

REQUEST FOR RECORDS RETENTION SCHEDULE
Submitted to the Records Manager Division
Hall of Records Commission

SCHEDULE NO. **309**

PAGE NO. **1**

1. Requesting Agency DEPARTMENT OF MENTAL HYGIENE	2. Division or Bureau of Requesting Agency ROSEWOOD STATE TRAINING SCHOOL
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3. Authorization Requested (Check only one of the squares below).

A Dispose of present accumulation. No additional accumulation is anticipated. Records have ceased to have value to warrant retention.

B Establish retention schedule for records for which there is a continuing accumulation. The records will cease to have value to warrant their retention after the period of time indicated.

C Microfilm and destroy originals. Originals if not microfilmed would be retained for the period of time indicated.

4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
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1. GENERAL CORRESPONDENCE

Size: 8½" x 11"
Dates: 1954 - -
Quantity: 2 cubic feet
File Arrangement: Alphabetical by subject

This file contains correspondence received from or directed to individuals, counties, State agencies, or agencies of the Federal government. It is concerned with personnel relations, recruiting, and other activities of the Personnel Division. Correspondence pertaining to individual employees is filed in the Employees' Personnel Folder file (Item 2).

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

2. PERSONNEL FOLDERS

Size: 8½" x 13"
Dates: 1939 - -
Quantity: 38 cubic feet
File Arrangement: Alphabetical by employee
Annual Accumulation: 3.5 cubic feet
Disposable Amount: 18 cubic feet (estimate)

Personnel folders are maintained for each employee of the Training School. A typical folder may contain any of the following records:

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7. Agency, Division or Bureau Representative

George C. Medaury 
Signature

Supt
Title

8/29/57
Date

Schedule Authorized as Indicated in Col. 6 by Hall of Records Commission.

Disposal Authorized as Indicated in Col. 6 by Board of Public Works.

SEP 13 57

Date

Morris S. Radloff
Archivist

Date

[Signature]
Secretary

STATE OF TEXAS
COMMISSION FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

4. Item

5. Description of Records

Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation of Hall of Records and Board of Public Works.

SEC 101, Application for State Employment
SEC 102, Application for State Employment
SEC 130, Request for Temporary Employment
SEC 133, Report of Unsatisfactory Services
Employee's Withholding Statements (Form W-2)
Clearance check
Time cards (record of days actually worked)
Results of Employee's tests
Correspondence relating to sick leave, credit matters, vacation, etc.
Medical records created during the period of employment and filed in the Personnel Folder when an employee is separated.

RECOMMENDATION: RETAIN FOR FIVE YEARS AFTER EMPLOYEE'S SEPARATION AND THEN DESTROY.

3. PERSONNEL DATA CARD

Size: 5" x 8"
Dates: 1929 - -
Quantity: 1.5 cubic feet
File Arrangement: Alphabetical by employee
Annual Accumulation: Less than 1/4 cubic foot

A Personnel Data Card is prepared and filed for each employee of Rosewood Training School. The card shows the following information: name of employee, class, date of employment, number of dependents, social security number, person referring, birth place, marital status, maiden name, age, height, weight, race, police record, mental patient record, party to notify in an emergency, educational background, and previous job experience. On the reverse are columns for recording employee status, date of status change, salary rate, and remarks. Other entries include: date and nature of employment termination; a statement by the employee as to whether he would accept employment in the same or another department; remarks; and a listing of relatives employed at Rosewood.

RECOMMENDATION: RETAIN PERMANENTLY.

4. APPLICATION FOR EMPLOYMENT

Form No.: SEC 102
Size: 8 1/2" x 11"
Dates: 1949 - -
Quantity: 7 cubic feet
File Arrangement: Alphabetical by applicant
Annual Accumulation: 1 cubic foot
Disposable Amount: 4 cubic feet (estimate)

An Application for Employment is completed and filed for each

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[Signature]
SECRETARY

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applicant. All applications in this file were initiated by persons who were not employed. Applications of those who have been employed are filed in the individual employee's Personnel Folder (Item 2).

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

5. EMPLOYEE'S TIME CARDS

Size: 5" x 8"
Dates: 1953 - -
Quantity: 1/2 cubic foot
File Arrangement: Chronological and alphabetical therein

Two annual time cards (fiscal year basis) are prepared for each employee of Rosewood Training School. Each of the two cards (orange and blue) shows employee's name and group and type of absence (leave with permission or w/o pay, regular day off, AWOL, sick, or vacation) for a bi-weekly period. Bi-weekly periods are posted on SEC, form # 128 card. The card is an internal record only.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY

MAINTENANCE DEPARTMENT

6. GENERAL CORRESPONDENCE

Size: 8 1/2" x 11"
Dates: 1952 - -
Quantity: 1.5 cubic feet
File Arrangement: Alphabetical by name and subject
Annual Accumulation: Less than 1/2 cubic foot

This file consists of correspondence and memoranda received from or directed to individuals, State agencies, and business firms. It reflects the maintenance activities of the Maintenance Department.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY

7. WORK ORDERS

Size: 4" x 6"
Form No.: DMH-P-6
Dates: 1954 - -
Quantity: 3 cubic feet
File Arrangement: Chronological
Annual Accumulation: 1 cubic foot

A Work Order is prepared in duplicate when construction, repair,

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installation, or moving is requested by other departments at the School. The pink copy of the work order is retained by the Maintenance Department and the white copy is forwarded to the appropriate shop as notification to complete the work requested. After the work has been completed, the white duplicate is returned to the Maintenance Department and the pink copy destroyed according to the provisions of the statute governing non-record material (Article 41, Section 155, Annotated Code of Maryland, 1951 Edition).

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

8. WORK ORDER REGISTER

Size: 8½" x 11"
Dates: 1954 - -
File Arrangement: Chronological

A Work Order Register sheet is prepared monthly, based on the Work Orders (Item 7) completed during the month. Each sheet lists in columns the work order number, date approved, date completed and code number for regular maintenance, emergency, or capital improvement.

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9. ACCOUNTING RECORDS

Dates: 1920 - -
Quantity: 200 cubic feet
File Arrangement: Chronological
Disposable Amount: 150 cubic feet
Audit: State

This item includes all standard accounting forms used by State agencies as supporting data to the final books of entry. The final books of entry are to be retained permanently. Specifically the supporting records are:

Comptroller of the Treasury

Form No.

E-1-S
E-1 and E-2

Memorandum of Adjustment
Distribution of Charges
Transmittal

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DD-1 Certificate of Deposit and Bank Deposit Slip
 R-2 (formerly MR-2) Monthly Report of State Funds Collected and Deposited
 Distribution of Unexpended and Obligated Balances
 Monthly Statement of Balances

Purchasing Bureau (Department of Budget and Procurement)

1-A Requisition for Supplies
 47-A Purchase Order
 100-16 Out-of-Schedule Requisition for Supplies
 39-A and 40-A Stores Requisition
 CF-2 Copy of Contract Awarded
 CF-1 Capital Fund Requisition for Equipment
 100/24 Actual Emergency and Repairs Report
 27-A Copy of Contract Awarded
 CF-3 Copy of Contract Awarded
 Delivery Invoices
 26-A Notice of Award of Contract
 52 Credit Memorandum
 51 Report of Partial Delivery

Budget Bureau (Department of Budget and Procurement)

BB-1 (Rev.) Formerly BB-1 and BB-2
 Budget Schedule Amendment Sheet
 B.P. Inv. R101 Report of Fixed Assets (annual)
 B.P. Inv. R102 Report of Materials and Supplies (annual)
 B.P. Inv. 6 Materials and Supplies Physical Inventory (annual)

Budget Form Nos. 1 thru 11

Budget Estimates Fiscal Year (13 pages including farm statement)
 PP-1-A Power Plant Utility Report (monthly)
 Farm Report (Annual)
 Farm Report (Monthly)
 Food Report (Monthly)

Others

Vendors Invoices
 Bank Deposit Slips
 Bank Statements
 Bank Deposit Receipts
 Canceled Checks
 Check Stubs
 P-1 Stock Record Card
 P-3 Memorandum Receipt and Property Condemnation Report
 P-7 Delivery Order and Receipt

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B-108
DMH-101

Bid Form
Confirming Order
Daily Receiving Report
County Patient Maintenance Bills
Inventory Work Sheets
Patient's Cash Receipts
Occupational Therapy Cash Receipts and reports of sales
Daily and Weekly Occupational Therapy Reports
General Fund Cash Receipt
Recreation Fund Receipts
Daily Feeding Record for Employees and Patients
Daily Farm Report
Cashier's Report
Cash Register Tapes
Storeroom Receiving Report
Pantry Inventory
Kitchen Requisitions
Guest Meal Register
Meal Tickets (no longer used)
Meal Book receipts
Dietary Reports
Donable Food Records
Meal Authorization Record
Priority Data
Sewing Room Weekly Report
Requisition for Supplies and Material (Internal)
Equipment - Debit and Credit Slips (Internal)

MSH 2

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

10. ACCOUNTING RECORDS FOR WHICH DISPOSAL HAS BEEN PROVIDED BY A GENERAL RECORDS RETENTION SCHEDULE.

PAYROLL (Prior to July 1, 1953). The agency copy of this payroll form is to be retained for five years or until audited, whichever is later, and then destroyed. (General Schedule No. G-1, Item 1-d, approved by the Board of Public Works, January 11, 1954).

PAYROLL JOURNAL - The agency copy is to be retained for three years or until audited, whichever is later and then destroyed. (General Schedule No. G-2, Item 1-d, approved by the Board of Public Works, January 11, 1954).

PAYROLL EXCEPTIONS, ADDITIONS AND DEDUCTIONS - The agency copy is to be retained for three years or until audited, whichever is later, and then destroyed. (General Schedule No. G-2, Item 3-B, approved by the Board of Public Works, January 11, 1954).

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JAN 16 1957
J. McQuinn

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PAY WARRANTS - The agency copy is to be retained for three years or until audited, whichever is later, and then destroyed. (General Schedule No. G-3, Item 3, approved by the Board of Public Works, May 10, 1954).

RECEIVING WARRANTS - The agency copy is to be retained for three years or until audited, whichever is later, and then destroyed. (General Schedule No. G-4, Item 3, approved by the Board of Public Works, May 10, 1954).

TRANSMITTAL FORM E-1 or E-2 (Comptroller of the Treasury Form) is to be retained for three years or until audited, whichever is later and then destroyed. (General Schedule No. G-5, Item 3, approved by the Board of Public Works, May 10, 1954).

11. MASTER AUTHORIZATION

This State-wide form of the Commissioner of Personnel is the authorization for entering the employee's name on the payroll or for making any changes in the pay rate. It also shows all pay deductions.

RECOMMENDATION: RETAIN WHILE EMPLOYED AND FOR THREE YEARS AFTER DATE OF SEPARATION, OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

12. LEAVE RECORDS

File includes the following records:

- Leave record card - Form SEC 128, a standard State-wide form, prepared annually for each employee
- Leave applications
- Doctor's certificates

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

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