITH TRANSMITTAL								5 years		5	After separated from office
93. JOB ORDER CONTRACTS:								1 year		1	After terminated
94. LEAVE CARDS:								5 years	10	15	After separated /retired of concerned employee
95. LETTERS OF INTRODUCTION:								2 years		2	
96. MEDICAL CERTIFICATES DUE TO ILLNESS								3 years		3	
97. MEMBERSHIP FILES:											
GSIS								PERMANENT			
PAG-IBIG											
PHILHEALTH											
Others											
98. MONTHLY REPORTS OF SERVICE AND ATTENDANCE/ABSTRACTS OF ABSENCES:								2 years		2	
99. NEW APPRAISAL PERFORMANCE SYSTEM FILES:											
Performance appraisals/evaluations/rating reports								1 year		1	
Performance rating cards								5 years		5	
Performance target worksheet								1 year		1	
100. NOTICE OF ASSIGNMENTS:								1 year		1	
List											
Details											
Stations											
101. PERMITS TO STUDY/TEACH:								1 year		1	After renewed/terminated

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
102. PERSONNEL FOLDERS (201 FILES):								5 years	10	15	After retired/separated
Appointment											
Reappointment of teachers											
Approvals of retirement											
Awards											
Change of status											
Designations											
Dropping from the rolls (AWOL)											
First/last day of service certifications											
Longevity											
Notice of salary adjustment (NOSA)											
Notices of step increment (NOSI)											
Oaths of office											
Personal data sheets (latest)											
Position description forms											
PRC license											
Report of rating (eligibilities)											
Resignations/transfers/reinstatements/return to duty											
Separations											
Service records (updated)											
Transcript of records											
103. PERSONNEL SERVICES ITEMIZATION AND PLANTILLA OF PERSONNEL:								PERMANENT			Other copies dispose after 3 years
104. POSITION/ITEM FILES:								2 years		2	After follow-up/approval
Conversion											
Creation											
Deployment											
Extension											
Reclassification and transfer								2 years		2	After follow-up/approval
Requests for position											
105. PROMOTION RECORDS:								2 years		2	After vacant position has been filled
106. PUBLICATIONS OF VACANT POSITION:											
Filling up of positions								2 years		2	After vacant position has been filled
Protest ranking											
Recommendations											
107. RECORDS OF SERVICE CREDITS								1 year		1	After recording in the level codes
108. SCHOLARSHIP FILES:											
On-the-job trainees								2 years		2	
Students								1 year		1	
Teachers								4 years		4	

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								Active	Storage	Total	
109. SEPARATION ORDERS/EXTRACTS OF RETIRED/TRANSFERRED/SEPARATED PERSONNEL:								1 year		1	
110. SERVICE CARDS:								PERMANENT			
111. SERVICE RECORDS:								2 years		2	
112. STATEMENTS OF ASSETS AND LIABILITIES:								5 years	5	10	
"LEGAL SERVICES"											
113. ADMINISTRATIVE DECISIONS (WITH RESPECT TO CASES/ OPINIONS/ DECISIONS/ RESOLUTIONS /ORDERS)								PERMANENT			
114. CASES								4 years	3	7	After finally settled except decisions which are permanent
Administrative											
Civil service commission											
Department of education											
Ombudsman											
Civil/criminal											
115. COMPLAINTS/GRIEVANCES:								5 years		5	
Actions taken on the complaints											
Counter affidavits and/or answers											
Investigations reports											
Rejoinders											
Resolutions											
116. CONTRACTS OF SERVICE (CONTRACT RECORDS INCLUDING CORRESPONDENCES/RELATED PAPERS):								5 years		5	
117. CORRECTIONS OF NAME/BIRTH DATE								PERMANENT			
Personnel								PERMANENT			
Students								PERMANENT			
118. DEEDS (ACQUISITION OF BOOKS/TEACHING AIDS AND VEHICLES):								PERMANENT			
Donations								PERMANENT			
Sales								PERMANENT			
119. MEMORANDA OF AGREEMENT/UNDERSTANDING								PERMANENT			
"PHYSICAL FACILITIES AND SCHOOL ENGINEERING SERVICES"											
120. ASSESSMENT OF SCHOOL:								5 years		5	
121. EDUCATIONAL FACILITIES MANAGEMENT MANUALS:								PERMANENT			
122. INVENTORIES OF SCHOOL BUILDINGS AND FIXTURES:								1 year		1	After superseded

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
Supervisory plans											
163. ADMISSION TESTS								3 years		3	After admitted
164. APPLICATIONS											
Accreditations											
Enrollment											
Entrance examinations											
Graduation and special orders											
Permits/recognitions								2 years		2	After granted
165. ATTENDANCE SHEETS/ATTENDANCE REPORTS (FORM 2)								2 years		2	
166. BASIC SCHOOL MANAGEMENT COURSE TERM PAPERS								3 years		3	
167. BULLETIN OF INFORMATION								PERMANENT			
168. CALENDARS OF ACTIVITIES								1 year		1	
169. CASES/FEASIBILITY STUDIES/RESEARCHES								PERMANENT			
170. CLASS RECORDS											
Anecdotal records of pupils/students								5 years		5	After graduated
Class cards (form 138-A)								PERMANENT			
Class observation and supervisory reports (form 178)								PERMANENT			
Class schedules (form 30)								1 year		1	
Class values charts								1 year		1	
Diplomas								PERMANENT			
Lists of honor graduates								PERMANENT			
Nutritional status of pupils								2 years		2	
Report cards (form 138)								PERMANENT			
Student permanent records (form 137-A)								PERMANENT			
Summary of units taken (form 9)								PERMANENT			
171. CLASS AND TEACHERS PROGRAMS								PERMANENT			
Class programs (form 29)											
Summaries of information of teachers (form 31)											
Teachers' program (form 30)											
172. CONSOLIDATED DATA OF TEACHING/NON-TEACHING PERSONNEL (FORM 31)								5 years		5	After updated/superseded
173. COURSES OF STUDY/SYLLABI								PERMANENT			
174. ENROLLMENT SLIPS								1 year		1	
175. GRADING SHEETS								2 years		2	
176. LESSON PLANS								1 year		1	
177. LISTS											
Accredited courses/subjects								PERMANENT			
Candidate for graduation								PERMANENT			
Enrollment lists								2 years		2	
Graduates/honor graduates								PERMANENT			
School personnel and officials								1 year		1	After superseded

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
178. LIBRARY FILES											
Accession books (PF 146)								PERMANENT			
Book cards (PF 149)											
Borrower's cards								1 year		1	After date of last entry
Catalogue cards (PF150)								PERMANENT			
179. PERMITS:											
Government permits								PERMANENT			
Government recognitions								PERMANENT			
Permits to operate								5 years		5	After expired
Permits to study								2 years		2	
Tuition fee increase								5 years		5	
180. PROFILES											
Schools								PERMANENT			
Socio-economic of pupils								5 years		5	After graduated
Students								5 years		5	After graduated
Teachers								5 years	10	15	After separated/retired
181. PROPOSED ORGANIZATION OF CLASSES								PERMANENT			If implemented, otherwise dispose after 3 years
DepEd-MTAP											
Quiz bee											
Science quiz											
182. RANKING/LISTS OF HONOR STUDENTS								3 years		3	After graduated
183. RANKING OF TEACHER APPLICANTS								1 year		1	After updated
184. RECORDS OF STUDENT'S DISCIPLINARY ACTIONS								2 years		2	After graduated
185. REPORTS:											
Annual reports								PERMANENT			
Enrollment and attendance (form 3)								2 years		2	
Administrators											
Principals											
Monthly enrollment (form 2)								2 years		2	
Narrative reports of department heads								2 years		2	
Number of schools/students/promotions (summarized)								2 years		2	
Performance indicators (yearly report)								PERMANENT			
Physical inventory reports								2 years		2	
Reports on promotion								PERMANENT			
18-A secondary school								PERMANENT			
18-E1 primary grades I-IV								PERMANENT			
18-E2 intermediate grades V-VI								PERMANENT			
School fund/financial reports								5 years		5	
Summaries of monthly attendance (Form 7)								2 years		2	
Supervisory								2 years		2	

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								Active	Storage	Total	
11. ENDORSEMENTS								6 mos		6	To be filed with appropriate record series
12. FEASIBILITY STUDIES								PERMANENT			Permanent if implemented, otherwise dispose after 5 years from date of record
13. FREEDOM OF INFORMATION FILES											
Appeals								2 years		2	After acted upon / settled
Manual								PERMANENT			PERMANENT, other copies can be disposed of 2 years after revised/superseded
Report								1 year		1	After incorporated in the Annual Report
Request								1 year		1	After acted upon
14. GATE PASSES								6 months		6 months	
15. HEALTH DECLARATION / CONTACT TRACING								3 months		3 mos	After evaluated
16. INQUIRIES								2 years		2	After acted upon
17. INTERNATIONAL ORGANIZATION FOR STANDARDIZATION FILES								PERMANENT			Can be disposed 2 years after superseded
Documented Information Maintained								PERMANENT			Other copies can be disposed of 2 years after superseded
Code of Practice/Procedure											
Forms								1 year		1	After revised/superseded
Plans								1 year		1	After revised/superseded
Action								3 years		3	After implemented
Quality								2 years		2	After superseded
Quality Management Policy								PERMANENT			Permanent, other copies can be disposed of 2 years after superseded
Documented Information Retained											
Quality Objectives								3 years		3	After superseded
Functional Quality and Action Plan											
Top level and functional											
Auditor/Auditee Evaluation								2 years		2	
Competency Gap Assessment for Auditors								3 years		3	After evaluated
Conference Notice								2 years		2	
Context of the Organization Logs (COTO)											
Feedback Mechanism / customer satisfaction survey/Issue Logs								3 years		3	After evaluated
Stakeholders Analysis/Requirements								3 years		3	
18 Strengths, Weaknesses, Opportunities, Threats (SWOT) Document								1 year		1	

1 RECORDS SERIES TITLE AND DESCRIPTION	2 PERIOD COVERED	3 VOLUME IN CUBIC METER	4 LOCATION OF RECORDS	5 FREQUENCY OF USE	6 DUPLICATION	7 TIME VALUE T/P	8 UTILITY VALUE Adm/F/L/Arc	9 RETENTION PERIOD			10 Disposition Provision
								Active	Storage	Total	
Document Review and Approval Form								3 years		3	
Masterlists								PERMANENT			
Minutes of Management Review/ IQA Meeting								4 years		4	
Non-Conformity Matrix								2 years		2	
Quality References (QR)								3 years		3	
Reports											
External/ Internal Quality Audit (IQA)								4 years		4	
IQA Status								2 years		2	
Key Performance Measures Summary/ Graph Analysis								3 years		3	
Monthly Accomplishment Summary								3 years		3	
Non-Compliance and Corrective Action								4 years		4	
Quality Workplace Evaluation								2 years		2	After evaluated
Root Cause Analysis								2 years		2	
Risk/Opportunity Register								3 years		3	
ISO Certifications											Permanent, other copies can be disposed of 2 years after expired/renewed
18. ISSUANCES											
Issued by or for the head of agency documenting policies/functions/programs of the agency								PERMANENT			
Issued by or for the head of agency reflecting routine information or instruction								2 years		2	After superseded
19. LISTS								1 year		1	After updated
Associations											
Committees											
Cooperatives											
Donors											
Mailings											
20. LOGBOOKS								2 years		2	
Incoming/Outgoing Correspondences								2 years		2	After date of last entry
Visitors											
Ordinary								2 years		1	After date of last entry
Very Important								PERMANENT			
21. MANUALS OF OPERATION										1	Permanent, other copies can be disposed of 5 years after revised
22. MEETINGS/PROCEEDING MEETINGS											
Agenda								1 year		1	
Minutes								1 year		1	

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								Active	Storage	Total	
Advices											
Allotment								3 years		3	
Modification (MAF)								3 years		3	After settled
Use of personal service (PS)								3 years		3	After settled
Agency budget matrixes								3 years		3	
Allotment release orders								3 years		3	
General (GARO)											
Saro (SARO)											
Obligation requests/slips (ORS formerly ALOBS)								3 years		3	
Plan of work and request of allotment								3 years		3	
Registries								10 years		10	
Allotment, obligations, and disbursement											
Capital outlays (RAODCO)											
Financial expenses (RAODFE)											
Maintenance and other operating expenses											
Personal services (RAODPS)											
Budget, utilizations, and disbursement											
Request for obligation of allotment (ROA)								3 years		3	
Statement of allotment, obligations, and balances (SAOB)								3 years		3	
Statement of appropriations, allotment, and advice (SAAA)								3 years		3	
37. ANNUAL/SPECIAL/SUPPLEMENTAL BUDGETS								3 years		3	
38. BUDGET AND FINANCIAL ACCOUNTABILITY REPORTS								3 years		3	
Aging of due and demandable obligations (ADDO)-FAR no. 3											
Lists of allotments and sub-allotments (LASA)-FAR no. 1-B											
Monthly report of disbursements (MRD)-FAR no. 4											
Quarterly physical report of operation (QPRO)- BAR no. 1											
Quarterly report of revenue and other receipts (QRROR)-FAR no. 5											
Statement of appropriations, allotments, and obligations											
Disbursements and balances (SAAODB)-FAR no. 1											
Balances (SABUD)-FAR no. 2 (for off-budget fund)											

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								Active	Storage	Total	
Summary of appropriations, allotments, obligations, disbursements and balances by object of expenditures (SAAODBOE)-FAR no. 1-A											
Summary of approved budget, utilizations, disbursements and balances by object of expenditures (SABUDBOE)-FAR no. 2-A (for off-budget fund)											
39. BUDGETARY CEILINGS								3 years		3	
40. BUDGET ESTIMATES INCLUDING ANALYSIS SHEETS AND ESTIMATES OF INCOME								3 years		3	
41. BUDGET EXPENDITURES								5 years		5	
Programs											
Source of financing											
42. BUDGET ISSUANCES (THOSE USED AS AUTHORITY FOR AGENCY TRANSACTIONS)								10 years		10	
43. BUDGET PROPOSALS								3 years		3	
44. BUDGET SHEET ANALYSIS								3 years		3	
45. BUDGET UTILIZATION REQUEST AND STATUS (BURS)								3 years		3	
46. GENERAL APPROPRIATIONS ACT								3 years		3	
47. NOTICES								3 years		3	
Allocations											
Cash											
Transfer											
Request and status adjustment											
Budget utilization											
Obligation											
48. ORGANIZATIONAL PERFORMANCE INDICATOR FRAMEWORK (OPIF)									PERMANENT		
49. SPECIAL/SUPPLEMENTAL BUDGETS								3 years		3	
50. WORK AND FINANCIAL PLANS								3 years		3	
"FINANCIAL AND ACCOUNTING RECORDS"											
51. ABSTRACTS											
Daily collections								5 years		5	
Deposits and trust funds								5 years		5	
General collections								5 years		5	
Sub-vouchers								2 years		2	
52. ADVICES											
Checks issued and cancelled								4 years		4	
Remittance								10 years		10	
53. ANNUAL STATEMENTS OF ACCOUNTS PAYABLE									PERMANENT		
54. AUDITOR'S CONTRACT CARDS								3 years		3	
55. AUTHORITIES FOR ALLOWANCES								2 years		2	After terminated

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								Active	Storage	Total	
62. CERTIFICATES								10 years		10	Provided post-audited, finally settled, and not involved in any case
Settlement and balances											
Shortages											
63. CERTIFICATIONS OF AVAILABILITY OF FUNDS								1 year		1	After settled
64. CHECKS AND CHECK STUBS								10 years		10	Provided post-audited, finally settled, and not involved in any case
65. CLAIMS								10 years		10	After settled
Health benefits											
Hospital											
Insurance											
66. COMMISSION ON AUDIT FILES								10 years		10	After complied/settled
Findings and recommendations											
Management letters											
Reports											
Annual audit											
Observation											
67. DAILY CASH FLOW								3 years		3	After settled
68. DAILY STATEMENT OF COLLECTIONS								5 years		5	
69. FINANCIAL STATEMENTS								PERMANENT			
Balance sheets											
Cash flows (annual)											
General purpose											
Income											
Operations											
70. INDICES OF PAYMENTS											
Creditors								5 years		5	
Employees								15 years		15	After retired/separated
Sundry payments by checks/warrants								PERMANENT			
71. ITINERARY OF TRAVEL								1 year		1	
72. JOURNAL ENTRY VOUCHERS								12 years		12	Provided post-audited, finally settled, and not involved in any case
73. LIST OF DUE AND DEMANDABLE ACCOUNTS PAYABLE-AUTHORITY TO DEBIT ACCOUNTS								4 years		4	After settled/post-audited
74. LISTS OF REMITTANCES								10 years		10	After updated and reconciled
Loans											
Premiums											
75. LOGBOOKS OF GENERAL FUNDS								3 years		3	After date of last entry
76. MONTHLY SETTLEMENTS OF MONTHLY SUBSIDIARY LEDGER BALANCE								2 years		2	Provided settled
77. NOTICES								3 years		3	After settled

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								Active	Storage	Total	
Cash allocation											
Disallowances											
Dishonored checks											
Suspensions											
Transfer of allocation											
78. OFFICIAL CASH BOOKS								PERMANENT			
79. OFFICIAL RECEIPTS											
								10 years		10	Provided post-audited, finally settled, and not involved in any case
80. ORDERS OF PAYMENT								10 years		10	After settled
81. PAYROLLS											
								10 years		10	Provided post-audited, finally settled, and not involved in any case
82. PAYROLL PAYMENT SLIPS/PAY SLIPS								10 years		10	Provided settled
83. QUARTERLY STATEMENTS OF CHARGES TO ACCOUNTS PAYABLE								10 years		10	
84. REGISTERS								PERMANENT			
Accounts written off											
Checks released											
Checks/warrants control											
Payroll											
Petty cash fund											
85. RELIEFS FROM ACCOUNTABILITY											
								10 years		10	Provided a copy is filed with 201 files
Decisions											
Requests											
86. REPORTS											
Accountabilities for accountable forms								3 years		3	After cash had been examined
Cash disbursements								10 years		10	After settled
Cash examinations								3 years		3	Provided post-audited, finally settled, and not involved in any case
Collecting and disbursing officers								10 years		10	Provided post-audited, finally settled, and not involved in any case
Checks issued and cancelled											
Collection and deposit											
Disbursements											
Daily cash								3 years		3	
Liquidations								10 years		10	
Monthly income								10 years		10	
87. Overdrafts and misuse of trust funds											
								5 years		5	After case had been settled or terminated

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								Active	Storage	Total	
Petty cash											
Fund											
Paid vouchers											
Replenishments											
87. SCHEDULE OF ACCOUNTS RECEIVABLE/PAYABLES								3 years		3	
88. STATEMENTS											
Accounts								3 years		3	
Current								3 years		3	
Payable								10 years		10	
Receivable								PERMANENT			
Common funds								10 years		10	
Financial conditions								10 years		10	
Profits and losses								PERMANENT			
Reconciliations								10 years		10	
89. SUMMARIES OF ACCOUNTS RECEIVABLES/PAYABLES								10 years		10	After settled
90. SUNDRY PAYMENTS								10 years		10	
91. TREASURY FILES								10 years		10	
Checking accounts of agency (TCAA)											
Drafts											
Warrants											Provided post-audited, finally settled, not involved in any case
92. TRIAL BALANCES AND SUPPORTING SCHEDULES											
Cumulative results and operations-unappropriated								PERMANENT			
Monthly/quarterly trial balances								2 years		2	After consolidated in the Annual Financial Report
Preliminary/ final annual trial balances											
Accounting's office copy								10 years		10	After annual financial report had been published
Auditor's copy								PERMANENT			
Regional office copy								10 years		10	After annual financial report had been published

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								Active	Storage	Total	
93. VOUCHERS INCLUDING BILLS, INVOICES AND OTHER SUPPORTING DOCUMENTS								10 years		10	Provided post-audited, finally settled, and not involved in any case for COA and accounting/office/department/division/section/unit. All other copies dispose after 1 year
Disbursements/journals											
Petty cash											
Reimbursement expense receipts											
Travel expenses											
94. WITHHOLDING TAX CERTIFICATES								4 years		4	After superseded
"HUMAN RESOURCE/PERSONNEL MANAGEMENT RECORDS"											
95. ANNUAL SUMMARY REPORTS FOR REPLACEMENT PROGRAM FOR NON-ELIGIBLES								5 years		5	
96. APPLICATIONS											
Leave of absence and supporting documents								1 year		1	After recorded in leave card
Relief of accountability								5 years		5	After separated/retired
Retirement/resignation								1 year		1	
97. ATTENDANCE MONITORING SHEETS								1 year		1	
98. AUTHORITIES/REQUESTS TO CREATE OR FILL VACANT POSITIONS								2 years		2	After vacant positions had been filled up
99. AWARDS/BENEFITS/GRATUITY								5 years		5	After retired/separated from service
100. CERTIFICATES								5 years		5	After retired/separated from service
Rural service											
Trainings/seminars attended											
101. CERTIFICATIONS								1 year		1	
Employment											
Residency											
Service											
102 CHANGE OF MARITAL STATUS								5 years		5	After retired/separated from office
103 COMPARATIVE DATA MATRIX OF EMPLOYEES								2 years		2	
104. DAILY TIME RECORDS								1 year		1	After data had been posted in leave cards and post-audited
105. DESIGNATIONS/DETAILS								5 years		5	After retired/separated from service
106. DUTIES AND RESPONSIBILITIES								5 years		5	After retired/separated from service

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								Active	Storage	Total	
107. EMPLOYMENT/PROMOTION FILES								1 year		1	After vacant positions had been filled up
Application letters with supporting documents											
Comparative assessment/evaluation											
Interview evaluation/score sheets											
Summary of rating											
Test papers											
108 GENDER AND DEVELOPMENT FILES								2 years		2	After purpose had been served
Accomplishment reports											
Plans and budget											
109 HAND WRITING SPECIMENS / SIGNATURE								PERMANENT			
110 JOB ORDER EMPLOYMNET CONTRACTS WITH SUPPORTING DOCUMENTS								5 years		5	After terminated
111. LEAVE CREDIT CARDS								15 years		15	After settled
112. LISTS OF ELIGIBLES/NON-ELIGIBLES								1 year		1	After updated
113. LOGBOOKS											
Arrival and departure of employees								2 years		2	After date of last entry
Attendance								1 year		1	Provided leave and undertimes are posted in the leave card
Clearances issued								2 years		2	After date of last entry
114. MEDICAL CERTIFICATES IN SUPPORT OF ABSENCE ON ACCOUNT OF ILLNESS/MATERNITY/RETURN TO WORK								3 years		3	After absences had been recorded in leave cards
115. MEMBERSHIP FILES								15 years		15	After mandatory retirement and settled
GSIS											
Pag-ibig											
PhilHealth											
116. MERIT SELECTION AND PROMOTION PLANS								1 year		1	After superseded
117 ON THE JOB TRAINING FILES											
Certificate of Completion								1 year		1	
Memorandum of Agreement								1 year		1	After Certificate of Completion has been issued
Recommendation with student profile								1 year		1	After Certificate of Completion has been issued
118 PERFORMANCE BASED BONUS RECORDS								3 years		3	
119 PERFORMANCE FILES											

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								Active	Storage	Total	
Assumption to duty											
Certificates											
Eligibility											
Leave credits											
Clearance (latest)											
Notice of salary adjustments (step increment/tranche)											
Oath of office											
Personal data sheet (curriculum vitae/resume)											
Position descriptions											
Service records (updated)											
Statements of assets, liabilities, and networth (SALN)											
125 PLANTILLA OF PERSONNEL								PERMANENT			Other copies dispose after 3 years
126 POSITION ALLOCATION LIST								3 years		3	
127 POSITION CLASSIFICATIONS AND PAY PLANS								5 years		5	After superseded
128 RECOMMENDATIONS/REFERRALS								1 year		1	After acted upon
129 REPORTS											
Examinations								1 year		1	
Personnel actions								PERMANENT			
130 REQUESTS								1 year		1	After acted upon/cleared
Accumulated Leave Credits											
Approval on Promotions											
Changes of Status											
Monetization											
Reinstatements											
Transfers											
131 RETURN SERVICE CONTRACT								5 years		5	After fulfilled
132 SERVICE CARDS								PERMANENT			
133 STAFFING PATTERNS								PERMANENT			
INFORMATION TECHNOLOGY RECORDS											
134 COMPUTER REPAIR HISTORY RECORDS								1 year		1	After equipment had been disposed
135 DATABASES								1 year		1	After equipment had been disposed
136 DIGITAL MEDIA FOR DISASTER RECOVERY								2 years		2	After system had been decommissioned, obsolete and migrated
137 INFORMATION SYSTEM STRATEGIC PLANS											PERMANENT if implemented otherwise dispose after 5 years
138 INFORMATION SYSTEM STRATEGIC PLANS								3 years		3	

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								Active	Storage	Total	
"PROCUREMENT AND SUPPLY RECORDS"											
162 ACKNOWLEDGEMENT RECEIPTS FOR EQUIPMENTS (ARE) / MEMORANDUM RECEIPTS (MRE), SEMI-EXPENDABLE AND NON-EXPENDABLE PROPERTIES								1 year		1	After equipment had been returned / disposed
163 AGENCY PROCUREMENT COMPLIANCE AND PERFORMANCE INDICATORS								2 years		2	
164 BID AND AWARDS COMMITTEE FILES								5 years		5	After contract of winner had been terminated / settled, others disposed after 1 year
Abstracts											
Invitations											
Minutes											
Pre / post qualifications											
Publications											
Resolutions											
165 BILLS OF LADING								2 years		2	After delivery had been accepted
166 BIN / STOCK CARDS											
Property								1 year		1	After property had been disposed
Supplies								3 years		3	After date of last entry
167 CANVASS OF PRICES								2 years		2	
168 DELIVERY RECEIPTS								2 years		2	
169 DISPOSAL COMMITTEE RESOLUTIONS								5 years		5	After equipment had been disposed
170 INVENTORY AND INSPECTION REPORTS OF PROPERTIES								1 year		1	After property had been disposed
171 INVENTORY FILES											
Custodian slips								1 year		1	After supply / equipment had been returned
Equipment and supplies								1 year		1	After updated
Tag cards								1 year		1	After updated
172 INVOICES / RECEIPTS											
Accountable forms (accomplished)								3 years		3	After issuance of clearance had been terminated / after property had been returned
Deliveries on supply open-end order contracts								5 years		5	

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								Active	Storage	Total	
Properties / transfer of properties								3 years		3	After issuance of clearance had been terminated / after property had been returned
173 JOB ORDERS								1 year		1	
174 LISTSO F SUPPLIES UNDER SUPPLY OPEN-END								5 years		5	
175 PROCUREMENT PLANS / PROGRAMS								3 years		3	
Annual											
Project procurement management (PPMP)											
176 PROPERTY, PLANT AND EQUIPMENT LEDGER CARDS								2 years		2	After equipment had been disposed
177 PURCHASE FILES											
Orders								4 years		4	
Requests								1 year		2	
178 QUERIES ON PRICES OF ARTICLES, ADDITIONAL FUNDS TO MEET QUOTATIONS								1 year		1	
179 REPORTS											
Fuel consumption								2 years		2	
Incident								2 years		2	After acted upon
Inspection and acceptance								2 years		2	
Lost, stolen, damaged and destroyed property								2 years		2	
Physical count								3 years		3	After audited
Inventories											
Property, plant, equipment											
Semi-expendable property											
Procurement monitoring								2 years		2	
Property transfer								1 year		1	After property had been disposed
Supplies and materials issued								1 year		1	
Waste materials								2 years		2	
180 REQUISITION AND ISSUE SLIPS / REQUISITION ISSUE VOUCHERS								1 year		1	File with appropriate record series
181 SHIPPING AND PACKING LISTS ON ITEMS PURCHASED								1 year		1	
182 SUPPLIES IDENTIFICATION CERTIFICATES WITH PROCUREMENT								2 years		2	After renewed
183 SUPPLIES FILES											
Adjustment sheets								1 year		1	After post-audited
Availability inquiries								1 year		1	
Ledger cards								5 years		5	
Purchase journals								5 years		5	
"TRAINING RECORDS"											

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								Active	Storage	Total	
184 APPLICATIONS								1 year		1	After obligatory requirement had been settled
185 ATTENDANCE SHEETS								6 months		6 months	After scanned and stored to database
186 CALENDARS								1 year		1	After superseded
187 COURSE DESIGNS / OUTLINES / SYLLABI								1 year		1	After superseded
188 EVALUATIONS											
Pre / post								1 year		1	After incorporated in the summary report
Summary								2 years		2	
Survey questionnaires								1 year		1	After data had been evaluated
189 FEEDBACK								1 year		1	
190 HANDOUTS								1 year		1	After superseded
191 INVITATIONS								1 year		1	
192 LIST OF SEMINARS CONDUCTED / COORDINATED								1 year		1	
193 MASTERLISTS OF PARTICIPANTS								PERMANENT			
194 NOMINATIONS								1 year		1	
195 PRESS / PHOTO RELEASES (ABOUT OR BY THE AGENCY)								PERMANENT			
196 PROGRAMS / PLANS								1 year		1	After superseded
197 REPORTS								2 years		2	
198 REQUESTS								1 year		1	After acted upon
In-house trainings											
Quotations											
Refunds											
199 RESOURCE SPEAKER PROFILES								1 year		1	
200 SCHEDULES OF TRAINING / SEMINAR								1 year		1	After superseded
201 WORKSHOP RESULTS								1 year		1	

Adm - admin

L - Legal

Arc - Archival

LEGEND:

TIME VALUE:

T - Temporary P - Permanent

UTILITY VALUE:

Adm - Administrative F - Fiscal

PREPARED BY:

ASSISTED BY:

APPROVED BY:

Name and Position

NAP Records Management Analyst

Chief of the Division/Department