

DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF

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

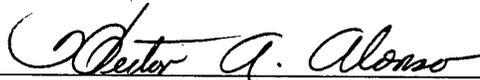
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF

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

NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF

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 This schedule is to remain in effect until superseded.

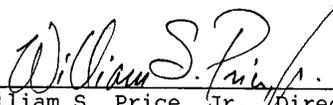
APPROVAL RECOMMENDED



Hector A. Alonso, Chief Records Officer
Department of Economic and Community Development

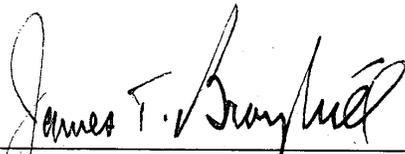


Robert Gruber, Executive Director
North Carolina Utilities Commission
Public Staff

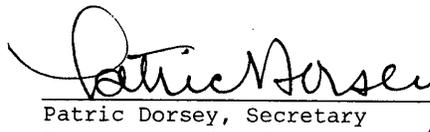


William S. Price, Jr., Director
Division of Archives and History

APPROVED



James T. Broyhill, Secretary
Department of Economic and Community
Development



Patric Dorsey, Secretary
Department of Cultural Resources

June 29, 1990

WCW

DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF

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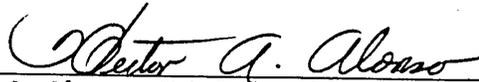
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF

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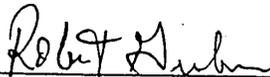
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF

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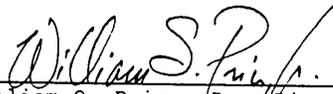
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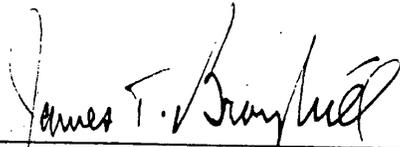


Robert Gruber, Executive Director
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This schedule was modified to
comply with the provisions of the
General Schedule for State Agency Records,
effective October 1, 2000
Remaining items retain the
original date shown below.

June 29, 1990

WCW

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
ACCOUNTING DIVISION**

ITEM 579. UTILITY COMPANIES ANNUAL REPORTS FILE.

Record copies of annual reports and statistical data concerning utility companies. File includes financial and accounting data, plant operating authorization, annual stockholders report, and employment and personnel data.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center after 5 year(s). Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

ITEM 12878. MINUTES AND AGENDAS FILE.

Reference copies of minutes and agendas for weekly staff conference.

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year.

ITEM 12879. MANAGEMENT PERFORMANCE AUDITS FILE.

Record copies of reports and correspondence relating to management and performance audits directed by the commission.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12880. OUT-OF-STATE POWER COMPANY ANNUAL REPORTS FILE.

Record copies of annual reports of companies outside of North Carolina used for comparison study purposes.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12882. ANNUAL REPORT RECORDS CARD FILE.

Record copies of card files concerning current and out-of-business utilities. File includes names, addresses, telephone numbers, date annual report forwarded, and date received.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12884. FEDERAL ENERGY REGULATORY COMMISSION (FERC) ORDERS FILE.

Record copies of orders issued by the FERC.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12885. ORIGINAL TESTIMONY FILE.

Record copy of Accounting Division's testimony.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12886. GENERAL ORDERS (100 SERIES) FILE.

Reference copies of series 100 orders, testimonies, exhibits, work papers, company applications, law briefs, and transcripts.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12887. GENERAL RATE CASE FILE.

Reference copies of testimonies, exhibits, orders, work papers, company applications, law briefs, and transcripts for all utility companies.

DISPOSITION INSTRUCTIONS: Destroy in office after 5 years.

ITEM 12888. ELECTRIC COMPANIES' FUEL CLAUSE FILE.

Reference copies of company applications, testimonies, exhibits, orders, and work papers.

DISPOSITION INSTRUCTIONS: Destroy in office when administrative and reference values end.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
COMMUNICATIONS DIVISION**

ITEM 12830. DOCKETS FILE.

Reference copies of records concerning rate cases, complaints, commission orders, documentary changes, Federal Communications Commission applications, and radio common carrier annual reports.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center when administrative value ends. Records will be held for agency in the State Records Center 5 additional years and then destroyed.

ITEM 12831. TARIFFS AND EXCHANGE SERVICE AREA MAPS FILE.

Local exchange tariff rates and exchange service area maps.

DISPOSITION INSTRUCTIONS: Destroy in office when superseded or obsolete.

ITEM 12833. STATION DEVELOPMENT REPORTS FILE.

Monthly statistical reports. File includes records concerning the number of stations, extensions, and party lines each month.

DISPOSITION INSTRUCTIONS: Destroy in office December reports after 10 years. Destroy in office remaining reports after 1 year.

ITEM 12834. TECHNICAL BROCHURES AND COST STUDIES FILE.

Proprietary records concerning pricing of equipment. File includes brochures outlining equipment specifications and descriptions of equipment.

DISPOSITION INSTRUCTIONS: Destroy in office when administrative value ends.

ITEM 12835. COUNTY MAPS FILE.

Maps of each county within the state.

DISPOSITION INSTRUCTIONS: Destroy in office when administrative value ends.

ITEM 12836. ANNUAL REPORTS FILE.

Reports concerning regulated telephone companies. File includes financial operating statistics.

DISPOSITION INSTRUCTIONS: Destroy in office when administrative value ends.

ITEM 12837. HELD OVER, TROUBLE REPORT, AND OPERATOR ANSWER TIME FILE.

Summary reports concerning held orders, telephone troubles, and operator answer time.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 years.

ITEM 12838. NATIONAL ASSOCIATION OF REGULATORY UTILITY COMMISSION (NARUC) BULLETINS FILE.

Records concerning activities of NARUC within the United States.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

ITEM 12839. TELECOMMUNICATIONS REPORTS FILE.

Records concerning the telecommunications industry in the United States.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
ECONOMIC RESEARCH DIVISION**

ITEM 4059. FEDERAL GRANTS FILE.

Record copies of contracts (consultants and DOE), proposals, reimbursement vouchers, expense vouchers, correspondence and memorandums, progress reports, and letters.

DISPOSITION INSTRUCTIONS: Retain in office 1 year after contract expires, then transfer to the State Records Center. Records will be held for agency in the State Records Center 3 additional years and then destroyed.

ITEM 12858. RATE CASE FILE.

Reference copies of cost allocation studies, rate of return studies, residential service schedules, and testimonies of proceedings.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

ITEM 12859. DOCKET FILE.

Reference copies of orders, billings, complaints, financial records, stock and bonds (selling), extensions, and fuel clause adjustments.

DISPOSITION INSTRUCTIONS: Destroy in office 1 year after order is issued by the commission or higher court, if case is appealed.

ITEM 12860. ELECTRICITY LOAD DEMAND FORECAST FILE.

Record and reference copies of computer printouts forecasting electricity needs for the next year in North Carolina.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

ITEM 12861. SOUTH CAROLINA CLIMATOLOGICAL AND STATISTICAL DATA FILE.

Record copies of South Carolina's weather data and South Carolina's employment data for cities, counties, industries, governments, farms, and manufacturers.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center after 10 year(s). Records will be held for agency in the State Records Center 5 additional years and then destroyed.

ITEM 12862. UNITED STATES DEPARTMENT OF LABOR STATISTICAL FILE.

Record copies of Producer Price Index (PPI), Consumer Price Index (CPI), Wholesale Price Index (WPI), Employment Situation, Labor Force Developments, Unemployment (State and Metropolitan), and United States Import/Export Price Index.

DISPOSITION INSTRUCTIONS: Destroy in office after 15 years.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
ELECTRIC DIVISION**

ITEM 3444. SPECIAL STUDY-CP&L'S OPERATION AND MANAGEMENT OF BRUNSWICK NUCLEAR POWER PLANT FILE.

Official copies of work papers and documents concerning a special study conducted by the Public Staff looking into CP&L's operation of the Brunswick Nuclear Power Plant.

DISPOSITION INSTRUCTIONS: Item discontinued. Transfer to the State Records Center immediately. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

ITEM 12840. DOCKET FILE.

Reference copies of general rate case files. File includes applications to issue and sell securities, applications for certificates of public convenience and necessity, formal complaint dockets, special billing arrangement applications, revised rate schedule filings, power plant siting investigations, management performance audits, voltage range reduction test programs, examinations of operations, applications for lease agreements, and miscellaneous correspondence.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12841. COUNTY MAPS FILE.

Record copies of electric service maps for each county. Maps detail electric companies service for specific areas.

DISPOSITION INSTRUCTIONS: Transfer maps to chief clerk's office when revised.

ITEM 12842. SAFETY REPORTS AND FATALITY REPORTS FILE.

Record copies of safety and fatality reports generated by all companies reporting fatalities on their facilities. File includes information concerning contact with their facilities.

DISPOSITION INSTRUCTIONS: Destroy in office when legal value ends.

ITEM 12844. MONTHLY FINANCIAL AND OPERATING REPORTS FILE.

Reference copies of financial and operating monthly reports generated by Carolina Power and Light Company (CP&L), Duke Power, and Virginia Electric Power Company (VEPCO).

DISPOSITION INSTRUCTIONS: Destroy in office after 10 years but retain December reports until agency need ends.

ITEM 12845. ANNUAL REPORTS FILE.

Reference copies of annual reports generated by electrical power companies authorized to operate in North Carolina.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12847. EMERGENCY LOAD REDUCTION PLANS FILE.

Record copies of load reduction plans generated by CP&L, Duke Power, and VEPCO.

DISPOSITION INSTRUCTIONS: Destroy in office when new plans are filed or when agency need ends.

ITEM 12848. ELECTRIC RELIABILITY AND ENVIRONMENTAL INFORMATION FILE.

Record copies of reliability and environmental information concerning all electric companies.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12849. POWER SYSTEM STATEMENTS (FORM 12) FILE.

Record copies of statements by CP&L, Duke Power, and VEPCO.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
ELECTRIC DIVISION**

ITEM 12850. FUEL REPORTS FILE.

Reference copies of monthly fuel reports and fuel clause filings generated by CP&L, Duke Power, VEPCO, and Nantahala.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12852. MISCELLANEOUS INFORMATION FILE.

Reference copies of minutes and notes from various state, federal, or utility meetings, seminars, and courses. File includes public staff and commission special studies, various state, federal, and utility publications, brochures, and pamphlets concerning electric utility matters.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12853. DIVISION CORRESPONDENCE FILE.

Reference copies of correspondence transmitted out of the division.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

ITEM 12854. SMALL POWER PRODUCER FILE.

Record and reference copies of information concerning regulated utility which includes small power producers and co-generators. Files consist of copies of all applications, documents, and orders pertaining to small power producers.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
EXECUTIVE DIRECTOR'S OFFICE**

ITEM 12822. DIRECTOR'S FILE.

Record copies of correspondence and other materials created and collected by the Executive Director's Office.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center when agency need ends. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
LEGAL DIVISION**

ITEM 582. STAFF CONFERENCE RECORDS FILE.

Public Staff and commission conference agenda records. File includes or concerns minutes, orders, studies, and proposals recommended by the Public Staff to the Commission Staff concerning utilities matters.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center after 2 year(s). Records will be held for agency in the State Records Center 15 additional years and then transferred to the custody of the Archives.

ITEM 12827. LEGAL DIVISION CASE FILE.

Duplicate copies of case records used by the Legal Division attorneys as working files.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends.

ITEM 12828. LEGAL DIVISION ADMINISTRATIVE FILE.

Correspondence, interagency memorandums, conference minutes, and bulletins concerning utilities matters.

DISPOSITION INSTRUCTIONS: Destroy in office after 1 year.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
NATURAL GAS DIVISION**

ITEM 12892. ADMINISTRATIVE OFFICE FILE.

Record copies of general administrative correspondence. File includes minutes of staff conferences, travel reimbursement records forms, and personnel information generated by the Natural Gas Division.

DISPOSITION INSTRUCTIONS: Destroy in office travel records after 2 years. Destroy in office remaining records after 10 years.

ITEM 12893. FEDERAL DOCKET FILE.

Record copies of federal docket files containing applications, work papers, and orders. File includes publications, informational updates, and testimonies generated by the federal government and interstate pipeline supplier.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center when agency need ends. Records will be held for agency in the State Records Center 10 additional years and then transferred to the custody of the North Carolina Archives.

ITEM 12894. CLIMATOLOGICAL DATA REPORTS FILE.

Record copies of monthly weather data for North Carolina supplied by National Oceanic Atmospheric Administration (NOAA).

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12895. ENERGY PUBLICATIONS FILE.

Reference copies of documents concerning natural gas, oil, and other petroleum products. File includes informational reports generated by the federal government and energy associations.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12896. GENERAL GAS, PROPANE, AND OIL COMPANIES' FILE.

Record copies of applications, reports, and orders concerning gas, utility, and oil distributors. File includes work papers generated by Public Staff members.

DISPOSITION INSTRUCTIONS: Destroy in office after 10 years.

ITEM 12897. ANNUAL REPORTING FILE.

Reference copies of annual reports filed by gas utilities and interstate pipeline suppliers.

DISPOSITION INSTRUCTIONS: Destroy in office after 10 years.

ITEM 12898. SPECIAL COMMITTEE FILE.

Record copies of letters, reports, and workpapers of the special committee. File includes publications by the federal government, gas utilities, and state agencies.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center after 5 year(s). Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

ITEM 12899. GAS COMPANIES' DOCKET (INDIVIDUAL COMPANIES) FILE.

Reference copies of testimonies and transcripts of testimonies concerning gas docket cases. File includes applications, orders, work papers, rate schedules, and correspondence.

DISPOSITION INSTRUCTIONS: Destroy in office 1 year after order is issued by the commission or higher court, if case is appealed.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
NATURAL GAS DIVISION**

ITEM 12900. WORKING FILE.

Record copies of publications and information reports. File includes work papers generated by the federal government, gas utilities, the general public, and NCUC.

DISPOSITION INSTRUCTIONS: Transfer to the State Records Center after 10 year(s). Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the Archives.

ITEM 12901. GENERAL GAS COMPANY DOCKET FILE.

Reference copies of reports, applications, petitions, and work papers concerning all gas companies. File includes materials generated by gas companies, Commission Staff, and Public Staff.

DISPOSITION INSTRUCTIONS: Destroy in office 1 year after order is issued by the commission or higher court, if case is appealed.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
TRANSPORTATION RATES DIVISION**

ITEM 583. CLASS I, II, AND III MOTOR AND RAIL CARRIER ANNUAL REPORTS FILE.

Original and duplicate copies of annual reports and statistical data concerning motor carrier companies.

DISPOSITION INSTRUCTIONS: Destroy in office duplicate copies after 2 years. Transfer original copies to the State Records Center after 5 years. Records will be held for agency in the State Records Center 5 additional years and then transferred to the custody of the North Carolina Archives.

ITEM 12863. AGENDA OF COMMISSION CONFERENCES FILE.

Reference copies of agendas used for the presentation of various items at the commission's regular staff conferences. File may include minutes of the conferences generated by the Transportation Rates Division.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

ITEM 12864. RAIL DOCKETS (NCUC) FILE.

Reference copies of rail matters docketed by the commission requiring reports of investigation. File includes correspondence on changes in mobile agencies, removal of side tracks, disposition of freight stations, and formal complaint cases.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

ITEM 12865. RAIL MAPS SYSTEM DIAGRAMS, AND MISCELLANEOUS ICC RAIL DOCKETS FILE.

Record and reference copies of system maps for each railroad. File includes a listing of current and proposed changes in the rail lines.

DISPOSITION INSTRUCTIONS: Retain in office permanently.

ITEM 12866. RAIL APPLICATIONS FILE.

Record copies of applications filed by rail carriers seeking to produce certain publications. File includes correspondence and telegrams to change rates and tariffs.

DISPOSITION INSTRUCTIONS: Destroy in office after 2 years.

ITEM 12867. MOTOR CARRIER WORK PAPERS FILE.

Record and reference copies of work papers and tariffs used in various rate cases. File includes continuous traffic study information generated by the Transportation Rates Division.

DISPOSITION INSTRUCTIONS: Retain in office permanently.

ITEM 12868. CONSUMER COMPLAINTS FILE.

Record copies of complaints and inquiries received from utility customers in North Carolina. File includes data concerning rates, service, losses, and damage done to property.

DISPOSITION INSTRUCTIONS: Destroy in office 3 years after complaint is resolved.

ITEM 12869. RAIL ABANDONMENT APPLICATIONS FILE.

Reference copies of applications to abandon rail lines which have been filed and docketed with the Interstate Commerce Commission (ICC).

DISPOSITION INSTRUCTIONS: Retain in office permanently.

ITEM 12870. ANNUAL REPORTS FILE.

Reference copies of annual reports filed with the commission by all regulated transportation companies. File includes balance sheets, income, and back-up statements.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 years.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
TRANSPORTATION RATES DIVISION**

ITEM 12871. NCUC MOTOR CARRIER DOCKETS FILE.

Reference copies of applications, work papers, and final orders of the commission generated for each major motor carrier by the Transportation Rates Division.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 years.

ITEM 12872. TRANSPORTATION TARIFFS FILE.

Record copies of current and cancelled transportation tariffs filed with the commission within the last 3 years.

DISPOSITION INSTRUCTIONS: Destroy in office after 3 years.

ITEM 12873. RAIL MISCELLANEOUS FILE.

Reference copies of various abandonment applications and other ICC finance docketed matters prior to the Revitalization Regulatory Railroad Act.

DISPOSITION INSTRUCTIONS: Retain in office permanently.

ITEM 12874. TRUCK ORDERS FILE.

Reference copies of truck authority orders used to publish the Scopes booklet and to ensure that carrier has tariff filed.

DISPOSITION INSTRUCTIONS: Destroy in office after 30 days.

ITEM 12875. INTERSTATE COMMERCE TRANSPORTATION REPORTS FILE.

Record copies of interstate commerce commission reports. File includes rail decisions, motor carrier decisions, and financial reports.

DISPOSITION INSTRUCTIONS: Retain in office permanently.

**DEPARTMENT OF ECONOMIC AND COMMUNITY DEVELOPMENT
NORTH CAROLINA UTILITIES COMMISSION PUBLIC STAFF
WATER DIVISION**

ITEM 12876. NON-FRANCHISED SYSTEM FILE.

Reference copies of general correspondence generated by Health Services and potential utility companies concerning approval to enter regulated water and sewer systems.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12889. ANNUAL REPORT FILE.

Reference copies of correspondence generated by each regulated utility company concerning physical description of plant, well size, feed water lines, and size and number of meters. File includes financial records and balance sheets, data concerning assets, liabilities, and income received.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.

ITEM 12890. OFFICE ADMINISTRATIVE FILE.

Reference copies of leave reports and summaries, budget information, expense vouchers, equipment orders, and general correspondence from national and state sources.

DISPOSITION INSTRUCTIONS: Destroy in office leave reports after 2 years. Destroy in office remaining records after 3 years.

ITEM 12891. DOCKET FILE.

Reference copies of data concerning all docketed water utility companies. File includes applications, orders, plans, construction costs, engineering specifications, deeds, agreements, and complaints.

DISPOSITION INSTRUCTIONS: Destroy in office when agency need ends.