

Frequently Asked Questions (FAQs) about DOE 2.4, Employee Compensation and Benefits Records

INTRODUCTION

1. What is the purpose of DOE 2.4?

DOE 2.4 is written in the same format as GRS 2.4, which provides disposition authority for records created and received while conducting payroll functions and while managing programs that offer employees monetary or other tangible benefits and includes records for the Health Compensation Program that are not covered by GRS 2.4.

2. From whom may I request more information about this schedule?

Contact the DOE Records Disposition Schedule Technical Team at DOERM@hq.doe.gov with any questions about this schedule.

3. How does DOE 2.4 differ from the old DOE Administrative Schedule?

Twenty-one (21) DOE records disposition schedule items four (4) in part that did not have a GRS authority have been incorporated into the DOE 2.4, Employee Compensation and Benefits Records schedule. Through careful review and consolidation of like items/retentions, the total schedule items were reduced to thirteen (13) DOE records disposition schedule items, with three (3) utilizing GRS authorities with a longer retention. Seven (7) DOE records disposition schedule items crosswalk to GRS items and one (1) DOE records disposition schedule item was rescinded. When schedule consolidation involved multiple retentions, the longer retention was applied.

- Item 010 – Employee Payroll for each Pay Period

Three (3) DOE records disposition schedule items, two (2) in part, and two (2) GRS items were consolidated into one (1) schedule item. The GRS authorities are ADM 2.1a, which was rescinded and ADM 2.1b initially cross walked to GRS 2.4, item 040, both listed under the DOE EPI moratorium and are needed for Health and Safety Programs; therefore, consolidated into DOE 2.4, item 010.

In the days that payroll was processed entirely on paper, an “individual earning and service card” (Optional Form 1127) did indeed track an individual’s entire payroll history in a single spot. These very useful cards became a casualty of automation. Currently due to automation, these are instead pay-period batches of an agency’s entire payroll for each of 26 pay periods per year, arranged within the batch by personal identifiers (generally social security numbers). Although an “Individual Pay Record” can be created from these records, no such standalone record exists without the research. DOE created a records disposition schedule item to cover these records and updated the title to match that of the GRS, “Employee Payroll Record for Each Pay Period.”

Previously:

- GRS 2.1a (rescinded by NARA) (EPI)
- GRS 2.1b (initially crosswalked to GRS 2.4, item 040) (EPI)
- ADM 2.1c (EPI)
- N1-434-98-1, item 20a(1) (Uranium Mill Tailings Remedial Action (UMTRA) Project) (in part)
- N1-434-98-1, item 20a(2) (Uranium Mill Tailings Remedial Action (UMTRA) Project) (in part)

* N1-434-98-1 (Uranium Mill Tailings Remedial Action (UMTRA) Project), items 20a(1) and 20a(2) are subcontractor procurement records that included Davis-Bacon payroll records. These items crosswalk in part, as Davis-Bacon payroll records crosswalk to DOE 2.4, item 010 and procurement records crosswalk to GRS 1.1, Item 010.

Note: Remains under EPI Moratorium until DOE lifts the hold.

- Item 020 – Time and Attendance Source and Input Records – Detailed records that include work locations

A new DOE records disposition schedule item was created that consolidated two (2) GRS items (in part, legacy only) utilizing the GRS 2.4, item 030 authority, which allows for longer retention. Retention was increased to 250 years, as these are needed to support departmental Health and Safety Programs. The time and attendance source and input records have been split between items 020, 025, and 030, with item 020 covering records that contain work locations for specific days/times, charge codes or other identifiers that could place an employee in a particular location or project/operations.

Note: Remains under EPI Moratorium until DOE lifts the hold.

- Item 025 – Time and Attendance Source and Input Records – Records that do not contain work locations (Federal)

A new DOE records disposition schedule item was created that consolidated two (2) GRS schedules in part utilizing the GRS 2.4, item 030 authority, which allows for longer retention. Retention was increased to 10 years, as these are needed to support the Office of Inspector General's (OIG) mission of preventing fraud, waste and abuse in DOE programs and operations. The time and attendance source and input records have been split between items 020, 025, and 030, with item 025 covering records that do not contain work locations for specific days/times, charge codes or other identifiers that could place an individual in a particular location, project or operation.

Note: Remains under EPI Moratorium until DOE lifts the hold.

- Item 030 – Time and Attendance Source and Input Records– Records that do not contain work locations (Contractor)

A new DOE records disposition schedule item was created that consolidates two (2) GRS schedules in part utilizing the GRS 2.4, item 030 authority, which allows for longer retention. Retention was increased to 10 years, as these are needed to support the Office of Inspector General's (OIG) mission of preventing fraud, waste and abuse in DOE programs and operations. The time and attendance source and input records have been split between items 020, 025, and 030, with item 030 covering records that do not contain work locations for specific days/times, charge codes or other identifiers that could place an individual in a particular location, project, or operation.

Note: Remains under EPI Moratorium until DOE lifts the hold.

- Item 100 – Workers Compensation (Personal Injury Compensation) Records

Two (2) records disposition schedule items were consolidated into one (1) schedule item, with an increased retention of 250 years to support various departmental Health and Safety Programs. This schedule item is a deviation to GRS 2.4, items 100 and 101. Previously:

- ADM 1.31 (in part)
- N1-434-92-4, item 26 (Las Vegas Contractor Schedule 1) (in part)

Note: Remains under EPI Moratorium until DOE lifts the hold.

- Item 110 – Unemployment Compensation Records

Updated schedule language. Previously:

- ADM 1.54

- Item 120 – Employee Tuition Assistance Program

Updated schedule language and retention to reflect the contract retention of 6 years. Previously:

- ADM 1.46

- Item 130 – Health Compensation Program Claims Files

Updated retention to 250 years to support various departmental Health and Safety Program. Previously:

- DAA-0434-2013-0001-0001

Note: Claim case files on individuals are maintained by the organization that is responsible for submitting the claim to the EEOICPA Office through either the Secure Electronic Records Transfer (SERT) system or another means.

- Item 140 – Health Compensation Program Working Files

Updated schedule language. Previously:

- DAA-0434-2013-0001-0002

- Item 150 – Health Compensation Program Control Files

Updated schedule language. Previously:

- DAA-0434-2013-0001-0003

- Item 160 – Health Compensation Program Administrative Files

Updated schedule language. Previously:

- DAA-0434-2013-0001-0004

- Item 170 – Secure Electronic Records Transfer (SERT) – claims data used to review and process claims

Updated schedule language. The documentation on the SERT system is scheduled under GRS 3.1, Item 011. Previously:

- DAA-0434-2017-0003-0001

- Item 180 – Secure Electronic Records Transfer (SERT) – claims support files

Updated schedule language. The documentation on the SERT system is scheduled under GRS 3.1, Item 011. Previously:

- DAA-0434-2017-0003-0002

4. Items Cross-Walked to GRS 2.4:

- Item 010 – Records used to calculate payroll, arrange paycheck deposit, and change previously issued paychecks

One (1) DOE records disposition schedule item crosswalk to GRS 2.4, item 010. Previously:

- ADM 2.18

- Item 080 – Wage Survey Files

Two (2) DOE records disposition schedule items crosswalk to GRS 2.4, item 080.

Previously:

- ADM 1.51
- N1-434-92-4, item 8

- Item 111 – Request for health benefits under spouse equity – denied applications

Two (2) DOE records disposition schedule items crosswalk to GRS 2.4, item 111, with a shorter retention. Based on information obtained from the Office of Personnel Managements (OPM) website regarding the Spouse Equity Act, it was determined that there was not a need or requirement for DOE to maintain these records longer than the retention under the GRS. Previously:

- ADM1.35a
- ADM1.35b(2)

- Item 140 – Family Medical Leave Act Program Administrative Files

One (1) DOE records disposition schedule item crosswalks to GRS 2.4, item 140. Previously:

- ADM 1.56

- Item 141 – Family Medical Leave Act Program Individual Case Files

One (1) DOE records disposition schedule item crosswalks to GRS 2.4, item 141. Previously:

- ADM 1.57

5. What updates has DOE made to the GRS?

Update August 2026: DOE has removed the retention instructions “but longer retention is authorized is required for business use,” as DOE does not authorize longer retention. You must follow the retention listed.

- Item 030 – Time and attendance records

The item has been struck out from the GRS with a note to utilize DOE 2.4, items 020, 025 or 030.

- Item 035 – Phased-retirement employees’ overtime documentation

Added (Federal Only) to the title.

- Item 040 – Agency payroll record for each pay period

This item has been struck out from the GRS with a note to utilize DOE 2.4, item 010 for Employee Payroll records for each pay period.

- Item 090 – Incentive package records

Federal Only was added to the title. A note was also added to utilize DOE 2.2, item 030 “Contractor Employee Personnel Files” for contractor employment agreements, recruitment, relocation and retention incentives.

- Item 100 and 101- Workers’ Compensation (personal injury compensation) records

These items have been struck out from the GRS with a note to utilize DOE 2.4, item 100 for Workers Compensation (personal injury compensation) records and DOE 2.7, item 110 for Individual Employee Occupational Illness/Injury Case File.

- Items 110 and 111 – Requests for health benefits under spouse equity

Added Federal Only to the title.

6. Why are you removing items that were in the old DOE Administrative Schedule?

The following item is being rescinded:

- N1-434-92-4, item 29 (Las Vegas Contractor Schedule 1)