

DEPARTMENT OF ADMINISTRATION

PROGRAM RECORDS RETENTION AND DISPOSITION SCHEDULE

The Program 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

**DEPARTMENT OF ADMINISTRATION
MOTOR FLEET MANAGEMENT DIVISION**

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 Department of Natural and Cultural Resources consents to the destruction or other disposition of these records in accordance with the retention and disposition instructions specified in this schedule. The agency agrees to comply with 07 NCAC 04M .0510 when deciding on a method of destruction. Electronic records will be destroyed so that the data and metadata are overwritten, deleted, or unlinked in such a way that the records may not be practicably reconstructed. Confidential records will be destroyed in such a manner that the records cannot be practicably read or reconstructed. 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.

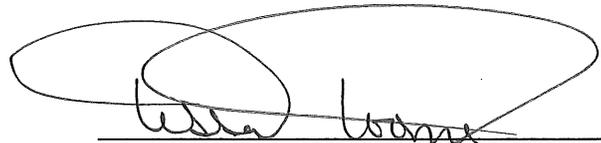
The Department of Administration and the Department of Natural and Cultural Resources agree that certain records series possess only brief administrative, fiscal, legal, research, and reference value. These records series have been designated by retention periods which allow them to be destroyed when "*administrative/reference value ends.*" The Department of Administration hereby agrees that it will establish and enforce internal policies setting minimum retention periods for records with this disposition instruction. Without the establishment of internal policies, the agency is not authorized by the Department of Natural and Cultural Resources to destroy these records. For those record series scheduled to be microfilmed, the Department of Administration will be responsible for cost of microfilm production.

The Department of Administration and the Department of Natural and Cultural Resources concur that the long-term and/or permanent preservation of electronic records requires additional commitment and active management by the agency. The Department of Administration agrees to comply with all policies, standards, and best practices published by the Department of Natural and Cultural Resources regarding the creation and management of electronic records and to make electronic records accessible for the period of time prescribed in this schedule. Where the method of recording information changes (for example, to an electronic system), the retention periods governing the records listed herein still apply, provided the records document the same agency function.

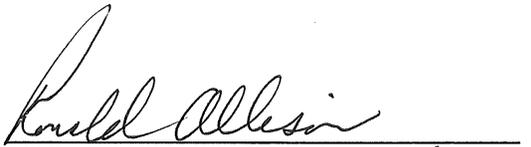
E-mail messages sent or received by Executive Branch agencies shall be retained for 5 years pursuant to Executive Order No. 12 (issued May 21, 2013 by Governor Pat McCrory). Any e-mail messages requiring retention longer than 5 years, including those with permanent historical value, shall be designated with specific retention periods in this schedule. Public records including electronic records not listed in this schedule or in the *General Schedule for State Agency Records* are not authorized to be destroyed.

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

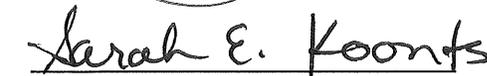
APPROVAL RECOMMENDED



Tessa Toomey, Chief Records Officer



Bill Buchanan, Director *Deputy Director*
Motor Fleet Management Division



Sarah E. Koontz, Director
Division of Archives and Records

APPROVED



Kathryn L. Johnston, Acting Secretary
Department of Administration



Susan W. Kluttz, Secretary
Department of Natural and Cultural
Resources



DEPARTMENT OF ADMINISTRATION MOTOR FLEET MANAGEMENT DIVISION

ITEM 10777. GARAGE OPERATIONS FILE

Records, in paper and electronic formats, including e-mail, concerning organization and operation of the garage. File includes accident investigations, vehicle inventories, repair authorizations, correspondence (including e-mail), and other related records. Relevant data is entered into Motor Fleet Management System database.

DISPOSITION INSTRUCTIONS: Scan records in office. Destroy in office paper copies of scanned records after all quality control procedures have been completed. Destroy in office electronic records after 3 years. Purge relevant data fields in Motor Fleet Management System 3 years from date of entry.

ITEM 10784. NEW CAR CHECK-IN FILE

Records, in paper and electronic formats, including e-mail, concerning newly acquired vehicles. File includes models, colors, engine sizes, license numbers, accessories, and other records. Relevant data is entered into Motor Fleet Management System database.

DISPOSITION INSTRUCTIONS: Destroy in office after disposal of vehicle. Purge relevant data fields in Motor Fleet Management System after disposal of vehicle.

ITEM 10787. DRIVER CITATION FILE

Records, in paper and electronic formats, including e-mail, concerning the issuance of minor traffic citations and other fees to drivers of state-owned vehicles. File includes minor traffic citations, red-light camera citations, parking citations, letters of notifications to drivers, verification forms, charges for tolls, misuse complaints (form FM-25), agency responses, and other related records. Relevant data is entered into Motor Fleet Management System database.

DISPOSITION INSTRUCTIONS: Scan records in office. Destroy in office paper copies of FM-25 and agency responses after 2 years. Destroy in office paper copies of remaining scanned records after all quality control procedures have been completed. Destroy in office electronic records after 2 years. Purge relevant data fields in Motor Fleet Management System 2 years from date of entry.

ITEM 10794. PERMANENTLY-ASSIGNED VEHICLES FILE

Records, in paper and electronic formats, including e-mail, concerning vehicles permanently assigned to state agencies and individuals. File includes listing of all vehicles permanently assigned to state agencies and individuals, including vehicle identification numbers, license numbers, models, years, and locations of assigned vehicles. File also includes state agency and individual applications for permanent assignments of vehicles (Form FM-30); justifications for requests; agency travel logs with trip dates, places of travel, odometer readings, and amounts of mileage charges; correspondence (including e-mail); and other related records. Relevant data is entered into Motor Fleet Management System database.

DISPOSITION INSTRUCTIONS: Scan records in office. Destroy in office paper copies of FM-30 forms after disposal of vehicle. Destroy in office paper copies of remaining scanned records after all quality control procedures have been completed. Destroy in office electronic records after disposal of vehicle. Purge agency travel log data fields in Motor Fleet Management System after 4 years and when released from all audits. Purge all other relevant data fields in Motor Fleet Management System after disposal of vehicle.

ITEM 10797. COMMUTING STATUS FILE

DEPARTMENT OF ADMINISTRATION MOTOR FLEET MANAGEMENT DIVISION

Records, in paper and electronic formats, including e-mail, concerning certification of commuting status for individuals with permanently-assigned vehicles. Commuting status may be exempt, non-exempt (individuals that are required to reimburse the state for mileage), non-commuting (individuals who are assigned a vehicle during the day, but must park vehicle at their work station upon completion of the business day, and are exempt from payment of a fee for usage of vehicle), and office-in-home. File includes individual applications for permanent assignments of vehicles with justifications of commuting status (Form FM-30) and other related records. File also includes forms and appeals notices submitted by individuals with permanently-assigned vehicles requesting that they be exempted from paying commuting charges. Relevant data is entered into Motor Fleet Management System database. (Comply with applicable provisions of G.S. § 132-1.10(b)(5) regarding confidentiality of personal identifying information.)

DISPOSITION INSTRUCTIONS: Scan records in office. Destroy in office paper copies of FM-30 forms 2 years after an individual is no longer assigned a permanent vehicle or after commuting status changes. Destroy in office paper copies of remaining scanned records after all quality control procedures have been completed. Destroy in office electronic records 2 years after an individual is no longer assigned a permanent vehicle or after commuting status changes. Purge relevant data fields in Motor Fleet Management System 2 years after an individual is no longer assigned a permanent vehicle or after commuting status changes.

ITEM 10802. WORK ASSIGNMENT AND PERPETUAL INVENTORY FILE

Records, in paper and electronic formats, including e-mail, concerning repair orders used to document repairs performed on state-owned vehicles. File includes work assignments, vehicle repair costs, and other related records. Relevant data is entered into Motor Fleet Management System database.

DISPOSITION INSTRUCTIONS: Scan records in office. Destroy in office paper copies of scanned records after all quality control procedures have been completed. Destroy in office electronic records 1 year after disposal of vehicle. Purge relevant data fields in Motor Fleet Management System 1 year after disposal of vehicle.

ITEM 10808. MONTHLY VEHICLE INSPECTION FILE

Records in paper and electronic formats, including e-mail, concerning monthly inspections of state-owned vehicles by the division. File includes correspondence (including e-mail). Relevant data is entered into Motor Fleet Management System database.

DISPOSITION INSTRUCTIONS: Scan records in office. Destroy in office paper copies of scanned records after all quality control procedures have been completed. Destroy in office electronic records after 1 year. Purge relevant data fields in Motor Fleet Management System 1 year from date of entry.

ITEM 50607. MOTOR POOL FILE

Records, in paper and electronic formats, including e-mail, concerning motor pool vehicle requests. File includes listing of all vehicles assigned to motor pool, including vehicle identification numbers, license numbers, models, years, and locations of assigned vehicles; state agency and individual applications for motor pool vehicles (Form FM-2); travel logs with drivers' information, trip dates, places of travel, odometer readings, and mileage; correspondence (including e-mail); and other related records. Relevant data is entered into Motor Fleet Management System database. (Comply with applicable provisions of G.S. § 132-1.10(b)(5) regarding confidentiality of personal identifying information.) (Motor pool closed on January 15, 2016.)

**DEPARTMENT OF ADMINISTRATION
MOTOR FLEET MANAGEMENT DIVISION**

DISPOSITION INSTRUCTIONS: Transfer listing of all vehicles to Permanently-Assigned Vehicles File (Item 10794). Destroy in office remaining records on July 15, 2016. Purge relevant data fields in Motor Fleet Management System on July 15, 2016.

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FOLLOWING RECORDS SERIES ARE EITHER
DISCONTINUED OR TRANSFERRED.**

ITEM 10776. ADMINISTRATOR'S MASTER FILE

Correspondence, budget statements, pertinent legislation records, staff meeting minutes, surveys, and other related administrative records.

DISPOSITION INSTRUCTIONS: Item discontinued. Superseded by the General Schedule for State Agency Records.

ITEM 10778. MANAGEMENT INFORMATION SYSTEM MASTER FILE

Reference information concerning the operation of the Management Information System (MIS) Section. File includes billing procedures, reports, computer printouts, and related correspondence.

DISPOSITION INSTRUCTIONS: Item discontinued. All records destroyed.

ITEM 10781. DIVISION MASTER COMPUTER FILE

Computer tapes documenting all vehicles operating under the jurisdiction of the Department of Administration. File includes vehicles assignments, operating costs, purchases, billing information, and other related data.

DISPOSITION INSTRUCTIONS: Item discontinued. All records destroyed.

ITEM 10782. PERMANENTLY-ASSIGNED VEHICLE TRAVEL LOG FILE

Log sheets (white copy) used to denote trip dates, places of travel, odometer readings, and amounts of mileage charges.

DISPOSITION INSTRUCTIONS: Item discontinued. Function and records transferred to Permanently-Assigned Vehicles File (Item 10794).

ITEM 10785. PERMANENTLY-ASSIGNED VEHICLES RECEIPT FILE

Reference information (pink copy) of material used to denote permanent-assigned vehicles to state agencies. File includes related correspondence.

DISPOSITION INSTRUCTIONS: Item discontinued. Function and records transferred to Permanently-Assigned Vehicles File (Item 10794).

**DEPARTMENT OF ADMINISTRATION
MOTOR FLEET MANAGEMENT DIVISION**

ITEM 10796. NON-EXEMPT COMMUTING FILE

Records concerning individuals with permanently-assigned vehicles that are required to pay a commuting fee.

DISPOSITION INSTRUCTIONS: Item discontinued. Function and records transferred to Commuting Status File (Item 10797).

ITEM 10798. NON-COMMUTING FILE

Records used to certify individuals who are assigned a vehicle during the day but must park vehicle at their work station upon completion of the business day. (These individuals are exempt from payment of a fee for the use of the vehicle.)

DISPOSITION INSTRUCTIONS: Item discontinued. Function and records transferred to Commuting Status File (Item 10797).

ITEM 10799. APPEALS FILE

Forms and appeal notices submitted by individuals with permanently-assigned vehicles to the division requesting that they be exempted from paying commuting charges.

DISPOSITION INSTRUCTIONS: Item discontinued. Function and records transferred to Commuting Status File (Item 10797).

ITEM 10805. REQUESTS FOR PERMANENTLY-ASSIGNED VEHICLE FILE

Requests by individuals for a permanently-assigned state vehicle. File includes justifications for requests and the identification number of the vehicle.

DISPOSITION INSTRUCTIONS: Item discontinued. Function and records transferred to Permanently-Assigned Vehicles File (Item 10794).