

DEPARTMENT OF REVENUE
OFFICE OF THE SECRETARY
PUBLIC INFORMATION DIVISION

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

PUBLIC INFORMATION 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 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.

The Department of Revenue and the Department of Cultural Resources agree that certain records series have minimal administrative, reference, or historical value. When the custodian of any official State records certifies to the Department of Cultural Resources that such records have no further use or value for official and administrative business and when the Department certifies that such records appear to have no further use or value for research or reference, then such records may be destroyed or otherwise disposed of by the agency having custody of them. As part of its program operations the Department of Revenue agrees to establish and enforce internal policies. The policy will specify how long those records must be retained and when they must be destroyed.

E-mail messages sent or received by Executive Branch agencies shall be retained for 10 years pursuant to Executive Order No. 18 (issued July 7, 2009 by Governor Beverly Perdue) and as set forth in G1 of the General Schedule for State Agency Records. Any E-mail messages requiring retention longer than 10 years, including those with permanent historical value, shall be designated with specific retention periods in this program records 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**

PUBLIC INFORMATION DIVISION

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.

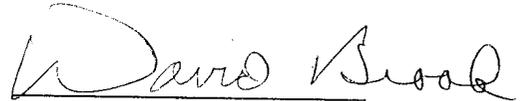
APPROVAL RECOMMENDED



Cindy D. Mallard, Chief Records Officer and Director,
Documents and Payments Processing Division

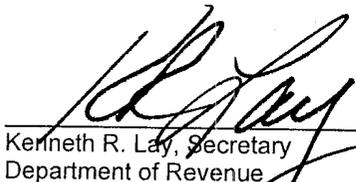


Dorothy Stevenson,
Public Information Officer

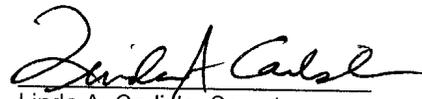


David Brook, Director
Division of Historical Resources

APPROVED



Kenneth R. Lay, Secretary
Department of Revenue



Linda A. Carlisle, Secretary
Department of Cultural Resources

DEPARTMENT OF REVENUE
OFFICE OF THE SECRETARY
PUBLIC INFORMATION DIVISION

ITEM 2758. NEWS CLIPPINGS (REFERENCE) FILE. Reference copies of news clippings received in paper and electronic formats concerning the Department of Revenue, Governor's Office, and Governor's Initiatives. (Records previously listed under the Secretary and Deputy Secretary's Office.

DISPOSITION INSTRUCTIONS: Destroy in office paper and electronic records when reference value ends.

ITEM 48482. PUBLICITY FILE. Records in electronic and paper formats concerning publicity and promotion of the department. File includes press releases, new articles, newsletters, and other related records.

DISPOSITION INSTRUCTIONS: Transfer paper records to the State Records Center after 4 years, but no later than the end of the current Secretary of Revenue's administration. Records will be held for agency in the State Records Center 4 additional years and then transferred to the custody of the Archives. Transfer electronic records after 4 years to the State Records Center for immediate transfer to the custody of the Archives, but no later than the end of the current Secretary of Revenue's administration. Contact the Government Records Branch, Electronic Records Unit prior to the transfer of electronic records.

ITEM 48481. REFERENCE FILE. Reference copies of records in paper and electronic formats used by the Public Information Officer and Hispanic Liaison to perform duties of positions. File includes reports, notes and inquires, background summaries of agency activities and operations, agency events, correspondence, and other related records.

DISPOSITION INSTRUCTIONS: Retention of e-mail records in this series is governed by G1 of the General Schedule which requires that e-mail shall be retained for ten years pursuant to Executive Order No. 18 issued July 7, 2009 by Governor Beverly Perdue. Destroy in office when reference value ends.

ITEM 48483. SPEECHES FILE. Speeches in electronic and paper formats given by the Secretary of Revenue.

DISPOSITION INSTRUCTIONS: Transfer paper records to the State Records Center after 4 years, but no later than the end of the current Secretary of Revenue's administration. Records will be held for agency in the State Records Center 4 additional years and then transferred to the custody of the Archives. Transfer electronic records after 4 years to the State Records Center for immediate transfer to the custody of the Archives, but no later than the end of the current Secretary of Revenue's administration. Contact the Government Records Branch, Electronic Records Unit prior to the transfer of electronic records.

**DEPARTMENT OF REVENUE
OFFICE OF THE SECRETARY
PUBLIC INFORMATION DIVISION**

ITEM 49269. DEPARTMENTAL INTRANET (REFERENCE) FILE. Electronic records of reference copies pertaining to the latest tax related news and developments, personnel services information, links to division websites, and other related information helpful to department employees.

DISPOSITION INSTRUCTIONS: Destroy in office when reference value ends