

REQUEST FOR RECORDS DISPOSITION AUTHORITY

(See Instructions on reverse)

LEAVE BLANK

JOB NO
NC1-137-85-1

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

DATE RECEIVED
12-11-84

1 FROM (Agency or establishment)
General Services Administration

NOTIFICATION TO AGENCY

2 MAJOR SUBDIVISION
Office of Federal Supply and Services

In accordance with the provisions of 44 USC 3303a the disposal request, including amendments, is approved except for items that may be marked "disposition not approved" or "withdrawn" in column 10. If no records are proposed for disposal, the signature of the Archivist is not required.

3 MINOR SUBDIVISION
National Fleet Management Division

4 NAME OF PERSON WITH WHOM TO CONFER
Marria Braden

5 TELEPHONE EXT
535-7934

DATE
Feb-14-85

ARCHIVIST OF THE UNITED STATES
Robert W. Mann

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 15 page(s) are not now needed for the business of this agency or will not be needed after the retention periods specified, and that written concurrence from the General Accounting Office, if required under the provisions of Title 8 of the GAO Manual for Guidance of Federal Agencies, is attached

A GAO concurrence is attached, or is unnecessary

B DATE 8/28/84	C SIGNATURE OF AGENCY REPRESENTATIVE <i>[Signature]</i>	D TITLE Actg. Chief, Records and Forms Management Branch
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7 ITEM NO	8 DESCRIPTION OF ITEM <i>(With Inclusive Dates or Retention Periods)</i>	9 GRS OR SUPERSEDED JOB CITATION	10 ACTION TAKEN <i>(NARS USE ONLY)</i>
	<p><u>Fleet Management Program Records</u></p> <p>Enclosed are proposed changes to the file descriptions and disposition schedules of Ch. 50, Fleet Management Program Records (OAD P 1820.2). This change includes reports generated by the DEPMAIN computer system. The unchanged items in this schedule have been marked out.</p>	NC1-137-81-1	16 items

CHAPTER 50. FLEET MANAGEMENT PROGRAM RECORDS

1. General. This chapter provides documentation, maintenance, and disposition instructions for records accumulated at Central Office and the regions in the development and operation of programs concerned with the management, operation, repair, and maintenance of automotive and other motorized equipment. These instructions are contained in:

a. Appendix 50-A. Fleet Management Center Operations Program Records

b. Appendix 50-B. Fleet Management Program Records

2. Microfilming records. The records described in this chapter may be converted to microform and the original paper records destroyed if the requirements of the HB, GSA Micrographics Management Program, chs. 3-1 and 3, and 4-3 and 4 (OAD P 1882.1), are met.

This appendix provides maintenance and disposition instructions for program records on the management of fleet management operations. This includes establishing and disestablishing Fleet Management Centers; developing plans and procedures for vehicles and equipment; determining annual replacement requirements, including budget justifications and procurement specifications, studies and surveys, and development of statistical data. Fleet management operation program records are created under the GSA Organization Manual (OHR P 5440.1) and pursuant to the provisions of GSA orders and handbooks in the 5600 subject classification series.

Appendix 50-A. Fleet Management Center
Operations Program Records

50A1. ~~Fleet Management Center establishment files (NCl-137-81-1).~~

Documents created in establishing, modifying, relocating, or discontinuing interagency Fleet Management Centers and Fleet Management Center facilities. They include feasibility studies, authorizations, exhibits, and amendments; copies of orders; motor vehicle survey reports; operations appraisals; agency exemptions; vehicle assignments; and related records.

- a. Files on Fleet Management Centers established:
Cut off annually following discontinuance of the Fleet Management Center, hold 3 years, and retire to FRC. Destroy when 10 years old. Review current files annually and destroy noncurrent or superseded documents and routine correspondence.
- b. Files on disapproved Fleet Management Centers:
Cut off annually; destroy when 3 years old.

50A2 - 50A4. Reserved.

50A5. ~~Dispatch vehicle study file (NCl-137-81-1).~~ Documents related to motor vehicle demand studies. They include records of filled and unfilled dispatch vehicle demand, cost-benefit analyses on vehicle service at airports, and related records.

Cut off annually; destroy when 1 year old.

50A6 - 50A9. Reserved.

50A10. ~~Vehicle and equipment acquisition files (NCl-137-81-1).~~

Documents created in requesting, reviewing, approving, disapproving, or canceling requests to procure vehicles from commercial sources, or to obtain excess seized or forfeited vehicles. They include copies of invitations to bid; requisitions; purchase orders; invoices; receiving reports; unsatisfactory equipment reports; requests for certificates of origin; notices of acceptance or rejection of excess seized or forfeited vehicles; documents concerning contracts, warranties, and mechanical failures; and related records.

Cut off annually; destroy when 6 years old.

50A11 - 50A14. Reserved.

50A15. ~~Vehicle transfer files (NCl-137-81-1)~~. Documents created in transferring vehicles within a region, between regions, and from other agencies. They include authorizations for transfer of property, copies of vehicle transaction records, and related records.

Cut off annually; destroy when 2 years old.

50A16 - 50A19. Reserved.

50A20. ~~Vehicle disposal files (NCl-137-81-1)~~. Documents created upon exchange/sale of a vehicle or its declaration as excess. They include reports of personal property for sale or excess personal property, copies of vehicle transaction records, and related records.

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

50A21 - 50A24. Reserved.

50A25. ~~Vehicle identification files (NCl-137-81-1)~~. Documents created in procuring and assigning vehicle identification (license) tags. They include requisitions, shipping instructions, receiving reports, and related records.

Cut off annually; destroy 5 years from the date of disposal of vehicle.

50A26. ~~Vehicle rental rates (_____)~~. Documents created in computing rental rates for vehicles.

Cut off annually; destroy when 2 years old.

50A27 - 50A29. Reserved.

50A30. ~~Vehicle repair contract files (NCl-137-81-1)~~. Documents created in arranging for and monitoring contracts (awarded by FPRS) for servicing and repairing motor vehicles. They include copies of contracts, performance evaluation reports, and related records.

Place in inactive file when contract terminated or completed. Cut off at the end of the fiscal year; destroy when 2 years old.

50A31 - 50A34. Reserved.

50A35. Agreement files (NCl-137-81-1). Agreement documents with cost-plus contractors, grantees, other Government agencies, commercial transportation enterprises, and other organizations that provide motor vehicle and related transportation supplies and services, normally on a reimbursable basis. They include requests for, authorizations of, certifications concerning, and compliance reviews involving, cross-service or other agreements; copies of the agreements; and related records.

Cut off the annually when superseded, canceled, or obsolete; destroy when 6 years old. Destroy agreements with other Government agencies after cutoff.

50A36 - 50A39. Reserved.

50A40. Unauthorized credit purchase files (NCl-137-81-1). Documents that monitor the improper use of Government credit cards. They include memorandums detailing misuse, unauthorized purchase, or indicating fraud; material delivery and service receipts; notices from Fleet Management Centers and agencies concerning improper use; supporting records; and related records.

Cut off annually; destroy when 3 years old.

50A41 - 50A44. Reserved.

50A45. Fleet Management Center inspection files (NCl-137-81-1). Documents created in inspecting and evaluating Fleet Management Center systems. They include inspection notices, reports of findings and recommendations, followup actions, and related records.

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 (GRS 10-5). Documents created in reporting and investigating motor vehicle accidents. They include operators' and supervisors' accident reports, statements of witnesses, agency or GSA investigation reports, photographs, diagrams, doctors' certificates, police investigation reports, copies of accident resumes, suspense copies of accident reports, and related records.

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

50A51 - 50A54. Reserved.

50A55. Modification and special device files (NCl-137-81-1). Documents created in reviewing, analyzing, and approving or disapproving modifications to, or conversions of, motor vehicles, or the installation of air-conditioning, radio equipment, or other devices. They include conversion or modification requests and justifications, approvals or disapprovals, and related records.

Cut off annually; destroy when 2 years old.

50A56 - 50A59. Reserved.

50A60. Vehicle misuse files (NCl-137-81-1). Documents created in reviewing reports of alleged or observed misuse, and improper use of Fleet Management Center vehicles or facilities. They include allegations; copies of correspondence and supporting data; agency investigative reports, recommendations, and reports of actions taken; and related records.

Cut off annually; destroy when 3 years old.

50A61 - 50A64. Reserved.

50A65. Temporary storage other (TSO) file (NCl-137-81-1). Documents created in dealing with removing motor vehicles from TSO or their placement therein. They include requests and justifications for, and Central Office approvals or disapprovals of, TSO. They also include informal monthly summaries that show the number and type of vehicles held in TSO by each region.

Cut off annually; destroy when 1 year old.

50A66 - 50A69. Reserved.

50A70. Other Government agency files (NCl-137-81-1). 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 Fleet Management Center matters which

cannot logically be filed in other files defined in this appendix. (Use this par. instead of subpar. 9Cla, 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 (NCl-137-81-1). Documents on procuring, renting, and using, vehicles from commercial rental firms. They include 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 records.

- 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 when contract terminated or completed. Cut off at the end of the fiscal year, hold 2 years, and retire to FRC. Destroy when 6 years old.

50A76 - 50A79. Reserved.

50A80. Fleet Management Center and vehicle management report files (NCl-137-81-1). Titles and disposition instructions for these files are as follows:

a. Interagency Fleet Management Center Operating Costs and Statistical Report (FS-263).

- (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 Fleet Management Center reports: Cut off annually; destroy when 2 years old.

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

File in, and retire with, the Fleet Management Center establishment file 50A1.

c. Agency Report of Motor Vehicle Data (SF82).

Cut off annually; destroy when 2 years old.

d. Vehicle Cost and Use Report (FS-264).

(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 Fleet Management Center reports: Cut off annually; destroy when 3 years old.
- (b) Consolidated semiannual reports: Cut off annually; destroy when 2 years old.

e. Semiannual Vehicle Disposal Report (FS-265).

Cut off annually; destroy when 2 years old.

- f. Semiannual Exchange Sale Summary (FS-266).
Cut off annually; destroy when 3 years old. Destroy regional report at Central Office when superseded by a new report.
- g. Annual Motor Vehicle Maintenance Report (FS-268).
Cut off annually; destroy when 2 years old.
- h. Monthly Vehicle Inventory Report (FS-269).
Destroy upon receipt of the next report.
- i. Schedule of Changes in Motor Vehicle Data (FS-271).
 - (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 Fleet Management Center reports: Cut off annually; destroy when 2 years old.
- j. Monthly Report of Costs by Object Class (FS-272).
Destroy when no longer required. (Transfer to a records center is not authorized.)
- k. Sales Summary by Customer Agency (FS-274). Record copies are maintained by Office of Finance.)
Destroy upon receipt of next report.
- l. Consolidated Age and Mileage Analysis Report (FS-273).
Cut off annually; destroy when 2 years old.

m. Direct Costs by Vehicle Body Type and Year Model (FS-275).

- (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 Fleet Management Center reports: Cut off annually; destroy when 2 years old.

n. Motor Pool Summary of Motor Vehicle Cost, Inventory, and Use (FS-276).

- (1) Yearend reports: Cut off annually; destroy when 3 years old.
- (2) Other reports: Cut off annually; destroy when 2 years old.

o. Motor Pool Summary of Sales and Expenses (FS-277).

- (1) Yearend reports: Cut off annually; destroy when 3 years old.
- (2) Other reports: Cut off annually; destroy when 2 years old.

p. Monthly Vehicle Inventory Status Change Listing (FS-270).

Destroy when no longer required. (Transfer to a records center is not authorized.)

q. Monthly Motor Vehicle Maintenance Exception List Report (FS-267).

Destroy upon receipt of next report.

- r. Annual Capitalization Report (FS-278).
 - (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.
- s. Monthly Fleet Management Center Summary of Labor Distribution (FS-250).
Cut off annually; destroy when 1 year old.
- t. Monthly Fleet Management Center Service Station Accrual List.
Destroy upon receipt of the next list.
- u. Monthly Fleet Management Center Labor and Supplies List.
Destroy upon receipt of the next list.
- v. Monthly Fleet Management Center Detailed Income by Sales Code List.
Cut off annually; destroy when 1 year old.
- w. Monthly Fleet Management Center Detailed Expense by Cost Account List.
Cut off annually; destroy when 1 year old.
- x. Vehicle Inventory by Class/Tag (GRS 3-10a).
Cut off semiannually; destroy 2 years from date of list.
- y. Vehicle Inventory by Status (GRS 3-10a).
Cut off semiannually; destroy 2 years from date of list.

- z. Error List.
Cut off monthly; destroy when 1 month old.
- aa. Data Input by Transmittal.
Cut off monthly; destroy when 1 month old.
- bb. Valid Data Input.
Cut off quarterly; destroy when 3 months old.
- cc. Inspection Schedule Library.
Destroy upon receipt of next report.
- dd. Vehicle History Report.
Destroy when no longer required. (Transfer to a records center is not authorized)
- ee. Data Input to Motor Pool Accounting and Reporting System (MARS) by Transmittal.
Cut off monthly; destroy when 1 month old.
- ff. Monthly Listing of Dispatches, Charges, and Adjustments.
Cut off semiannually; destroy when 6 months old.
- gg. Monthly Job Execution Report.
Cut off annually; destroy when 1 year old.
- hh. Utilization Performance Indicators Report.
Cut off annually; destroy when 1 year old.
- ii. Summary Utilization Report.
Cut off annually; destroy when 1 year old.
- jj. Rotation Report.
Destroy upon receipt of next report.
- kk. Replacement Analysis Report.
Destroy upon receipt of next report.

This appendix provides maintenance and disposition instructions for program records on the fleet management function. This includes the development of plans and procedures for managing, using, and operating motor equipment; developing training programs; establishing standards for use or replacement of motor equipment; conducting surveys of motor vehicle and equipment practices in other Government agencies; and planning for efficient and economical use of motor vehicles and equipment. Motor equipment management program records are created under the GSA Organization Manual (OHR P 5440.1) and GSA orders and handbooks in the 5600 subject classification series.

Appendix 50-B. Fleet Management Program
Records

50B1. Motor vehicle management study files (NCl-137-81-1). Documents created in conducting studies of motor equipment practices in other Government agencies. They include 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. Withdrawn by CHGE_____.

50B6 - 50B9. Reserved.

50B10. Motor equipment study files (NCl-137-81-1). Documents created in planning, initiating, and conducting cost/benefit studies to determine the most efficient and economical use of motor vehicles and equipment. They include studies dealing with vehicle replacement standards, air pollution, disc brakes, air-conditioning, radio installation, and related records.

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 (NCl-137-81-1). Documents on conducting training sessions, seminars, Contract Officer Warrant Program, and workshops on defensive driving techniques; management, operation, and maintenance of motor equipment; and other motor transportation activities. They include 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 (NCl-137-81-1)~~. Documents on preparing, clearing, and issuing training materials on defensive driving techniques, management, Contract Officer Warrant Program, operation, and maintenance of motor equipment. They include instructors' manuals, visual aids, instruction outlines, tests, handouts, training aids, and related records.

- a. Office preparing governmentwide training materials: Destroy when no longer needed. (Transfer to a record center is not authorized.)
- b. Other offices: Destroy when superseded or obsolete.

50B21 - 50B24. Reserved.

50B25. ~~Motor equipment management reports (NCl-137-81-1)~~. Titles of, and maintenance disposition instructions for, these reports are as follows:

- a. Federal Motor Vehicle Fleet Report.
 - (1) Governmentwide 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.
- d. Acquisition Forecast.
Cut off annually; destroy when 2 years old.