

RECORDS RETENTION AND DISPOSITION SCHEDULE GENERAL SCHEDULE NO. 107

FOOD SERVICE RECORDS

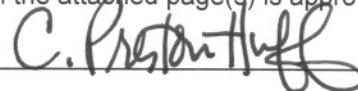
ALL STATE AGENCIES

AGENCY OPERATED FOOD SERVICE FACILITIES

(Refer to <http://www.lva.lib.va.us/state/records/schedule/state-gs.htm> for latest version of this schedule)

The schedule on the attached page(s) is approved with agreement to follow the records retention and disposition conditions listed below:

APPROVED:



, STATE RECORDS ADMINISTRATOR

EFFECTIVE SCHEDULE DATE: May 21, 2001

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CONDITIONS FOR RECORDS RETENTION AND DISPOSITION

1. This schedule is continuing authority under the provisions of the *Virginia Public Records Act*, §§ 42.1-76, et. seq. of the *Code of Virginia* for the retention and disposition of the records as stated on the attached page(s).
2. This schedule supersedes previously approved applicable schedules.
3. This schedule is used in conjunction with the *Certificate of Records Disposal* (Form RM-3). A signed RM-3 must be approved by the designated records officer and on file in the agency or locality before records can be destroyed. After the records are destroyed, the original signed RM-3 must be sent to Library of Virginia (LVA).
4. Any records created before the Constitution of 1902 came into effect (January 1, 1904) must be offered, in writing, to the LVA before applying these disposition instructions. Offered records can be destroyed 60 days after date of the offer if no response is received from the LVA. A copy of the offer must be attached to the RM-3 form when it is submitted to the LVA.
5. All known audits and audit discrepancies regarding the listed records must be settled before the records can be destroyed.
6. All known investigations or court cases involving the listed records must be resolved before the records can be destroyed. Knowledge of subpoenas, investigations or litigation that reasonably may involve the listed records suspends any disposal or reformatting processes until all issues are resolved.
7. The retentions and dispositions listed on the attached page(s) apply regardless of physical format, i.e., paper, microfilm, electronic storage, optical imaging, etc. Microfilming must be done in accordance with §§ 17VAC15-20-10, et. seq. of the *Virginia Administrative Code*, "Standards for the Microfilming of Public Records for Archival Retention."
8. Custodians of records must ensure that information in confidential or privacy protected records is protected from unauthorized disclosure through the ultimate destruction of the information. Normally, destruction of confidential or privacy-protected records will be done by shredding or pulping. "Deletion" of confidential or privacy-protected information in computer files or other electronic storage media is not acceptable. Electronic records must be "wiped" clean or the storage media physically destroyed.

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| RECORDS SERIES TITLE AND DESCRIPTION | SERIES NUMBER SCHEDULED RETENTION AND DISPOSITION |
|--|--|
| <u>Cook and Meal Evaluations</u> This series documents any records created to evaluate or inspect cooks, food preparation, food quality or food service. | 012254 Retain 1 year after evaluation, then destroy. |
| <u>Cook's Worksheets</u> This series documents any records created to control the meal preparation process, including, but not limited to assignments, recipes to be used, start times, cooking times, and supplies or foodstuffs to be used. | 012255 Retain 1 month after meal date, then destroy. |
| <u>Diet Records</u> This series documents the receipt of and compliance with special diet requirements for selected individuals, generally based on special medical or religious needs. | 012256 Retain 1 year or until completion of any required certification audit, whichever is greater; then destroy in compliance with No. 8 on schedule cover page. |
| <u>Employee Health Certificate</u> This series documents the receipt of medical clearance for employees to work in food service operations. | Refer to records series 012261, "Health Certificates". |
| <u>Fiscal Accounting Records</u> This series includes any records created to account for, monitor or control funds spent or collected by the food service activity. | Refer to <i>General Records Retention and Disposition Schedule No. GS-102, Fiscal Records</i> for retention guidelines. |

Cook and Meal Evaluations
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Cook's Worksheets
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Diet Records
This series documents the receipt of and compliance with special diet requirements for selected individuals, generally based on special medical or religious needs.

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Employee Health Certificate
This series documents the receipt of medical clearance for employees to work in food service operations.

Refer to records series 012261, "Health Certificates".

Fiscal Accounting Records
This series includes any records created to account for, monitor or control funds spent or collected by the food service activity.

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| RECORDS SERIES TITLE AND DESCRIPTION | SERIES NUMBER SCHEDULED RETENTION AND DISPOSITION |
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| <u>Food Allotment Records</u> This series documents the request, issue and control of bulk foods received by the facility from any source, including USDA, vendors and agency warehouses. | 012258 Retain 2 years or until completion of any required certification audit, whichever is greater; then destroy. |
| <u>Food Cost Records</u> This series documents the control of food costs, including but not limited to: average meal costs, recipe costs and special dietary costs. | 012259 Retain 3 years or until completion of any required certification audit, whichever is greater; then destroy. |
| <u>Food Issue Records</u> This series documents the internal control of foodstuffs and condiments, includes issues to cooks and other kitchen workers, and disposal of spoiled items. | 012260 Retain 2 years or until completion of any required certification audit, whichever is greater; then destroy. |
| <u>Health Certificates</u> This series documents the receipt of medical clearance for employees, volunteers, students, patients or inmates to work in food service operations. | 012261 Retain 2 years after departure/reassignment of individual or completion of any required certification audit, whichever is greater; then destroy in compliance with No. 8 on schedule cover page. |
| <u>Hi/Low Sheets</u> This series includes records of meals prepared versus meals actually served and any other record kept to assist in predicting future number of meals to be served. | 012262 Retain 1 year or until completion of any required certification audit, whichever is greater; then destroy. |

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Health Certificates
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012261 Retain 2 years after departure/reassignment of individual or completion of any required certification audit, whichever is greater; then destroy in compliance with No. 8 on schedule cover page.

Hi/Low Sheets
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| <u>Housekeeping/Cleanup Records</u> This series includes any record used to assign housekeeping or cleanup responsibilities, document completion of assignments or evaluate performance of assignments. | 012263 Retain 1 month, then destroy. |
| <u>Inventory Records - Knives and Tools</u> This series documents any required daily control or inventory of knives and other utensils or equipment for security purposes. | 012264 Retain 1 year or until completion of any required certification audit, whichever is greater; then destroy. |
| <u>Inventory Records - Other Inventories</u> This series documents other inventories not listed on this schedule or other schedules. | 012265 Retain as long as administratively necessary, then destroy. |
| <u>Inventory Records - Perpetual Inventories of Stocks</u> This series documents the routine control of foodstuffs, condiments and other consumable supplies. | 012257 Retain 6 months after stocks reduced to zero balance, inventory transferred to a new record or in accordance with agency policy, whichever is greater; then destroy. |
| <u>Logs, Checklists or Control Records</u> This series includes any food service log, checklist or control record not otherwise listed on this schedule. | 012266 Retain 1 year, then destroy. |
| <u>Meal Count Sheets</u> This series documents the completion of daily counts, registers or sign-in sheets the track the number or names of diners at each meal. | 012267 Retain 1 month, then destroy. |

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| <u>Menus and Standardized Recipes</u> This series includes all required or standardized menus that are used by kitchen personnel. | 012268 Retain until superseded, obsolete or rescinded, then destroy. |
| <u>Modified Diet Census</u> This series includes any records used to collectively plan the preparation of special diet requirements over time, including menu planning and special orders. | 012269 Retain 6 months, then destroy in compliance with No. 8 on schedule cover page. |
| <u>Sanitation Inspections</u> This series documents the routine inspection of sanitary conditions in food preparation, storage or serving areas. | 012270 Retain 2 years after inspection or until completion of any required certification audit, whichever is greater; then destroy. |
| <u>Sanitation/Safe-Serv Certifications</u> This series documents certification that an individual has passed a course on sanitary/safe handling of food, utensils, cooking equipment and serving lines. | 012702 Retain 1 year after end of food service duty/employment or until next certification, then destroy. |
| <u>USDA Refund Requests</u> This series documents requests to the US Department of Agriculture (USDA) for refund of expenditures in support of USDA sponsored programs. | 012271 Retain 3 years after request or until audited, whichever is greater; then destroy (7CFR250.16). |

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RECORDS SERIES TITLE AND DESCRIPTION

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USDA Reports

This series documents the preparation and submission of reports required by the US Department of Agriculture (USDA) to control USDA provided foodstuffs, condiments or funds.

012272

Retain 3 years after report submission or until audited, whichever is greater; then destroy (7CFR250.16).