

Rec'd NCO 12 Nov 80

REQUEST FOR RECORDS DISPOSITION AUTHORITY
(See Instructions on reverse)

LEAVE BLANK	
JOB NO	NC1-137-81-1
DATE RECEIVED	November 13, 1980
NOTIFICATION TO AGENCY	
In accordance with the provisions of 44 U.S.C. 3303a the disposal request, including amendments, is approved except for items that may be stamped "disposal not approved" or "withdrawn" in column 10	
2-13-81 Date	<i>[Signature]</i> Archivist of the United States

TO GENERAL SERVICES ADMINISTRATION,
NATIONAL ARCHIVES AND RECORDS SERVICE, WASHINGTON, DC 20408

1. FROM (AGENCY OR ESTABLISHMENT)
General Services Administration

2. MAJOR SUBDIVISION
Transportation and Public Utilities Services

3. MINOR SUBDIVISION
Motor Equipment Division

4. NAME OF PERSON WITH WHOM TO CONFER
Ray Hershberger

5. TEL EXT
566-0673

6. CERTIFICATE OF AGENCY REPRESENTATIVE

I hereby certify that I am authorized to act for this agency in matters pertaining to the disposal of the agency's records; that the records proposed for disposal in this Request of 13 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified.

A Request for immediate disposal.

B Request for disposal after a specified period of time or request for permanent retention.

C. DATE	D. SIGNATURE OF AGENCY REPRESENTATIVE	E. TITLE	7. ITEM NO	8. DESCRIPTION OF ITEM (With Inclusive Dates or Retention Periods)	9. SAMPLE OR JOB NO.	10. ACTION TAKEN
11/10/80	<i>[Signature]</i>	Act'g Chief Records Management Br.		MOTOR EQUIPMENT PROGRAM FILES File descriptions and changes to disposition authorizations are contained in the enclosed chapter 50 to the HB, GSA Records Maintenance and Disposition System (OAD P 1820.2).	NN-171-5	

73 items

Closed Out: 2-27-81: K.T. D.
Copy Sent to Agency & All FRCC

This appendix describes and provides maintenance and disposition instructions for program records relating to the management of motor pool operations. Involved in this function is the establishment and disestablishment of motor pools; development of plans and procedures for motor pool and motor vehicles and equipment; determination of annual motor vehicle replacement requirements, including development of budget justifications and procurement specifications; conduct of motor pool and equipment operation studies and surveys; development of statistical data; and the performance of similar operations. Motor pool operation program records are created as a result of the responsibilities outlined in the GSA Organization Manual (OFA P 5440.1) and pursuant to the provisions of orders and handbooks in the 5600 subject classification series.

The original paper records for the program files described in this appendix may be converted to microform and the original paper records may be destroyed provided that the requirements and standards of the HB, GSA Micrographics Management Program, chs. 3-1 and 3 and 4-3 and 4 (OAD P 1882.1), are met.

50A1. Motor pool establishment files. Documents created in the establishment, modification, relocation, or discontinuance of interagency motor pools and motor pool facilities. Included are motor pool feasibility studies, authorizing determinations, exhibits, and amendments; copies of establishing orders; motor vehicle pool survey reports; continued operations studies and appraisals; coordinating actions; agency exemptions; vehicle assignments; special authorizations and determinations; and related records.

- a. Files relating to motor pools established: Cut off annually following discontinuance of the motor pool hold 3 _____ years, and retire to FRC. Destroy when 10 years old. However, current files should be reviewed annually and noncurrent or superseded documents and routine correspondence destroyed.
- b. Files relating to disapproved motor pools: Cut off annually, destroy when 3 years old.

50A2 - 50A4. Reserved.

50A5. Dispatch vehicle study files. Documents created as a result of studies undertaken to determine the optimum vehicle requirements to meet dispatch demands of the motor pool. Included are records of filled and unfilled dispatch vehicle demand, cost-benefit analysis studies regarding vehicle dispatch service at airports, and related documents.

Cut off annually, destroy when 1 year old.

50A6 - 50A9. Reserved.

50A10. Vehicle and equipment acquisition files. Documents created in requesting, reviewing, approving, disapproving, or canceling requests for procurement of vehicles from commercial sources and from sources of excess, seized, and forfeited vehicles. Included are copies of invitations to bid; requisitions; purchase orders; invoices; receiving reports; unsatisfactory equipment reports; requests for certificates of origin; notifications concerning, and acceptances or rejections of, excess seized, or forfeited vehicles; documents concerning contracts, warranties, and mechanical failures; and related documents.

Cut off annually, destroy when 6 years old.

50A11 - 50A14. Reserved.

50A15. Vehicle transfer files. Documents created in the transfer of vehicles within the region, between regions, and from other agencies. Included are authorizations for transfer of property or similar documents, copies of vehicle transaction records, and related documents.

Cut off annually, destroy when 2 years old.

50A16 - 50A19. Reserved.

50A20. Vehicle disposal files. Documents created upon exchange/sale of a vehicle or its declaration as excess. Included are reports of personal property for sale or reports of excess personal property, as applicable; copies of vehicle transaction records; and related documents.

Place in inactive file upon disposal of vehicle, cut off annually, destroy when 2 years old.

50A21 - 50A24. Reserved.

50A25. Vehicle identification files. Documents created in the procurement and assignment of vehicle identification (license) tags. Included are requisitioning records, shipping instructions, receiving reports, and related documents.

Cut off annually, destroy 10 years from the date of disposal of vehicle.

50A26 - 50A29. Reserved.

50A30. Vehicle repair contract files. Documents created in arranging for and monitoring contracts (awarded by FPRS) for servicing and repairing motor vehicles. Included are copies of contracts, performance evaluation reports, and related documents.

Place in inactive file on termination of contract or on completion of contract by delivery and acceptance of all materials, property, or services. Cut off the inactive file at the end of the fiscal year, destroy when 2 years old.

50A31 - 50A34. Reserved.

50A35. Agreement files. Documents relating to agreements with cost-plus contractors, grantees, other Government agencies, commercial transportation enterprises, and other organizations for providing motor vehicle and related transportation supplies and services, normally on a reimbursable basis. Included are requests for, authorization of, certification concerning, and compliance reviews involving, cross-service or other agreements; copies of the agreements; and related documents.

Cut off the agreement annually when superseded canceled, or obsolete; destroy when 6 years old; except that agreements with other Government agencies may be destroyed after cutoff.

50A36 - 50A39. Reserved.

50A40. Unauthorized credit purchase files. Documents created in recording and following up on the improper use of Government credit cards. Included are memorandums detailing misuse, unauthorized purchase, or indication of fraud; material delivery and service receipts; notifications from motor pools and other agencies concerning improper use; supporting records; and related documents.

Cut off annually, destroy when 3 years old.

50A41 - 50A44. Reserved.

50A45. Motor pool inspection files. Documents created in the inspection and onsite evaluation of motor pool systems. Included are inspection notifications, reports of findings and recommendations, followup actions, supporting papers, and related documents.

Withdraw and place in inactive file on completion of next inspection, hold until end of year, and destroy.

50A46 - 50A49. Reserved.

50A50. Motor vehicle accident files. Documents created in reporting and investigating motor vehicle accidents. Included are operators' and supervisors' reports of motor vehicle accidents, statements of witnesses, agency or GSA investigation reports, photographs, diagrams, doctors' certificates, police investigation reports, copies of motor vehicle accident résumés, suspense copies of accident reports, and other pertinent data.

- a. Cut off annually following completion of case, hold 2 years, and retire to FRC. Destroy when 6 years old.
- b. Suspense copies. Destroy following completion of case.

50A51 - 50A54. Reserved.

50A55. Modification and special device files. Documents created in the review, analysis, and approval or disapproval of modifications to, or conversions of, motor vehicles, or the installation of air conditioning, radio equipment, or other devices. Included are conversion or modification requests and justifications, approvals or disapprovals, and related documents.

Cut off annually, destroy when 2 years old.

50A56 - 50A59. Reserved.

50A60. Vehicle misuse files. Documents created in reviewing reports of alleged or observed unofficial misuse, improper use, of motor pool vehicles or facilities and in forwarding the reports through channels to the agency involved for investigation and necessary action. Included are written allegations and resumes of verbal allegations; copies of correspondence and supporting data submitted to

submitted to the agency involved; agency investigation reports, recommendations, and reports of actions taken; and related papers.

Cut off annually, destroy when 3 years old.

50A61 - 50A64. Reserved.

50A65. Temporary storage other (TSO) file. Records dealing with the removal of motor vehicles from TSO or their placement therein. Included are requests and justifications for, and Central Office approvals or disapprovals of, TSO. Also included are informal monthly recapitulations reflecting the number and type of vehicles being held in TSO by each region.

Cut off annually, destroy when 1 year old.

50A66 - 50A69. Reserved.

50A70. Other Government agency files. Correspondence and other documents created in dealing with other Government agencies on requirements for, use of, questions concerning, and policy on, motor vehicle and interagency motor pool matters which cannot logically be filed in other files defined in this appendix. (Use this par. instead of supar. 9C1a, general correspondence, when more appropriate to file by individual agency.)

Cut off annually, destroy when 3 years old.

50A71 - 50A74. Reserved.

50A75. Rental contract files. Documents relating to the procurement of, rental of, and use of, vehicles from commercial rental firms. Included are documents dealing with the contract for, use of, payment for, and discrepancies and problems concerning, car rentals; determinations and approvals of rental rates; reservation records; contractors' invoice trip tickets; material delivery and service receipts; and related documents.

- a. Reservation record, contractor's invoice trip ticket, and material delivery and service receipt pertaining to a specific rental action: Place in the applicable rental contract file.
- b. Rental contract files: Place in inactive file on termination of contract or on completion of the contract by delivery and acceptance of all services. Cut off the inactive files at the end of the fiscal year, hold 2 years, and retire to FRC. Destroy when 6 years old.

50A76 - 50A79. Reserved.

50A80. Motor pool and vehicle management report files. Titles and disposition instructions for these files are as follows:

a. Monthly operating costs and statistical report (TP-3).

(1) Central Office:

- (a) Monthly consolidated reports: Cut off annually, destroy when 2 years old.
- (b) Yearend reports: Cut off annually, destroy when 3 years old.
- (c) Copies of regional reports: Cut off annually, destroy when 2 years old.

(2) Regional offices:

- (a) Monthly consolidated reports: Cut off annually, destroy when 2 years old.
- (b) Yearend reports: Cut off annually, destroy when 2 years old.
- (c) Copies of individual motor pool reports: Cut off annually, destroy when 2 years old.

b. Motor Vehicle Consolidation Report (GSA Form 1333).

File in, and retire with, the motor pool establishment file 50A1.

c. Withdrawn by CHGE.

d. Federal Motor Vehicle Fleet Report (SE82).

Cut off annually, destroy when 2 years old.

e. Vehicle Cost and Use Report (TP-4).

(1) Central Office:

- (a) Consolidated yearend reports: Cut off annually, destroy when 5 years old.
- (b) Consolidated semiannual reports: Cut off annually, destroy when 3 years old.
- (c) Copies of regional reports: Cut off annually, destroy when 2 years old.

- (2) Regional offices:
 - (a) Consolidated yearend reports and copies of individual motor pool reports: Cut off annually, destroy when 3 years old.
 - (b) Consolidated semiannual reports: Cut off annually, destroy when 2 years old.
- f. Semiannual Vehicle Deposal Report (TP-5).
Cut off annually, destroy when 2 years old.
- g. Semiannual Vehicle Disposal Summary Report (TP-b).
Cut off annually, destroy when 3 years old, except that regional reports at Central Office shall be destroyed when superseded by a new report.
- h. Motor Vehicle Maintenance Report (TP-7).
Cut off annually, destroy when 2 years old.
- i. Withdrawn by CHGE.
- j. Monthly Vehicle Inventory Report (TP-9).
Destroy when receipt of the next report.
- k. Monthly Schedule of Changes in Motor Vehicle Data (TP-11).
 - (1) Central Office:
 - (a) Consolidated reports: Cut off annually, destroy when 5 years old.
 - (b) Copies of regional reports: Cut off annually, destroy when 2 years old.
 - (2) Regional offices:
 - (a) Consolidated reports: Cut off annually, destroy when 3 years old.
 - (b) Copies of individual motor pool reports: Cut off annually, destroy when 2 years old.
- l. Monthly report of cost by object class (FS 272).
Destroy when no longer required. *(Transfer to FRC not authorized)*

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- m. Motor Pool System Locations Report (FS-280).
 Destroy when no longer required. *(Transfer to F.R.C. not authorized)* *Adm
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- n. Quarterly Sales Summary by Customer Agency (TP-14). (Record copies are maintained by Office of Finance.)
 Destroy upon receipt of next report.
- o. Consolidated Age and Mileage Analysis Report (TP-13).
 Cut off annually, destroy when 2 years old.
- p. Withdrawn by CHGE .
- q. Direct Cost by Vehicle Body Type and Year Model Report (TP-15).
 - (1) Central Office:
 - (a) National consolidated reports: Cut off annually, destroy when 2 years old.
 - (b) Regional reports: Cut off annually, destroy when 2 years old.
 - (2) Regional offices:
 Regional consolidated reports and copies of individual motor pool reports: Cut off annually, destroy when 2 years old.
- r. Withdrawn by CHGE .
- s. Motor Pool Summary of Motor Vehicle Cost, Inventory, and Use Report (TP-16).
 - (1) Yearend reports: Cut off annually, destroy when 3 years old.
 - (2) Other reports: Cut off annually, destroy when 2 years old.
- t. Motor Pool Summary of Sales and Expense Report (TP-17).
 - (1) Yearend reports: Cut off annually, destroy when 3 years old.
 - (2) Other reports: Cut off annually, destroy when 2 years old.

u. Monthly Vehicle Inventory Status Change Listing Report (TP-10).

Destroy when no longer required. *(Transfer to FRC not authorized).* *Applied
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v. Monthly Motor Vehicle Maintenance Exception List Report (FS-267).

Destroy upon receipt of next report.

w. Annual Capitalized Report (TP-18).

(1) Central Office:

(a) National Consolidated reports: Cut off annually, destroy when 2 years old.

(b) Copies of regional reports: Destroy upon receipt of the next report.

(2) Regional offices:

Cut off annually, destroy when 2 years old.

x. Monthly Motor Pool Summary of Labor Distribution (TP-23).

Cut off annually, destroy when 1 year old.

y. Monthly Motor Pool Service Station Accrual List.

Destroy upon receipt of the next list.

z. Monthly Motor Labor and Supplies List.

Destroy upon receipt of the next list.

aa. Monthly Motor Pool Detailed Income by Sales Code List.

Cut off annually, destroy when 1 year old.

bb. Monthly Motor Pool Detailed Expense by Cost Account List.

Cut off annually, destroy when 1 year old.

This appendix describes and provides maintenance and disposition instructions for program records relating to the motor equipment management function. This function is concerned with development of plans and procedures governing the management, use, and operation of motor equipment; formulation of training programs; establishment of standards for use or replacement of motor equipment; conduct of surveys of motor vehicle and equipment practices in other Government agencies; planning and initiation to determine the most efficient and economical use of motor vehicles and equipment; and similar matters. Motor equipment management program records are created as a result of the responsibilities outlined in the GSA Organization Manual (OFA P 5440.1) and pursuant to the provisions of orders and handbooks in the 5600 subject classification series.

The original paper records for the program files described in this appendix may be converted to microform and the original paper records may be destroyed provided that the requirements and standards of the HB, GSA Micrographics Management Program, chs. 3-1 and 3 and 4-3 and 4 (OAD P 1882.1), are met.

50B1. Motor vehicle management study files. Documents created in conducting studies of motor equipment practices in other Government agencies. Included are study reports with findings, recommendations, and all related records.

Cut off annually, hold 3 years, and retire to FRC.
Destroy when 15 years old.

50B2 - 50B4. Reserved.

50B5. Operator permit control files. Applications for motor vehicle operator's identification cards and related records.

a. Current applications: Upon transfer or separation of employee, withdraw and forward to appropriate personnel office for inclusion in the official personnel file.

b. Superseded applications: Upon receipt of renewal application, withdraw and place in inactive file, cut off inactive file annually, destroy when 2 years old.

50B6 - 50B9. Reserved.

50B10. Motor equipment study files. Documents created in planning, initiating, and conducting cost/benefit studies to determine the most efficient and economical use of motor vehicles and equipment. Included are studies dealing with vehicle replacement standards, air pollution, disc brakes, air conditioning, radio installation, and similar matters.

Cut off annually on completion of the study, hold 3 years, and retire to FRC. Destroy when 8 years old.

Note.--When directives or other publications result from the study, place backup material in the instruction file for that directive or publication.

50B11 - 50B14. Reserved.

50B15. Motor equipment training files. Documents relating to the conduct of training sessions, seminars, and workshops on defensive driving techniques; management, operation, and maintenance of motor equipment; and other motor transportation activities. Included are requests for, notifications of, and arrangements for, training; communications about the number of people trained; seminar reports; correspondence; and related records.

Cut off annually, destroy when 2 years old.

50B16 - 50B19. Reserved.

50B20. Motor equipment training materials. Documents relating to the preparation, clearance, and issue of training materials pertaining to defensive driving techniques, and management, operation, and maintenance of motor equipment. Included are instructors' manuals, visual aids, instruction outlines, tests, handouts, training aids, and related records.

- a. Office preparing Government-wide training materials:
Destroy when no longer needed. *(Transfer to FRC not authorized). 11 Feb 77*
- b. Other Offices: Destroy when superseded or obsolete.

50B21 - 50B24. Reserved.

50B25. Motor equipment management reports. Titles of, and maintenance disposition instructions for, these reports are as follows:

- a. Federal Motor Vehicle Fleet Report.
 - (1) Government-wide reports (record copy): Cut off annually, destroy when 5 years old.
 - (2) Federal agency reports: Cut off annually, destroy when 3 years old.
 - (3) Worksheets and other supporting papers: Cut off annually, destroy when 1 year old.
- b. Report of Exempted Vehicles.
Cut off annually after termination, destroy when 1 year old.
- c. Service Agreement Report.
Cut off annually, destroy when 2 years old.