

DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF FACILITY SERVICES
LICENSURE AND CERTIFICATION SECTION

Records Retention and Disposition Schedule

The Records Retention and Disposition Schedule and retention periods governing the records series listed herein are hereby approved. In accordance with the provisions of Chapters 121 and 132 of the General Statutes of North Carolina, it is agreed that the records of the

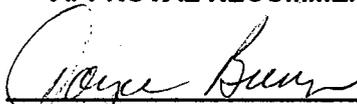
LICENSURE AND CERTIFICATION SECTION

do not and will not have further official use or value for administrative, research, or reference purposes after the respective retention periods specified herein. The N.C. Department of Cultural Resources consents to the destruction or other disposition of these records in accordance with the retention and disposition instructions specified in this schedule. However, records subject to audit or those legally required for ongoing official proceedings must be retained until released from such audits or official proceedings, notwithstanding the instructions of this schedule. **Public records including machine readable records not listed in this schedule are not authorized to be destroyed.** The

LICENSURE AND CERTIFICATION SECTION

agrees to destroy, transfer or dispose of records in the manner and at the times specified herein. This schedule is to remain in effect until superseded.

APPROVAL RECOMMENDED



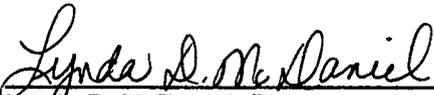
Joyce Bunn, Chief Records Officer
Department of Health and Human Services



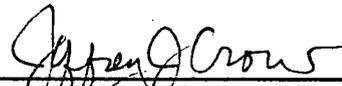
Stephen J. White, Chief
Licensure and Certification Section



Paul Pennell, Business Officer and Records Officer
Division of Facility Services



Lynda D. McDaniel, Director
Division of Facility Services



Jeffrey S. Crow, Director
Division of Archives and History

APPROVED



H. David Bruton, MD., Secretary
Department of Health and Human Services



Betty Ray McCain, Secretary
Department of Cultural Resources

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DIVISION OF FACILITY SERVICES
LICENSURE AND CERTIFICATION SECTION

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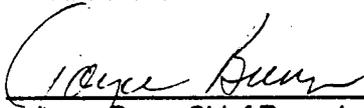
LICENSURE AND CERTIFICATION SECTION

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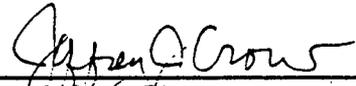
APPROVAL RECOMMENDED


Joyce Bunn, Chief Records Officer
Department of Health and Human Services


Stephen J. White, Chief
Licensure and Certification Section

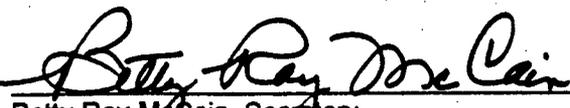

Paul Pennell, Business Officer and Records Officer
Division of Facility Services


Lynda D. McDaniel, Director
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Division of Archives and History

APPROVED


H. David Bruton, MD., Secretary
Department of Health and Human Services


Betty Ray McCain, Secretary
Department of Cultural Resources

This schedule was modified to
comply with the provisions of the
General Schedule for State Agency Records,
effective October 1, 2000
Remaining items retain the
original date shown below.

October 31, 1997

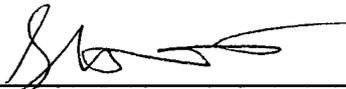
KLS

RECORDS RETENTION AND DISPOSITION SCHEDULE AMENDMENT

DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF FACILITY SERVICES
LICENSURE AND CERTIFICATION SECTION

Amend the records retention and disposition schedule approved October 31, 1997 by changing the description and disposition instructions for Items 1734 and 40333 as shown on substitute pages dated August 30, 2000.

APPROVAL RECOMMENDED



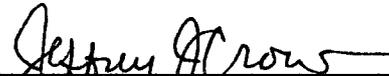
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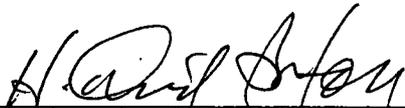


Lynda D. McDaniel, Director
Division of Facility Services



Jeffrey J. Crow, Director
Division of Archives and History

APPROVED



H. David Bruton, MD, Secretary
Department of Health and Human Services



Betty Ray McCain, Secretary
Department of Cultural Resources

August 30, 2000

KLS

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION**

ITEM 1730. LICENSED NURSING HOMES FILE.

Records concerning licensed nursing homes. File includes license applications, licenses, inspection reports, Form DFS-8001CN (certificate of need), waivers, correspondence, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 1731. CLOSED NURSING HOMES FILE.

Records concerning nursing homes which have closed or have changed ownership. File includes license applications, inspection reports, correspondence, letters of intent to close with closing date, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 1732. LICENSED HOSPITALS FILE.

Records concerning licensed hospitals. File includes applications, licenses, Form DFS-8001CN (certificate of need), waivers, and correspondence relating to licensing of hospitals.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 1733. CLOSED HOSPITALS FILE.

Records concerning hospitals which have closed or have changed ownership. File includes applications, forms, correspondence, letters of intent to close with closing date, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION**

ITEM 1734. FACILITY LICENSURE/CERTIFICATION/COMPLAINTS INVESTIGATION FILE.

Forms, survey reports, inspection of care reports, and related correspondence used in licensing and certifying health care providers as meeting state licensing requirements and federal standards. Health care providers include nursing homes (skilled nursing and intermediate care), ambulatory surgical centers, portable x-ray facilities, hospitals (general acute care, and speciality), rural health clinics, outpatient rehabilitation facilities, independent laboratories (mammography and HIV screening), chronic renal disease facilities, home care agencies (home health), hospices, and nursing pools. File also includes forms documenting surveyor notes, draft copies of survey report forms, and other workpapers generated as a part of the survey; and registered complaints, investigation notes and reports, medical information, recommendations for administrative action, statements of deficiencies, correspondence, and other related records concerning complaints investigation. (Comply with Chapter 42, 401.126 of the Code of Federal Regulations (CFR) regarding confidentiality of health status of individual medicaid recipients.) Amended 8-30-00

DISPOSITION INSTRUCTIONS: Transfer completed survey and investigative file to the State Records Center after 2 years or after the 2 most recent surveys for certified facilities if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, transfer to the State Records Center after completion of action and resolution of issues involved. Records will be held in the State Records Center 3 additional years and then destroyed. Destroy in office medical information, drafts of report forms, workpapers, notes and all remaining records after final product prepared. Destroy records currently stored in the State Records Center 3 years from date received. Records for intermediate care facilities for the mentally retarded and psychiatric hospitals transferred to Division of Facility Services, Mental Health Licensure and Certification Section.

ITEM 3994. CONFIDENTIAL ON-SITE MEDICAID FACILITIES REVIEW FILE.

Confidential records concerning reviews of Medicaid facilities throughout the state. File includes reports, correspondence, confidential listings of individual Medicaid recipients, confidential information concerning the health status of individual Medicaid recipients, and other related records maintained in accordance with Chapter 42, Paragraph 431.17 of the CODE OF FEDERAL REGULATIONS (CFR). (Records are considered confidential in accordance with Chapter 42 431.300-.307 of the CODE OF FEDERAL REGULATIONS.)

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734).

ITEM 7646. CONFERENCES, COMMITTEES, AND ASSOCIATIONS FILE.

Reference copies of correspondence, reports, agendas, and related information concerning conferences, committees, and associations to which administrators of the agency belong and participate.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7647. LICENSURE SECTION FILE.

Correspondence and memorandums concerning the administration of the Licensure Section.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7648. ANNUAL REPORTS FILE.

Management by Objective reports and Annual Productivity reports concerning all programs within the Licensure Section.

DISPOSITION INSTRUCTIONS: Records transferred to Quarterly Showing Reports File (Item 7778).

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION**

ITEM 7649. PERSONNEL FILE.

Personnel forms and correspondence relative to personnel actions involving section staff. (Comply with provisions of G.S. 126-22, 126-23, and 126-24 regarding confidentiality of personnel records.)

DISPOSITION INSTRUCTIONS: Records transferred to Personnel File (Item 7781).

ITEM 7650. REPORTS AND SURVEYS FILE.

Reference reports and surveys concerning health facility care prepared by other agencies. File includes Joint Commission on Accreditation of Hospitals Survey, Washington Report, Hospital Week, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Reference File (Item 7789).

ITEM 7651. DIRECTIVES AND MEMORANDUMS FILE.

Reference directives and memorandums from the Department of Human Resources, Division of Facility Services, and Director's Office.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7652. HOME HEALTH SERVICES DIRECTIVES FILE.

Reference directives or policy statements in the form of letters and transmittals.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7653. ADMINISTRATIVE FILE.

Vehicle logs, time schedules, administrative sanctions, general information, correspondence, and policies and procedures concerning licensure/certification programs.

DISPOSITION INSTRUCTIONS: Policies and Procedures records transferred to Policies and Procedures File (Item 7783). Remaining records transferred to Administrative File (Item 7779).

ITEM 7654. STANDARDS AND LICENSURE AND CERTIFICATION FILE.

Reference information concerning federal and state standards used in the licensure and certification of health care facilities.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7655. TRAINING FILE.

Reference memorandums and information concerning staff training sessions. File includes quarterly reports on staff participation in Home Health Services sponsored activities.

DISPOSITION INSTRUCTIONS: Records transferred to Conferences and Workshop File (Item 7785).

ITEM 7657. LEGISLATIVE FILE.

Reference information concerning proposed and enacted legislation. File includes lists of members of the General Assembly, correspondence, and position statements on retention of licensure programs.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7658. BUDGET FILE.

Budget proposals and correspondence concerning the operating budget for the state health care facility licensure program. File includes computer printouts from the Comptroller's Office which detail expenditure activities under the state approved budget and expansion budget requests for state funds.

DISPOSITION INSTRUCTIONS: Records transferred to Budget File (Item 7787).

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION**

ITEM 7659. ATTORNEY GENERAL FILE.

Reference information concerning licensure of health care facilities.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7660. OFFICE ADMINISTRATION FILE.

Records and materials created and accumulated in the performance of routine tasks and in the administration of secondary office programs and responsibilities.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7661. HOME HEALTH AGENCY LICENSURE FILE.

Records concerning licensed home health agencies. File includes license applications, licenses, inspection reports, and all related correspondence.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7662. CLOSED HOME HEALTH AGENCY FILE.

Records concerning home health agencies which have closed or have changed ownership. File includes license applications, licenses, inspection reports, correspondence, letters of intent to close with closing date, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7663. CLOSED HOSPICE FILE.

Records concerning hospices which have closed or have changed ownership. File includes license applications, licenses, inspection reports, correspondence, letters of intent to close with closing date, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7664. CLOSED CARDIAC REHABILITATION PROGRAMS FILE.

Records concerning cardiac rehabilitation facilities and programs which have closed or have changed ownership. File includes certification applications, certificates, renewal forms, inspection reports, correspondence, letters of intent to close with closing date, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7665. ABORTION CLINICS CERTIFICATION FILE.

Records concerning certified abortion clinics. File includes certification applications, certificates, renewal forms, inspection reports, and all related correspondence.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION**

ITEM 7666. CLOSED ABORTION CLINICS FILE.

Records concerning abortion clinics which have closed or have changed ownership. File includes certification applications, certificates, renewal forms, inspection reports, correspondence, letters of intent to close with closing date, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7672. CARDIAC REHABILITATION PROGRAM CERTIFICATION FILE.

Records concerning licensed cardiac rehabilitation plan participants. File includes certification applications, certificates, renewal forms, inspection reports, and all related correspondence.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7674. FACILITY CERTIFICATION INDEX CARDS FILE.

Index cards listing names of health care providers. Cards also list dates of certification, inspection dates, expiration dates, and other related data.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

ITEM 7678. LICENSED HOSPICE FILE.

Records concerning licensed hospices and facilities operated pursuant to the hospice program licensure rules. File includes license applications, licenses, inspection reports, and all related correspondence.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7679. COMPLAINT INVESTIGATIONS FILE.

Records concerning licensed and certified facilities and providers of health care. File includes registered complaints, investigation notes and reports, medical information, recommendations for action, statements of deficiencies, correspondence, and other related records. (Comply with provisions of G.S. 131E-105 regarding confidentiality of investigative records and G.S. 4801.B.1.b. regarding federal investigations.) (Records transferred from Health Care Facilities Branch.)

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734).

ITEM 7710. LICENSED AMBULATORY SURGICAL FACILITY FILE.

Records concerning licensed ambulatory surgical facilities. File includes license applications, licenses, inspection reports, and all related correspondence.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION**

ITEM 7712. CLOSED AMBULATORY SURGICAL FACILITY FILE.

Records concerning ambulatory surgical facilities which have closed or have changed ownership. File includes license applications, licenses, inspection reports, correspondence, letters of intent to close with the closing date, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734). Destroy records currently stored in the State Records Center 3 years from date received.

ITEM 7776. NON-CONFIDENTIAL ON-SITE MEDICAID FACILITIES REVIEW FILE.

Non-confidential records concerning on-site reviews of Medicaid facilities throughout the state. File includes reports, correspondence, certification and licensure information, and other related records. (File contains only information that is subject to public disclosure.)

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734).

ITEM 7778. QUARTERLY SHOWING REPORTS FILE.

Reports concerning periodic activities of each Medicaid facility in the state. Reports includes facility's current address, certification status changes, dates of reviews, dates of agreements, and other related data.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

ITEM 7779. ADMINISTRATIVE FILE.

Records concerning office administration and resources. File includes reference copies of publications, legislative inquiries, opinions from the Attorney General, memorandums, correspondence, directives, guidelines, minutes of committees and associations, news media reports, vehicle use reports, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office directives when superseded or obsolete. Destroy in office remaining records when reference value ends.

ITEM 7780. CORRESPONDENCE FILE.

Official office correspondence.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7786. ANNUAL REPORTS FILE.

Reference copies of annual reports.

DISPOSITION INSTRUCTIONS: Records transferred to Quarterly Showing Reports File (Item 7778).

ITEM 7789. REFERENCE FILE.

Reference copies of records concerning subjects pertinent to or of interest to the office. File includes publications, reports, directives and guidelines, news articles, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Administrative File (Item 7779).

ITEM 7790. SURPLUS PROPERTY FILE.

Records concerning surplus property and its disposition. File includes inventories, records of disposal, accounting information, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Supplies and Equipment File (Item 7788).

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION**

ITEM 7792. POSITION DESCRIPTIONS FILE.

Job descriptions for each position.

DISPOSITION INSTRUCTIONS: Records transferred to Personnel File (Item 7781).

ITEM 7793. OVERTIME FILE.

Records concerning overtime by office personnel.

DISPOSITION INSTRUCTIONS: Records transferred to Leave Records File (Item 7782).

ITEM 9648. LEAVE FILE.

Records concerning leave by office personnel.

DISPOSITION INSTRUCTIONS: Records transferred to Leave Records File (Item 7782).

ITEM 32864. HUMAN IMMUNE VIRUS (HIV) LABORATORIES FILE.

Records concerning HIV laboratories. File includes letters, certificates, correspondence, and other related records.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734).

ITEM 32987. NURSING POOL LICENSURE FILE.

Machine-readable and paper records of applications for licensure as a Nursing Pool. File includes abbreviated copy of written administrative and personnel policies, certificate of insurance, and correspondence between the division and the agency applying for licensure.

DISPOSITION INSTRUCTIONS: Records transferred to Facility Licensure/Certification/Complaints Investigation File (Item 1734).

ITEM 40329. INFORMAL DISPUTE RESOLUTIONS FILE.

Records concerning disputed deficiencies on surveys and complaint investigations. File includes reference copies of deficiencies cited and plans of correction, documentation from facilities supporting dispute of deficiencies, correspondence coordinating the informal dispute resolution process, data and reports reflecting informal dispute resolution activity, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year(s) if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

ITEM 40330. LONG TERM CARE REMEDY REVIEW FILE.

Records concerning review of deficiencies cited by surveys and investigations of long term care facilities, and recommendations for changes. File includes draft copies of cited deficiencies and worksheet recommendations.

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year(s) if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy in office after completion of action and resolution of issues involved.

ITEM 40332. STATE AGENCY QUALITY IMPROVEMENT PROGRAM (SAQIP) FILE.

Records concerning promotion of quality and ongoing improvement in survey and certification activities through the development and use of quality improvement plans. File includes core performance standards and individual quality improvement plans for branches within the section, quarterly status reports, correspondence coordinating the program, and other related records.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

**DEPARTMENT OF HEALTH AND HUMAN SERVICES
DIVISION OF HEALTH SERVICE REGULATION
LICENSURE AND CERTIFICATION SECTION
REGIONAL OFFICE OPERATIONS**

ITEM 40333. FACILITY LICENSURE/CERTIFICATION/COMPLAINTS INVESTIGATION FILE.

Forms, survey reports, inspection of care reports, and related correspondence used in licensing and certifying health care providers as meeting state licensing requirements and federal standards. Health care providers include nursing homes (skilled nursing and intermediate care), ambulatory surgical centers, portable x-ray facilities, hospitals (general acute care, and specialty), rural health clinics, outpatient rehabilitation facilities, independent laboratories (mammography and HIV screening), chronic renal disease facilities, home care agencies (home health), hospices, and nursing pools. File also includes forms documenting surveyor notes, draft copies of survey report forms, and other workpapers generated as a part of the survey; and registered complaints, investigation notes and reports, medical information, recommendations for administrative action, statements of deficiencies, correspondence, and other related records concerning complaints investigations. (Comply with Chapter 42, 401.126 of the Code of Federal Regulations (CFR) concerning the confidentiality of health status of individual Medicaid recipients.) Amended 8-30-00

DISPOSITION INSTRUCTIONS: Transfer completed survey and investigative file to Licensure and Certification Section, Facility Licensure/Certification/Complaints Investigation File (Item 1734) after survey and investigation are completed. Destroy in office medical information, drafts of report forms, workpapers and notes after final product prepared. Destroy in office remaining records after 2 years or after the 2 most recent surveys for certified facilities if no litigation, claim, audit, or other official action involving the records has been initiated. If official action has been initiated, destroy after completion of action and resolution of issues involved. Records for intermediate care facilities for the mentally retarded and psychiatric hospitals transferred to Division of Facility Services, Mental Health Licensure and Certification Section.

ITEM 40334. OFFICE ADMINISTRATION FILE.

Correspondence concerning the administrative functions of the office and used in the completing of routine tasks and secondary office programs and responsibilities. File also includes reference copies of department, division, and/or section guidelines, and policy and procedures.

DISPOSITION INSTRUCTIONS: Destroy in office when administrative value ends.