

**LOCAL GOVERNMENT GENERAL RECORDS RETENTION SCHEDULE
PURCHASING**

SERIES #	SERIES TITLE AND DESCRIPTION	VITAL	RETENTION INSTRUCTIONS
LGPUR-001	<p>BIDS, BID SPECS, QUOTES</p> <p>Include bid worksheets showing date and time bid received, total bid price, percentage rates, pay periods, name of bidder, and total cost of equipment or services to be purchased. May also include copy of advertisement of invitation to bid or memo requesting bidders, specifications, copy of purchase order, and copy of contract. Quote information is similar but may be handled by telephone. NOTE: For retention of accepted bids, see LGPUR-011.</p>		Retain at agency 1 yr; successful audit; destroy.
LGPUR-002	<p>PURCHASE ORDERS</p> <p>May also be called Vendor Files. Generally includes copy of purchase order, invoice, check voucher, purchase requisition, and bill of lading. A handwritten logbook posting purchase order number, vendor name, department requesting, date, and requisition number may accompany the file.</p>		Retain at agency 3 yrs; successful audit; destroy.
LGPUR-003	<p>INVOICES</p> <p>Records documenting the procurement of goods and services. May include purchase requisitions, date of invoice, number of items received, description of item, invoice number, purchase order number, vendor, unit, and total price of goods. Usually filed chronologically.</p>		Retain at agency 3 yrs; successful audit; destroy.
LGPUR-004	<p>RECEIVING REPORTS</p> <p>Listing of items delivered to purchaser. Used to ensure the shipment is correct and complete.</p>		Retain at agency; successful audit; destroy.
LGPUR-005	<p>ADVERTISEMENTS FOR BIDS</p> <p>Copies of information published in newspapers (i.e., equipment insurance bids, oil bids, audit bids, etc.), and affidavits or tear sheets supporting information advertised. Retained as proof of bidding process. Records related to capital improvements should be included in Project Files (LGPLN-008).</p>		Retain at agency; successful audit; destroy.

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LGPUR-006	BID TABULATIONS Tabulation of all bids received and comparisons.		Retain at agency 1 yr; successful audit; destroy.
LGPUR-007	ISSUE TICKETS OR RECEIPTS For gasoline, oil, rock, gravel or other consumable supplies issued for authorized use.		Retain at agency 3 yrs; successful audit; destroy.
LGPUR-008	PACKING SLIPS, SHIPPING TICKETS, BILLS OF LADING Records transmitted or packaged with shipments of materials or supplies.		Retain at agency 3 yrs; successful audit; destroy.
LGPUR-009	PERFORMANCE GUARANTEES/WARRANTIES Performance guarantees or written warranties of vendors related to materials or supplies purchased.		Retain at agency 3 yrs after expiration of warranty; successful audit; destroy.
LGPUR-010	VENDOR LISTS List of vendors doing business with local governments.		Retain at agency 3 yrs; successful audit; destroy.
LGPUR-011	CONTRACTS, AGREEMENTS, AND LEASES Formal contracts between agencies and vendors for the furnishing of goods and services. Include copies of specifications, advertised bid proposals, and correspondence.		Retain at agency 3 yrs after completion of project or agreement; successful audit; destroy.
LGPUR-012	MATERIALS/SUPPLIES SPECIFICATIONS Specifications for materials, supplies, and services not connected with capital construction.		Retain at agency 3 yrs; successful audit; destroy.
LGPUR-013	PURCHASE REGISTERS Registers, summaries, schedules, or similar records created by purchasing office to list invoices or similar records received.		Retain at agency 3 yrs after final entry; successful audit; destroy.